

Tavistock Institute of Human Relations (THE) Trustees' Annual Report

1 October 2023 — 30 September 2024

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Who we are

Council of trustees

Professor Lucian J Hudson, *Chair*
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CEO

Dr Eliat Aram PhD, MSc Occup Psych, MSc G Psych, CBAM, CDir IoD

Company Secretary

Camilla Child, BA (Hons) Political Science and French; MSc Social Policy; MA Advanced Organisational Consultation; Certificate in Conflict Resolution (acc. Bar Council)

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Charity registration number: 209706

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Solicitor: Wedlake Bell LLP, 71 Queen Victoria St, London EC4V 4AY

Mission

We study how humans relate to each other in groups and organisations around the world, to help individuals and organisations navigate complexity, change, and human dynamics.

[Professional development](#) | [Research and evaluation](#) | [Consulting services](#) | [Coaching](#) | [Arts & Organisation](#)

We consider the whole system, applying social science methods to address research questions and creative, psychoanalytic and systems approaches to respond to organisational challenges.

Status

We are a UK-based not for profit organisation established with charitable purpose in 1947, with sister organisations in Germany and China and a global programme of work.

We are governed by our Articles of Association dated 20 September 1947 as amended on 25 June 1963, 20 March 1991 and 22 July 2010.

Ultimately accountable to the Association members, a Council of Management act as the board of trustees and work with the CEO and Management team to deliver against the mission and objectives.

Values

Our values explain *how* we work. We focus on how humans relate to each other and non-human systems, how we grow in character and how we embrace learning, creativity and change.

We work across and between boundaries

We work across disciplines and draw on a rich mix of expertise and thinking.

We create safe spaces for difficult conversations

We listen, observe and engage in dialogue. We work with and for people in everything we do.

We work with hidden and sometimes unconscious factors

...whilst staying grounded in the context and in what might be under the surface.

We put theory and knowledge into practice

Our practice is evidence-based and we depend on data - both that which is derived from rational research methods and that which is derived from explorations of the mind. We are able to play with ideas, myths and stories to deepen the meaning and application of our research outcomes.

We bring rigour, reflection and care to our work

We partner with our clients to achieve the best outcome, journeying with them to access and apply their own resources.

We work with the unexpected

Our expertise is in stepping into the unknown whilst navigating anxieties and uncertainties and all that these bring to the fore. We can take helpful risks for clients to reach the goals of our work together.

Letter from Dr Eliat Aram, Chief Executive Officer

Reflections on a year of challenge and transformation

This year has been tough—financially, structurally, and emotionally. Leading an independent not-for-profit in times of uncertainty is no easy task, and I find myself reflecting deeply on what sustains us. The answer, as always, lies in the relationships we nurture—with each other, with our partners, and with the wider world we seek to understand and support.

Across our international programmes, from Berlin to Beijing, from research on climate, neurodiversity, and social care to our work with GambleAware in tackling gambling-related harms, supporting young people in learning and activism through projects like PARCS, and strengthening education and training pathways through CVET and Westminster, we continue to hold space for the complexities of human experience.

Our Arts and Organisation work, our Professional Development and Group Relations programmes have invited us to sit with the unspoken - shame, power, belonging - and to find meaning and authority in what is often hidden beneath the surface.

This year, the Leicester Conference held a mirror to the dynamics of leadership and care, surfacing a striking discourse on mothers, mothering, and the unseen labour of holding things together.

It is a theme that resonates far beyond the conference boundaries. In many ways, our work—whether in organisations, communities, or within ourselves—is about navigating the tensions between holding and letting go, between tradition and change.

I do not take for granted the commitment, generosity, and sheer perseverance of those who make this work possible. In a year of challenge, I am reminded that leadership is not about having all the answers—it is about staying with the questions, together. Thank you to all who continue to walk this path with us.



6 February 2025

Letter from Lucian Hudson, Chair of Trustees

This Annual Report shines a light on the breadth and depth of the work of The Tavistock Institute of Human Relations, its quality of leadership and teamwork, and unstinting commitment to adding value to every field where it operates.

We live in troubled times which we ourselves are experiencing. We know how easily unsettled people can be under pressure and stress. We know how important it is not to lose sight of the human factor. We strive to give close attention to what is really going on in systems and groups. In so doing, we draw inspiration and energy from the challenges that face the organisations and groups we support. Our creative response can take many forms as this report demonstrates.

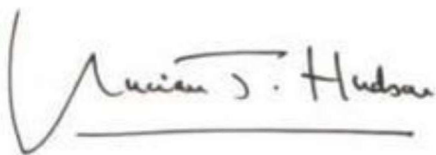
What distinguishes us as Tavistockians is an enduring love of human challenge. The way we use Tavistock Institute approaches and methodologies helps to turn tension and conflict into opportunity, avoiding the temptation that modern life brings- a rush to judgment and rush to action.

Over the years, I have seen how international the Institute has become. We draw on different backgrounds and develop more meaningful and productive relationships, thereby realising potential that can be an influence for good.

What resonates most to me in all the pages of this report is that exceptional combination of creativity, compassion and courage that defines our approach to our work.

Unlike many of our consultants and researchers, I do not travel as much as I did. But one visit this year lifted my spirits no end. In working with business leaders in Finland, I found out more what the Finnish concept of *sisu* means to its people. *Sisu* can be understood as strength of will, determination and perseverance. It is about acting in the face of adversity. *Sisu* is indeed about courage, but crucially it is the ability to sustain that courage.

As we conclude one year and embark on another, I am led to hope that we can continue to harness that indefatigable spirit that sustains our Institute, and we work together, more mindful than ever to make that difference that we are renowned for.

A handwritten signature in dark ink, reading 'Lucian S. Hudson'. The signature is written in a cursive style with a large initial 'L' and a horizontal line underneath the name.

6 February 2025

Create the future: arts and organisations programme

The Arts and Organisation programme of work remains concerned with action research questions: 'What do we learn when we rigorously integrate artistic, sensory and embodied approaches into Tavistock traditions? How might practices concerned with social change evolve to create the future?'

This year has seen several developments in this area of work:

- The completion of projects (PARCS Grows Everybody) elaborated below;
- The third exhibiting season of Deepening Creative Practice with Organisations offered a mokumentary called Kurat, written and performed by participants and faculty;
- Juliet Scott became editor-in-chief of the Organizational Aesthetics journal with a reflective opening editorial on ritual, spirals, objects and the chair;
- The stream 'Art and Re-evaluation' was convened at the Art of Management & Organisation conference, Nancy, France, August 2024;
- The Creative Digital Futures Lab, launched to imagine, practice and sustain digital futures through participative action research and artistic interventions;
- Doctoral research in ['Relational Practices and the TIHR Archive'](#), also nurturing a creative partnership with the Centre for Dance Research at Coventry University.

Nurturing the future through an activist organisation's legacy

2024 saw the successful completion of the oral history project, PARCS Grows Everybody, funded by the National Lottery Heritage Fund in 2022.

The aim of the project was to celebrate the history and legacy of the Portsmouth Abuse and Rape Counselling Service (PARCS) whilst developing skills in a new generation of activists challenging violence against women and girls (VAWG) and awareness raising in the sector.

The project was a partnership with Portsmouth History Centre, Aspex Gallery and filmmaking CIC Form and Function.

PARCS Grows Everybody pioneered new methods of relational oral history practice with the Young Feminist Collective at the centre of the work. These included trauma informed practices recorded in the History Safe Toolkit, such as working with consent, time as a safe container and awareness of the field. Other manifestations from the work included a Documentary Film, a launch event, co-curated exhibition and learning programme at Aspex Gallery.

The oral histories are now held at Portsmouth History Centre and learning has also been shared with the National Heritage Lottery Fund policy and implementation team, offering new and best practices for collaborative intangible heritage projects.

Sustain society and the planet: research and consultancy

This year we took purposeful steps towards reducing our environmental impact, growing our portfolio of projects in the climate space, and engaging staff and board members in collective decision making about the priorities, targets, and actions.

Following our well-established environment policy and our ongoing improvements efforts managed through the ISO 14001 we have taken several key steps towards our environmental goals.

Through a series of whole staff events, we agreed our net zero target of 2035, undertook our baseline carbon footprint assessment, and became early signatories of the Concordat for the Environmental Sustainability of Research and Innovation Practice <https://wellcome.org/who-we-are/positions-and-statements/environmental-sustainability-concordat>.

Meanwhile we embarked on a series of commissioned projects related to human dimensions of the environment and climate change, for example. The Scottish government commissioned us to undertake an evidence review of the connection between climate change and mental health and wellbeing. We have been exploring the direct effects of, for example, extreme weather as well as the psycho-social responses to awareness of climate change itself – sometimes described as eco-distress.

In addition, the Scottish government commissioned us, along with partners at the University of Edinburgh, to support their efforts to conceptualise and evaluate their Just Transition policy. The goal is to avoid the social and economic damage experienced during de-industrialisation in the 20th century and promote just outcomes as the country decarbonises. We have worked with a wide range of stakeholders to develop a national level theory of change and have begun to identify possible indicators and data-sources for future tracking of progress.

Research on neurodiversity in the tech sector

In parallel to our work on the human dimensions of climate change, we continue to explore how the social and organisational contexts in which we work and live can enable us to thrive.

The #ChangeTheFace Alliance commissioned us to conduct a global study on neurodiversity in the tech industry, which was completed in 2023. #ChangeTheFace is a collaborative initiative uniting leading global tech companies, since 2021, to champion diversity, equality/equity, and inclusion within the tech industry. Four companies from the Alliance took part in the study: Colt, Nokia, Samsung, and Vodafone.

Working with global leaders of the tech industry, the study explored the intricate

social dynamics within company culture and workplace systems that impact neurodivergent individuals' experiences.

The research incorporates findings from the largest global workplace survey on neurodiversity to date in the tech sector. This revealed that nearly half of neurodivergent employees feel impacted by their neurodivergent conditions on most days in the workplace. The study highlights key challenges for neurodivergent employees and improvements in the workplace environment, culture and systems that would make workplaces more accessible and inclusive.

Since we published the study with #ChangeTheFace, Vodafone have [publicly announced](#) accessibility measures for neurodivergent applicants to make their “hiring process more inclusive.”

Omved Gardens: Human Centred Ecology

Omved is a garden, exhibition and educational space in North London exploring food, creativity and ecology for health and climate resilience. Towards the end of 2023 TIHR organisational consultants were approached by Omved to facilitate their end of year review process and provide support as the team work towards significant organisational change and a journey of transformation.

The interest in the Tavistock Institute was two-fold:

- to build on a formative experience attending Leicester Conference which challenged Omved's founder to reconsider their role and leadership of the garden space;
- an intrigue from one of Omved's gardeners in the ecological relevance of social dreaming, the unconscious and group relations and an enquiry around the garden repurposing into a more community and educational context.

The terrain: how to successfully navigate leadership through internal and external ideals.

The work began by exploring rhythm and task in relation to seasonal cycles which then led to dynamic intergroup work on the nature of relations between different parts of the organisation and some individual role analysis work.

With a major building project in process and ambitions to make space for a seedbank and more public involvement in the garden, the organisational development work will continue forward. One aim is to develop more capacity to inclusively manage the boundaries between the garden space and the wider community.

Strengthen me, my group, my organisation: research and consultancy

Supporting social care practitioners

To enable leadership development and productive systems change in the UK's social care sector, we began a programme of work with children's services departments across the country, with partner Frontline, England's largest social work charity, to improve the practice skills of social care practitioners in a range of settings.

With Oldham Children's Services, for example, we began a redesign of their induction for all staff for systemic family therapy approaches in social work. This involved a refreshed package of training and *train the trainer* sessions to ensure the new approach is embedded in the organisation.

With Sandwell Children's Trust, we are focused on the development of motivational interviewing skills across the workforce. We started a programme of training for 300 practitioners in motivational interviewing techniques, and a *train the trainer* work package to ensure the new ways of working are established moving forward.

A sojourn with the University of Westminster

Our work with organisations is at its heart is a partnership. We consider ourselves sojourners, which the Cambridge dictionary describes as a temporary resident who accompanies through various stages of work, progression and challenges.

Within that frame, we have been working with our colleagues at Westminster University. Over several years, there have been many iterations to our partnership.

Our Supervision for Coaches and Consultants was the first interaction as two members of staff joined the programme, which led to a request for supervision for a series of internal complex action learning sets that were to be offered. It was a rich and developmental partnership resulting in the publication of the book *Towards the Compassionate University*, including an article from one of the Tavistock Institute staff members.

Other work in the University includes delivery of the Self Leadership programme, designed to support young people to explore their identity and how they enter the world of work. In addition, we have accompanied one of the departments in transition and offered supervision for a key support function of the university. It has been a rich and rewarding relationship.

Our work with the University continues to emerge.

Enabling transformation in a European bank

Following the merger of four government agencies in this north European country, a national development bank sought our input to update its strategy and values.

The first and most important step was to explore the bank's change perspective over time. We encouraged the client to think ahead at least 18 months, beyond our involvement, to enable the high level of alignment and tight cooperation that is crucial in culture change projects.

The bank planned to invest seriously in exploring the current culture, looking at the whole and at the four subcultures brought in by the four different agencies. We facilitated diverse groups of employees at every level to discuss current culture strengths and challenges, revealing hidden roadblocks as well as assets. For example, high levels of professionalism emerged as a strength but also a barrier to effective collaboration across different sectors within the bank.

Working across the organisation, we were able to articulate new values and behaviours, subsequently approved by the Board. There was a high level of energy in the search for values and much curiosity in the final result, reflecting the involvement of people from different levels and places in the organisation. They felt the new values expressed what they were voicing.

In the implementation stage, we created a change methodology and delivered training for Culture Ambassadors, who will help to discuss and make sense of the new values in different parts of the organisation.

We will continue to encourage free flowing conversations and sense-making at quarterly reflections in community meetings with Values Ambassadors and the Board, where they will reflect on change, voice the difficulties and celebrate the wanted changes. We are very lucky to work with clients like this – persistent, daring, brave – while diving into the unknown and trusting the wisdom they have inside their organisations.

Joining the dots in local networks: reducing problem gambling

The national charity GambleAware is working with us to reduce harm through problem gambling. The overall goal is to strengthen local and regional support for people at risk of gambling-related harms. As learning and evaluation partner, the Institute is engaged in promoting multi-agency collaboration between national, local, and regional stakeholders across nine regional and national boards, through:

- **Conversation:** we connect the National Gambling Support Network (NGSN) and voluntary community services, local authorities, primary care services, Citizens Advice, and grassroots organisations.
- **Participation and creativity:** we are creating action-learning-guided events to build cross-board relationships, exchange insights, and cultivate a supportive learning community for the duration of the programme and beyond.

- **Multi-disciplinary and evidence-led team working:** we offer expertise in research/evaluation methods, leadership and organisation development, social care, lived experience, and systems change, enabling us to co-produce knowledge alongside local partners working in complex local, regional, and national economies.

FOCUS: Reflective practice in the NHS

Camilla Child has worked with perinatal parent infant mental health teams since July 2018. She currently runs five monthly reflective practice groups for multidisciplinary teams in the community mental health sector across three different NHS Trusts.

Q: Why do you see reflective practice as important?

A: These specialist community teams focus on supporting people who experience mental health difficulties and cases are complex. Reflective practice provides multidisciplinary team members the space to reflect on and share the impact their work has on themselves and on their teams and how they work together across the boundaries of their team disciplines, with acute services, and in some cases across geographical boundaries.

Q: What form do the sessions take?

A: We meet for an hour, or just over, depending on the team, once a month, either always online, always face-to-face or a mixture of these, in turn. Numbers attending range from 25 to three.

Q: What can be achieved in such a short time, often with so many people present?

A: Often different people come each time and I sometimes think: can we go beyond 'connecting with each other' conversations, essential as they are for teams that rarely see each other together (except in business meetings)? We do manage it though, through the courage of the individuals to bring their experiences to the session and the curiosity and empathy of their colleagues.

Q: What are the sessions like?

A: They aren't always comfortable! But they can be variously moving, frustrating, and challenging for us all, with issues raised that relate to uncomfortable team or management dynamics.

Q: Camilla, what is your part in the success of these sessions?

A: I've worked hard over many years to develop 'safe enough' environments, where my understanding of unconscious group dynamics, of organisations and systems all come together with my facilitation skills to run these sessions with compassion and challenge.

Tavistock Institute Germany (TIG)

Research and organisational development in Europe

Since moving Tavistock Institute Germany to Berlin in 2023, we have connected with local organisations and key stakeholders to build a solid presence in Berlin and foster potential collaborations for future projects.

Looking ahead, we secured funds from Horizon Europe to focus on how artificial intelligence (AI) tools can improve the design and implementation of active labour market policies (ALMPs) across the EU. The new project will kick off in January 2025.

Our primary client this year was the European Union and its bodies, where we have strong, ongoing partnerships through our expert team. Our main work in 2023-24 included vocational education and training initiatives for CEDEFOP (European Centre for the Development of Vocational Training). These two programmes demonstrate TIG's contribution to the understanding of vocational education initiatives across the EU's member states.

Promoting lifelong learning of adults through CVET systems and upskilling pathways

In the past year, we successfully completed this Cedefop project which focused on the identification of approaches and strategies across the EU that can inform more effective future continuing vocational education and training (CVET) systems across the EU.

Adopting a lifelong learning approach, these are expected to contribute towards building responsive, sustainable and inclusive European labour markets.

TIG led the Work Assignment focused on scenario building as regards desired future(s) for CVET, especially in view of the EU's green and digital transitions.

On 8th November 2023, under the auspices of Cedefop, TIG organised a major conference in Brussels where both TIG and Cedefop staff presented the results of the project to key EU level stakeholders, such as the European Commission, European Parliament, EU social partners (employer associations and trade unions), EU sectoral social partners and EU level associations.

Ensuring transparency and facilitating transferability of learning outcomes; analysing and assessing two decades of European and national initiatives

This Cedefop project aims to analyse and evaluate policy efforts to increase the flexibility of European education, training and learning systems, in the last 20 years at both EU and national levels.

Over the past year, we focused in particular on changes in lifelong learning for individuals, comparing the situation in 2000 with that in 2020. We carried out three in-depth national case studies in Germany, Ireland and France respectively, and contributed to the finalisation and quality assurance of the Cedefop final report.

Meanwhile we used scenario-building techniques to inform future policy options. The key question we are addressing is whether European and national initiatives on transparency and transferability of learning outcomes over the past 20 years have been successful in improving the flexibility and permeability of education, training and learning systems.

On 21st February 2024, we presented findings at a Cedefop-organised workshop with 200 stakeholders from across the EU, European Commission, UNESCO and the ILO.

Group Relations

The Group Relations programme continues to thrive globally. With the Leicester Conference at the helm, we are supporting organisations and initiatives across the world applying the Group Relations methodology.

People attend Group Relations Conferences (GRCs) to deepen their understanding – through experiential learning – of the forces and factors that influence and shape groups, organisational and social dynamics both consciously and unconsciously. This method is now well established globally, and Institute staff continue to contribute and innovate it.

International Group Relations Programme

We co-sponsored and staffed these Group Relations Conferences (GRCs)

In-person GRCs

Trinidad and Tobago, October 2023 with Caribbean Group Consulting
New York, November 2023 with Teachers College, Columbia University
Kazakhstan, April 2024 with Group Relations Kazakhstan
Italy, Crotone, March 2024 with Il Nodo Group
Greece, Thessaloniki, May 2024 with the International Psychoanalytic Association
Italy, Lake Como, June 2024 with Il Nodo Group
Lithuania, Vilnius, August 2024 with Lithuanian Group Relations Society and Vilnius University

Online GRCs

February 2024 with The New York Centre for the Study of Groups, Organizations, and Social Systems with the A.K. Rice Institute
April 2024 with SIOPSA in South Africa
September 2024 with Partners in Confronting Collective Atrocities

FOCUS: The Leicester Conference 2024

Task Authority Organisation: Studying Stuckness, Movement and Hope

This year, the 78th Leicester Conference returned to Moor Hall in Sussex for the second time. The conference had 11 staff and 49 members, with six of those in the Deepening Praxis Training Group, and 43 members in the Emerging sub-conference.

Each point of transition during this conference was characterised by a deep, existential challenge at either the level of the individual, the group or the wider system – and at whichever level it had reverberated throughout the conference.

These transitions were all marked by much potential and sometimes manifested

anxiety, a need to think on the feet and be able to negotiate with various systems.

All had elements of urgency to them, requiring the capacity to work across boundaries in role, staying sympathetic and alert to the impact on members, staff, and venue staff.

Throughout, we navigated the wider UK and global context's inflexible – sometimes bureaucratic – systems, whilst bearing in mind the context of a GRC which is experiential, here-and-now, and deals with the projective and introjective field where myths, fantasies and the potential to act out are rife.

Robust leadership and collective management were evident alongside the challenges and unconscious responses to what was largely a female-led enterprise.

Throughout the conference the discourse evolved around female leadership because of these challenges, and prompted by the introduction in the brochure, which was about mothers, mothering and wearing 'rose-tinted' glasses. However, eventually it was acknowledged that the conference was well-led – regardless of the gender or sex of the staff, and that speaking in terms of female or woman leadership might be reductive.

The impact and contribution of the conference design

The classic GRC structure remains important for the conference directorate: the here-and-now events of Small Study Groups, Large Study Groups, different 'types' of Inter-group events and Review & Application Groups were all used.

During the first week we held the inter-group event TAO, named after the first part of the conference's title, Task Authority Organisation. Here, members of the Deepening Praxis Training Group were offered opportunities to pair up with a staff consultant and join them in consulting to the membership during the rest of the event.

During the second week, the afternoons were dedicated to a system-wide event which we named this year SHAME. The acronym was based (initially unconsciously) on the second part of the conference's title: **(Studying) Stuckness, Hope and Movement Event**. The event, like the rest of the conference, was intense and full of learning.

Groups created based on the Primary Task and in relation to the title to explore within themselves and in relation to other groups: 'envy', 'shame', 'power', 'risk in belonging', 'conflict & difference', 'working loose' and 'invisible no more'. The group names are always fascinating as they echo and reflect the experiences within the groups as well as the fantasies (relatedness) or experiences (relationships) to the conference management as well as to the event management.

The staff divided into two arms in the SHAME: management and consultancy. The management of the event consisted of the conference directorate, a seat for the manager of the consultants (when she wasn't in the consultants' room) and two chairs for members which were available on a first-come-first-serve basis for one session per person.

We had another event called BODE (bear-or-dare-event) with 4 sessions (twice in the first and twice in the second week) which was an invitation to offer sessions related to body, mind and spirit – exploring other ways of learning and accessing wisdom through the whole self, rather than the usual talking.

The staff were asked to provide a 'skeleton' so there was always something to go to: 'yoga and yoga Nidra'; '5 rhythms dance'; 'social dreaming matrix'; 'social photo matrix' and 'meditation'. In addition, the members offered 'dancing in the rain', 'walks to the river and a hill', and a series of 'drama workshops'. This event has historically been known for people absenting themselves, as it progresses – this did happen to a certain extent, but rather less than previously.

We thought this might have been due to the design which encouraged, and role-modelled, responsibility and ownership of initiatives. Each session facilitator was enthusiastic about their session, spent much time preparing for it, and made sure to have colleagues sharing in the load of delivering it.

Professional development, learning and coaching

During the year reported, our Professional Development offer has included our modular programmes, shorter workshops and ad-hoc courses, all based on core Tavistock philosophies, theories and methodologies and adapted to what is being called forth from the field: our participants, communities and wider society.

The programmes are about delivering fundamental lasting change for participants and by extension their organisations, rather than quick fixes; bringing cohorts together to discuss what it means to work in today's ever-changing world. To this end we continued to deliver programmes in many different modes – wholly online, wholly in-person and in hybrid, making best use of our technology to allow participants to connect across the globe.

Our cohorts were truly international in this reporting period, with participants from over 30+ countries joining us in our London office and online. Our office continues to provide a flexible and bright space that encourages learning but also supports informal conversations and networking – a core part of the Tavistock Institute programme.

In 2024 we made changes to some of our suppliers to greener, more environmentally friendly providers in keeping with our mission to reduce our carbon footprint and be kinder to the planet.

New short programmes

We have launched two new short-form programmes – our **Spring Workshop Series: Writing with the Poetic Lens** and **Strategic Leadership Circles**. Our Spring Workshop Series – a three-session series designed for professionals who seek new ways of writing about their work and practice took place with nine participants who used sample texts and peer review to expand their professional (and personal) writing practice.

“The programme was great and facilitated skillfully. I appreciated the range of materials with which we engaged and the exercises helped me stimulate my thinking around my own projects.”

Programme Participant, 2024

Strategic Leadership Circles provided a safe space for healthcare professionals to discuss and explore questions around leadership, personal strengths and career planning with fellow peers who understand the pressure of the healthcare environment.

Both programmes were delivered in conjunction with our Associates and we're pleased the programmes will continue into 2025.

Tavistock Institute China

We were very pleased to return in-person to China in 2024, after a long break since the pandemic hit us in 2020, and together with Tavistock Institute China colleagues, we launched cohort 3 of the Green programme which had an enthusiastic group becoming Group Dynamicians on this re-designed modular programme during 2024.

Online learning

In mid-2024, our online learning course ***Team Working: How to succeed*** passed 1,000 joiners on the FutureLearn platform. This 5* rated course introduces Tavistock methodologies, including BART, group dynamics and systems thinking. For some of our joiners, we hope the next step is experiencing our programmes in-person.

Knowledge sharing and community building

Human Relations Journal

This was another great year for our journal, *Human Relations*.

The 'Journal Citations Report' (JCR) which ranks all journals within a specific specialism, lists *Human Relations* in the top quarter of both the Management JCR and the Social Sciences JCR for the first time in the journal's long history.

2023/24 also saw the largest number of submissions we've ever had at 1,415 submissions – we accepted 3% of these articles. We continue to be healthily read by our audience with over one million downloads, making us one of the top downloaded journals that Sage publishes.

In 2024 a new Co Editor-in-Chief joined our team, Professor Penny Dick of Sheffield University Management School – welcome to the team, Penny! On behalf of everyone at *Human Relations* we give thanks to our other Co- Editor-in-Chief, Professor Smriti Anand, our international Associate Editor team, our Editorial Board, our Editorial Assistant team at Editorial Office and our publishers, Sage Publishing.

We'd also like to acknowledge our reviewers, without whom we could not run such a successful journal. A special thanks to our Reviewer of the Year 2024, Dr Melika Shirmohammadi. You can find out more about the journal by visiting our webpage, <https://www.humanrelationsjournal.org/>

Interesting articles published in 2024 include topics around power, inclusivity, oppression, transparency, gender and many more – all in and around the workplace. All our published issues and online first articles can be found online and many are open access or free to download.

Organisational Aesthetics Journal

The Institute, with Juliet Scott as the incoming editor-in-chief, became a publishing partner with the Art of Management and Organisation in hosting and editing the Organisational Aesthetics journal. The aim is to bring more of a practitioner focus to the journal and to complement the TIHR arts and organisation programme through publishing new artistic practices and research as well as collaborating with new communities of practice through the AOMO network.

Lunchtime talks

The Institute continues to run our 'Food for Thought Lunchtime Talks' series - a vibrant, interactive series of events taking place online, in-person and in hybrid form.

These monthly talks are a platform for engagement with a varied and wide public audience, giving opportunities for knowledge sharing, gathering of feedback, and network building. Each talk has an average audience of 50, with a mix of online and in-person attendees.

The talks are free to attend, with an option to make a donation towards our Professional Development Bursary Fund.

Speakers this year

- Institute staff Elyce Cole, Dave Drabble and Anna-Sophie Hahne, speaking about their 'Neurodiversity at work' study for #Changetheface alliance;
- Professional partners Franca Fubini and Susan Long from the Social Dreaming International Network (SDiN);
- The Institute's collaborative doctoral artist-researcher Heni Hale, sharing some of her embodied work with the Institute's archive.
- Graduating students from the Tavistock & Portman NHS Foundation Trust's D10D programme in 'Advanced practice and research: consultation and the organisation'.

Tavistock Community

The Tavistock Community is a self-organising trans-cultural community network for Tavistock thinking. The primary task of the Community is to connect with others, exchange ideas, develop practice, expand learning and think together, all underpinned by Tavistock methodologies. It is like a Garden, where initiatives are self-led and followed, launching from different parts of the world.

The period from 1 October 2023 to 30 September 2024 marked a time of fallow, rest, sabbatical and mourning for the departure of one of our members. The Seventh Year of The Tavistock Community was like a Seventh Day, but also a year of shock and grief, caused by the unfolding tragedies in lands around the world. Our response, *Many wars, One Peace – Many lands, One Home*, a series of meetings around current conflicts, culminated in an experiential online event with the same title on 19 February 2024, followed by an article published in *Kav OFEK Journal*. Along with *What are we holding for Leicester 2024?* and *Leicester 2014, 10-year RAG*, the mindful journey of Still Together and other projects from previous years, continued to evolve.

Alumni and Friends may apply for membership [here](#).

Communications and engagement

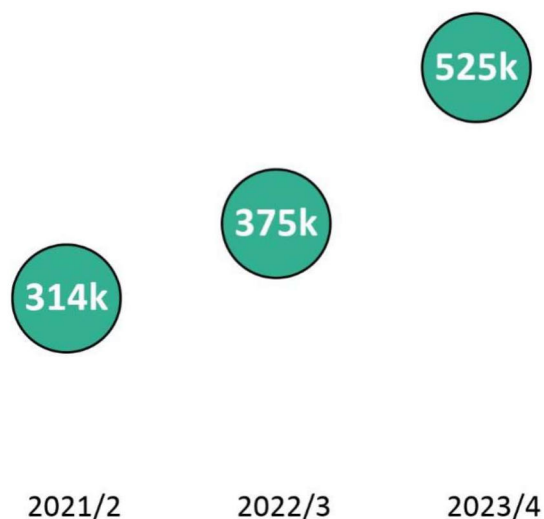
This was a year of consolidation following the introduction of our new website and brand identity in 2022/23 and we developed a new easy to use brand guide for all external communications. We renewed strategic networks with our core audiences and marketed services and events to existing and new audiences and potential partners and clients, primarily via the website, our email subscribers (now at 4,500 in number) and our highly active LinkedIn communities.

Significant new sections were added to the website, covering our methods, publications and podcasts and a selection of insights into current work, in response to user requests ascertained via a summer electronic survey.

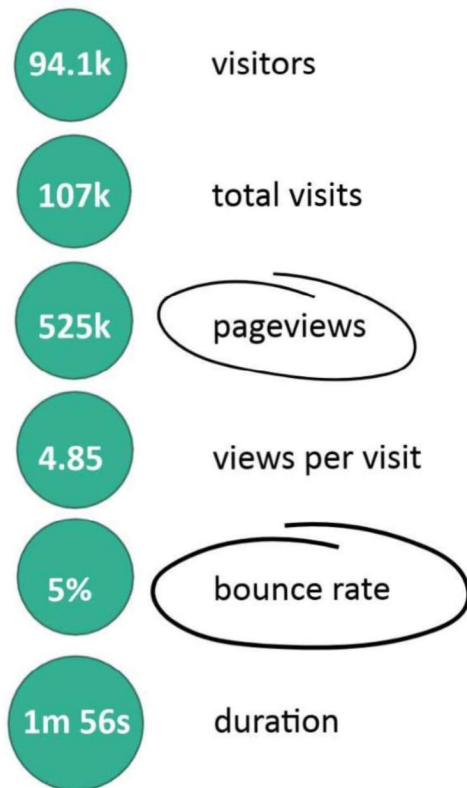
Website

Visitor rates to the website remained stable, and we intend to expand our constituency into new markets and fields in 2024/5. Encouragingly, we have seen dramatically improved pageview rates over this last year. Very low bounce rates indicate that visitors are exploring and finding engaging material on the site once they arrive.

Website pageviews (000s, over three years, Plausible data)



Website data (1 Oct 2023 to 30 Sept 2024, Plausible)



LinkedIn and social media snapshot

Meanwhile we saw follower numbers and engagement rates climb steadily across our social media channels, reflecting interest in our news, comment and updates across LinkedIn, Facebook, Instagram and X and a focus on authenticity, value and engagement as defined in our Communications Framework.

In terms of driving audiences to our services, LinkedIn was by far our most effective channel, with 5.2k visitors to our site. Our monthly news updates via Campaign Monitor, which achieve close to 50% open rates each issue, sent 4.1k visitors to our site, our updated Wikipedia pages sent 2.5k and Facebook 861.

Followerships

2023/4: 11.4k on LinkedIn profile, 8k on LinkedIn business, 7.4k on Facebook, 6.6k on X, 1.1k on Instagram. **2022/3:** 6.9k followers on LinkedIn, 6.6k on Facebook and 6.7k on X.

Organisational structure of the Institute and decision-making process

As of 2024, the Council holds four meetings a year, plus a fifth dedicated to its development, in the form of an away-day. The CEO provides an update to the trustees at each of the Council meetings. This includes a status update on the key projects and other significant events. An update of the financial status of the Institute is also reviewed at each meeting. Further, the Council has a rolling programme which covers the key activities of the Institute over the course of twelve months.

In addition, the following sub-committees are in operation:

- The Legacy Pension Fund trustees meet 2-3 times a year and are responsible to the legacy pension fund. Currently we have two pension fund-nominated pension trustees and two employer-nominated pension trustees.
- The *Human Relations* Management Committee (HRMC) meets twice a year to discuss and review the activities of the HR journal.

Internally, the CEO holds bi-weekly management meetings.

Salary progression reviews are carried out annually and are normally based on the performance of staff members and business context. All staff are positioned organisationally in a range of salary bands which are directly related to their roles and grade. The bands are as follows: R – Researcher, S – Senior and P – Principal. The difference in grade reflects seniority of knowledge, experience and workload. The majority of the principal grade employees are line managed by the CEO. All Line managers make a recommendation to the Chief Executive and Head of Finance of any increase in salary, performance bonus and/or cost of living allowance, following the annual review of their line managees. This is confirmed as both reasonable and affordable by the Head of Finance. The CEO's salary is reviewed independently by the Council either through convening a remuneration committee or the nominations committee acting as the remuneration committee. For 2023/24 all salaries were frozen given the financial challenges as outlined in the Financial Review.

Financial Review

Financial Results for the year 2023/24

The Institute generated an operating deficit of c.-£360k inclusive of FRS102 related pension costs vs a surplus of £248k in 2022/23. This represents a very disappointing year financially given the performance of the Institute over recent years which has generated an annual operating surplus. A number of factors contributed to the deficit including the reduction of income from royalties, a lack of new project work being won impacting billable time and a number of professional development programmes recruiting lower than optimal levels.

However, the Institute benefited from actuarial gains related to the defined benefit pension scheme of £396k which helped offset the operational deficit and resulted with the overall movement in funds at £36k (2022/23: £682k). The previous year's surpluses that contributed to the unrestricted fund in the balance sheet have been eroded as result of the operating deficit achieved in 2023/24. The Institute's challenge going forward is to rebuild its unrestricted reserves through operational and strategic goals as set out by the Chief Executive Officer.

The accounts for 2023/24 included a deficit by the Institute's subsidiary, Tavistock Institut gGmbH, which continues to look to increase its portfolio of project work with research and evaluation as well as consultancy.

The Institute's income from project activities income for the year was significantly lower than last year's performance. However, the Institute did see a rise in Professional Development income, although this was lower than forecasted. Royalties' income from *Human Relations* were as expected reflecting the continued challenges of Open Access on academic journals.

The Institute managed to minimise the level of deficit by reducing costs where possible through cost savings and tight controls on expenditure. Cashflow was also impacted by the lower levels of income but has been actively managed to ensure payment obligations were met.

The Institute continues to hold a provision of £117,585 at the end of September 2024 for potential costs related to its membership of the Menon Network EEIG following the bankruptcy of a fellow member of the EEIG and which will impact the EEIG and its members.

The Institute, to be prudent, is retaining the provision to cover any further payment settlements related to EEIG projects.

Reserves policy

The Trustees recognise the need to hold reserves both to enable the Institute to progress its long-term projects and to protect its current activities. The Institute believes that a reserves level of three months' income is appropriate for the ongoing operations of the organisation.

Of the accumulated reserves on 30 September 2024 of £44,834 (excluding the pension fund liability), an amount of £63,076 is invested in operational assets. This resulted in the unrestricted free reserves at -£18,245 and therefore below the three months level of reserve required. The Institute believes this will return to normal levels subject to the Institute returning to normal levels of operating surpluses.

The Institute continues to fulfil its agreement as per the revised pension recovery plan agreed in early 2024 with the pension trustees (approved by the pensions regulator) whereby the deficit will be paid within 8 years. During the year ended 30 September 2024 the Institute paid £348k in accordance with this plan. The actuarial valuation of the Tavistock Institute of Human Relations Retirements Benefit Scheme at 30 September 2024 for the purposes of FRS102 showed a decreased funding deficit of £220k (2022/23: £924k). This represents a further reduction that the Institute has seen over last few years driven by various market conditions and underlying assumptions.

Risk management and internal control

The Trustees have a duty to identify and review the strategic, business and operational risks that the Institute is exposed to, and to ensure that appropriate controls are in place to provide reasonable assurance against fraud and error.

In order to achieve this, the Trustees and management team have undertaken an assessment of the risks that the organisation is exposed to and have produced a risk register which assigns management of these risks to specific individuals and recommends actions to be taken, where necessary, in order to manage the likelihood and impact of these risks. The risk assessment and resulting risk register are reviewed and updated on a regular basis.

The most up to date review, in May 2024, confirmed the current primary risks included depletion of the Institute's reserves and cashflow due to operating deficit risks partly driven by challenging markets conditions due to ongoing economic uncertainty and volatility impacting opportunities in the UK, Europe and the rest of the world. We continue to monitor staff numbers to ensure capacity is maintained and scalable to support current and future activities and opportunities.

Appointment of Auditor

Goldwins Limited, Chartered Accountants, have agreed to continue their appointment as external auditor.

Audit Information

Each of the directors has confirmed that so far as they are aware, there is no relevant audit information of which the company's auditor is unaware, and that they have taken all the

steps that they ought to have taken as a director in order to make themselves aware of any relevant audit information and to establish that the company's auditor is aware of that information.

Statement of trustees' responsibilities for an incorporated Charity

The trustees (who are also directors of the Tavistock Institute of Human Relations for the purposes of company law) are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

Company 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 charitable company and of the income and expenditure of the charitable company for that period. In preparing these financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgments and accounting estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in business.

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

In so far as the trustees are aware:

- there is no relevant audit information of which the charitable company's auditors are unaware; and
- the trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

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

BY ORDER OF THE COUNCIL

Opinion

We have audited the financial statements of Tavistock Institute of Human Relations (the 'Charity') for the year ended 30 September 2024 which comprise the consolidated Statement of Financial Activities, the group and parent Charity's Balance Sheets, group's statement of cash flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

Opinion on financial statements

In our opinion the financial statements:

- give a true and fair view of the state of the group's and Charity's affairs as at 30 September 2024 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- have been prepared in accordance with the requirements of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the charity's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the directors with respect to going concern are described in the relevant sections of this report.

Other information

The trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Opinion on other matter prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- the information given in the trustees' report (incorporating the directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the trustees' report (incorporating the directors' report) has been prepared in accordance with applicable legal requirements.

Matters on which we are required to report by exception

In the light of the knowledge and understanding of the Charity and its environment obtained in the course of the audit, we have not identified material misstatements in the Trustees' Annual Report.

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

Responsibilities of the trustees

As explained more fully in the Trustees' Responsibilities Statement, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view and for such internal control as they determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

Our responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud are set out below.

In identifying and assessing risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, our procedures included the following:

- We enquired of management, which included obtaining and reviewing supporting documentation, concerning the charity's policies and procedures relating to:
 - identifying, evaluating, and complying with laws and regulations and whether they were aware of any instances of non-compliance;
 - Detecting and responding to the risks of fraud and whether they have knowledge of any actual, suspected, or alleged fraud;
 - The internal controls established to mitigate risks related to fraud or non-compliance with laws and regulations.
- We inspected the minutes of meetings of those charged with governance.
- We obtained an understanding of the legal and regulatory framework that the charity operates in, focusing on those laws and regulations that had a material effect on the financial statements or that had a fundamental effect on the operations of the charity from our professional and sector experience.
- We reviewed the financial statement disclosures and tested these to supporting documentation to assess compliance with applicable laws and regulations.
- We performed analytical procedures to identify any unusual or unexpected relationships that may indicate risks of material misstatement due to fraud.
- In addressing the risk of fraud through management override of controls, we tested the appropriateness of journal entries and other adjustments, assessed whether the judgements made in making accounting estimates are indicative of a potential bias and tested significant transactions that are unusual or those outside the normal course of business.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [\[www.frc.org.uk/auditorsresponsibilities\]](http://www.frc.org.uk/auditorsresponsibilities). This description forms part of our auditor's report.

Use of our report

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charity's members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charity and the charity's members as a body, for our audit work, for this report, or for the opinions we have formed.

Anthony Epton
.....

12 February 2025

Anthony Epton (Senior Statutory Auditor)
for and on behalf of
Goldwins Limited
Statutory Auditor
Chartered Accountants
75 Maygrove Road
West Hampstead,
London NW6 2EG

The Tavistock Institute Of Human Relations

Consolidated Statement of financial activities (incorporating an income and expenditure account)

For the year ended 30 September 2024

For the year ended 30 September 2024					
		2024		2023	
	Note	Unrestricted £	Total £	Unrestricted £	Total £
Income from:					
Charitable activities	2				
–Research evaluation and organisational development		678,949	678,949	1,503,721	1,503,721
–Strategic growth		8,742	8,742	874	874
–Professional development		656,498	656,498	586,517	586,517
–Royalties from publications		638,595	638,595	819,269	819,269
		1,982,784	1,982,784	2,910,381	2,910,381
Tavistock Institut gGmbH income	13	226,600	226,600	254,191	254,191
Investments	3	12,050	12,050	10,568	10,568
Other	4	4,117	4,117	373	373
Total income		2,225,551	2,225,551	3,175,513	3,175,513
Expenditure on:					
Charitable activities	5				
–Research evaluation and organisational development		1,873,945	1,873,945	2,109,182	2,109,182
–Strategic Initiatives		8,664	8,664	14,610	14,610
–Professional development		301,187	301,187	345,270	345,270
–Royalties from publications		139,425	139,425	178,759	178,759
Tavistock Institut gGmbH expenditure	13	262,060	262,060	279,700	279,700
Total expenditure		2,585,281	2,585,281	2,927,521	2,927,521
Net income / (expenditure) before net gains / (losses) on investments		(359,730)	(359,730)	247,992	247,992
Net gains / (losses) on investments		–	–	–	–
Net income / (expenditure) for the year	6	(359,730)	(359,730)	247,992	247,992
Transfers between funds		–	–	–	–
Net income / (expenditure) before other recognised gains and losses		(359,730)	(359,730)	247,992	247,992
Actuarial gains / (losses) on defined benefit pension schemes		396,000	396,000	434,000	434,000
Net movement in funds		36,270	36,270	681,992	681,992
Reconciliation of funds:					
Total funds brought forward		(211,436)	(211,436)	(893,428)	(893,428)
Total funds carried forward		(175,166)	(175,166)	(211,436)	(211,436)

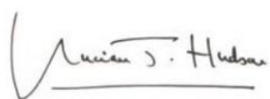
All of the above results are derived from continuing activities. There were no other recognised gains or losses other than those stated above. Movements in funds are disclosed in Note 19 to the financial statements.

As at 30 September 2024

		The Group		The Charity	
		2024	2023	2024	2023
	Note	£	£	£	£
Fixed assets:					
Intangible assets	11	45,729	58,816	45,729	58,816
Tangible assets	12	17,350	24,328	17,350	24,328
Investment	13	–	–	21,535	21,535
		63,079	83,144	84,614	104,679
Current assets:					
Debtors	14	491,794	648,431	491,794	648,431
Cash at bank and in hand		722,484	1,395,408	552,154	1,128,262
		1,214,278	2,043,839	1,043,948	1,776,693
Liabilities:					
Creditors: amounts falling due within one year	15	(1,232,523)	(1,414,419)	(1,105,785)	(1,226,322)
Net current assets / (liabilities)		(18,245)	629,420	(61,837)	550,371
Total assets less current liabilities		44,834	712,564	22,777	655,050
Creditors: amounts falling due after one year		–	–	–	–
Net assets excluding pension asset / (liability)		44,834	712,564	22,777	655,050
Defined benefit pension scheme asset / (liability)	17	(220,000)	(924,000)	(220,000)	(924,000)
Total net assets / (liabilities)		(175,166)	(211,436)	(197,223)	(268,950)
The funds of the charity:					
Unrestricted income funds:	19				
General funds		(175,166)	(211,436)	(197,223)	(268,950)
Total unrestricted funds		(175,166)	(211,436)	(197,223)	(268,950)
Total charity funds		(175,166)	(211,436)	(197,223)	(268,950)

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

Approved by the trustees on 6th February 2025 and signed on their behalf by



Lucian J Hudson, Chair



Eliat Aram, Ex-Officio Member

The Tavistock Institute Of Human Relations
Consolidated Statement of cash flows

For the year ended 30 September 2024

	Note	2024	2023
		£	£
Cash flows from operating activities	20		
Net cash provided by / (used in) operating activities		(672,974)	(298,755)
Cash flows from investing activities:			
Dividends, interest and rents from investments		12,050	10,568
Proceeds from the sale of fixed assets		–	–
Website cost		–	(43,280)
Purchase of fixed assets		(12,000)	(4,464)
Proceeds from sale of investments		–	–
Purchase of investments		–	–
Net cash provided by / (used in) investing activities		50	(37,176)
Change in cash and cash equivalents in the year		(672,924)	(335,931)
Cash and cash equivalents at the beginning of the year		1,395,408	1,731,339
Change in cash and cash equivalents due to exchange rate movements		–	–
Cash and cash equivalents at the end of the year	21	722,484	1,395,408

1 Accounting policies

a) Basis of preparation

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 (FRS 102 – effective 1 January 2015) – (Charities SORP FRS 102) and the Companies Act 2006.

The charitable company meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy or note.

b) Going concern

The trustees consider that there are no material uncertainties about the charitable company's ability to continue as a going concern. The trustees do not consider that there are any sources of estimation uncertainty at the reporting date that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next reporting period.

c) Income

Income is recognised when the charity has entitlement to the funds, any performance conditions attached to the income have been met, it is probable that the income will be received and that the amount can be measured reliably.

Income from government and other grants, whether 'capital' grants or 'revenue' grants, is recognised when the charity has entitlement to the funds, any performance conditions attached to the grants have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

For legacies, entitlement is taken as the earlier of the date on which either: the charity is aware that probate has been granted, the estate has been finalised and notification has been made by the executor(s) to the charity that a distribution will be made, or when a distribution is received from the estate. Receipt of a legacy, in whole or in part, is only considered probable when the amount can be measured reliably and the charity has been notified of the executor's intention to make a distribution. Where legacies have been notified to the charity, or the charity is aware of the granting of probate, and the criteria for income recognition have not been met, then the legacy is treated as a contingent asset and disclosed if material.

Income received in advance of the provision of a specified service is deferred until the criteria for income recognition are met.

d) Donations of gifts, services and facilities

Donated professional services and donated facilities are recognised as income when the charity has control over the item or received the service, any conditions associated with the donation have been met, the receipt of economic benefit from the use by the charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), volunteer time is not recognised so refer to the trustees' annual report for more information about their contribution.

On receipt, donated gifts, professional services and donated facilities are recognised on the basis of the value of the gift to the charity which is the amount the charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

e) Interest receivable

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the charity; this is normally upon notification of the interest paid or payable by the bank.

f) Fund accounting

Restricted funds are to be used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund.

Unrestricted funds are donations and other incoming resources received or generated for the charitable purposes.

Designated funds are unrestricted funds earmarked by the trustees for particular purposes.

1 Accounting policies (continued)

g) Expenditure and irrecoverable VAT

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

- Costs of raising funds relate to the costs incurred by the charitable company in inducing third parties to make voluntary contributions to it, as well as the cost of any activities with a fundraising purpose
- Expenditure on charitable activities includes the costs of delivering services, undertaken to further the purposes of the charity and their associated support costs.
- Other expenditure represents those items not falling into any other heading

Irrecoverable VAT is charged as a cost against the activity for which the expenditure was incurred.

h) Allocation of support costs

Resources expended are allocated to the particular activity where the cost relates directly to that activity. However, the cost of overall direction and administration of each activity, comprising the salary and overhead costs of the central function, is apportioned on the basis which are an estimate, based on staff time, of the amount attributable to each activity.

Where information about the aims, objectives and projects of the charity is provided to potential beneficiaries, the costs associated with this publicity are allocated to charitable expenditure.

Where such information about the aims, objectives and projects of the charity is also provided to potential donors, activity costs are apportioned between fundraising and charitable activities on the basis of area of literature occupied by each activity.

i) Operating leases

Rental charges are charged on a straight line basis over the term of the lease.

j) Tangible fixed assets

Items of equipment are capitalised where the purchase price exceeds £500. Depreciation costs are allocated to activities on the basis of the use of the related assets in those activities. Assets are reviewed for impairment if circumstances indicate their carrying value may exceed their net realisable value and value in use.

Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rates in use are as follows:

Leasehold improvements	20% pa on cost
Computer equipment	33% pa on cost
Furniture and equipment	20% pa on cost
Website development	20% pa on cost

k) Debtors

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

l) Cash at bank and in hand

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account. Cash balances exclude any funds held on behalf of service users.

m) Creditors and provisions

Creditors and provisions are recognised where the charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

n) Financial instruments

The charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

o) Pensions

The charity operates a stakeholders pension scheme.

2 Income from charitable activities

		2024	2023
	Unrestricted	Total	Total
	£	£	£
Contracts and fees receivable:			
Sage Publications – Royalties	638,595	638,595	819,269
Conference fee attendance	656,498	656,498	586,517
Consultancy	456,108	456,108	353,212
Research & Evaluation	522,535	522,535	571,723
Project funds surplus/(deficit)	(299,694)	(299,694)	578,786
Strategic growth	8,742	8,742	874
Total income from charitable activities	1,982,784	1,982,784	2,910,381

3 Income from investments

		2024	2023
	Unrestricted	Total	Total
	£	£	£
Investment income	12,050	12,050	10,568
	12,050	12,050	10,568

4 Other incomes

		2024	2023
	Unrestricted	Total	Total
	£	£	£
Others	4,117	4,117	373
	4,117	4,117	373

The Tavistock Institute Of Human Relations
Notes to the financial statements
For the year ended 30 September 2024

5 a. Analysis of expenditure

	Charitable activities						
	Research Evaluation and Organisational Development	Strategic Initiatives	Professional development	Royalties from publications	Support costs	2024 Total	2023 Total
	£	£	£	£	£	£	£
Staff costs (Note 7)	1,085,727	495	58,250	7,562	329,467	1,481,501	1,610,689
Direct cost							
Other direct cost	-	-	-	85	-	85	11,641
Conference fees and expenses	6,768	-	9,818	1,434	3,431	21,451	51,166
Consultancy fees	80,956	6,517	81,609	119,863	29,319	318,264	459,716
Travelling and meeting expenses	30,783	897	111,807	1,903	1,842	147,232	182,781
Support cost							
Other staff costs	91	-	-	278	18,130	18,499	42,905
Rent, rate & service charge	-	-	-	-	114,799	114,799	111,054
Books and subscription	784	-	6	-	3,345	4,135	2,189
Marketing	-	-	-	-	5,776	5,776	5,335
Insurance	-	-	-	-	13,441	13,441	12,954
Printing, postage and stationery	2,069	488	2,065	13	3,050	7,685	9,019
Website and computer expenses	33,500	267	192	69	79,236	113,264	72,408
Telephone and internet	4,076	-	287	194	8,038	12,595	18,410
Office expenses	37	-	147	-	19,401	19,585	16,081
Sundry	-	-	-	-	55	55	-
Depreciation & disposal of fixed assets	-	-	-	-	18,978	18,978	19,691
Profit and loss on exchange	-	-	-	-	5,579	5,579	11,849
Legal and professional	575	-	-	589	2,218	3,382	335
Audit fees	-	-	-	-	5,765	5,765	(1,661)
Bank charges	237	-	3,583	750	6,580	11,150	11,259
	1,245,603	8,664	267,764	132,740	668,450	2,323,221	2,647,821
Support costs	628,342	-	33,423	6,685	(668,450)	-	-
Total expenditure 2024	1,873,945	8,664	301,187	139,425	-	2,323,221	2,647,821
Total expenditure 2023	2,109,182	14,610	345,270	178,759	-	2,647,821	

The total expenditure £2,323,221 was unrestricted (2023: £2,647,821).

b. Analysis of expenditure (prior year)

	Charitable activities						
	Research Evaluation and Organisational Development	Strategic Initiatives	Professional development	Royalties from publications	Support costs	2023	
	£	£	£	£	£	£	
Staff costs (Note 7)	1,097,359	3,123	62,835	9,313	438,059	1,610,689	
Direct cost							
Other direct cost	11,350	-	-	90	201	11,641	
Conference fees and expenses	6,686	33	9,683	32,086	2,678	51,166	
Consultancy fees	223,060	4,574	93,231	106,726	32,125	459,716	
Travelling and meeting expenses	23,358	1,944	136,938	17,079	3,462	182,781	
Support cost							
Other staff costs	8,782	-	120	189	33,814	42,905	
Rent, rate & service charge	-	-	-	-	111,054	111,054	
Books and subscription	20	-	(339)	-	2,508	2,189	
Marketing	2,404	-	529	2,402	-	5,335	
Insurance	-	-	-	334	12,620	12,954	
Printing, postage and stationery	2,939	-	2,304	859	2,917	9,019	
Website and computer expenses	29,154	374	96	546	42,238	72,408	
Telephone and internet	6,361	-	368	288	11,393	18,410	
Office expenses	161	-	143	344	15,433	16,081	
Depreciation & disposal of fixed assets	-	-	-	-	19,691	19,691	
Profit and loss on exchange	-	-	-	-	11,849	11,849	
Legal and professional	-	4,562	-	485	(4,712)	335	
Audit fees	-	-	-	-	(1,661)	(1,661)	
Bank charges	201	-	2,269	597	8,192	11,259	
	1,411,835	14,610	308,177	171,338	741,861	2,647,821	
Support costs	697,347	-	37,093	7,421	(741,861)	-	
Total expenditure 2023	2,109,182	14,610	345,270	178,759	-	2,647,821	

6 Net incoming resources for the year

This is stated after charging / crediting:

	2024	2023
	£	£
Depreciation	32,065	26,310
Operating lease rentals:		
Property	93,529	82,310
Auditors' remuneration (excluding VAT):		
Audit	5,400	5,400

7 Analysis of staff costs, trustee remuneration and expenses, and the cost of key management personnel

Staff costs were as follows:

	2024	2023
	£	£
Salaries and wages	1,147,912	1,198,923
Social security costs	123,806	132,990
Employer's contribution to defined contribution pension schemes	209,783	278,776
	<u>1,481,501</u>	<u>1,610,689</u>

The following number of employees received employee benefits (excluding employer pension) during the year between:

	2024	2023
	No.	No.
£120,000 - £130,000	<u>1</u>	<u>1</u>

The total employee benefits including pension and national insurance contributions of the key management personnel were £147,282 (2023: £143,963).

The charity trustees were not paid or received any other benefits from employment with the charity in the year (2023: £nil). No charity trustee received payment for professional or other services supplied to the charity (2023: £nil).

Trustees' indemnity insurance was taken out in the year at a cost to the Charity of £2,320 (2023: £2,320).

8 Staff numbers

The average number of employees (head count based on number of staff employed) during the year was as follows:

	2024	2023
	No.	No.
Raising funds	-	-
Scientific Staff	17.7	20.2
Support	6.3	6.4
	<u>24.0</u>	<u>26.6</u>

9 Related party transactions

There are no related party transactions to disclose for 2024 (2023: none).

There are no donations from related parties which are outside the normal course of business and no restricted donations from related parties.

10 Taxation

The charitable company is exempt from corporation tax as all its income is charitable and is applied for charitable purposes.

11 Intangible fixed assets– Group/Charity

	Website development £	Total £
Cost		
At the start of the year	65,435	65,435
Additions in year	–	–
Disposals in year	–	–
At the end of the year	65,435	65,435
Depreciation		
At the start of the year	6,619	6,619
Charge for the year	13,087	13,087
Eliminated on disposal	–	–
At the end of the year	19,706	19,706
Net book value		
At the end of the year	45,729	45,729
At the start of the year	58,816	58,816

12 Tangible fixed assets– Group/Charity

	Leasehold Improvements £	Computer Equipment £	Fixtures, fittings and Equipment £	Total £
Cost				
At the start of the year	191,562	166,771	34,501	392,834
Additions in year	–	11,147	853	12,000
Disposals in year	–	–	–	–
At the end of the year	191,562	177,918	35,354	404,834
Depreciation				
At the start of the year	189,736	151,344	27,426	368,506
Charge for the year	–	16,054	2,924	18,978
Eliminated on disposal	–	–	–	–
At the end of the year	189,736	167,398	30,350	387,484
Net book value				
At the end of the year	1,826	10,520	5,004	17,350
At the start of the year	1,826	15,427	7,075	24,328

All of the above assets are used for charitable purposes.

13 Investments– Charity

	2024 £	2023 £
Investment in subsidiary undertakings	21,535	21,535
	21,535	21,535

Investments– Charity (CONT.)

Subsidiaries

Details of the charity's subsidiaries at 30 September 2024 are as follows:

Name of undertaking	Registered office	Nature	Shares held
Tavistock Institut gGmbH	Germany	A not for profit company (gGmbH)	100%

The aggregate reserves and the result for the year of the subsidiaries noted above was as follows:

	2024 £	2023 £
Incoming resources:		
Research	44,240	52,633
EU Grant income	181,997	201,558
Other	363	0
	<u>226,600</u>	<u>254,191</u>
Outgoing resources:		
Project partners	(132,888)	(58,951)
Other project costs	(95,391)	(183,775)
Staff costs	(30,802)	(25,821)
Legal and professional	–	(9,695)
Bank charges	(601)	(513)
Accountancy	(710)	(2,140)
Exchange (loss)/gain	(1,668)	1,195
Net income / (expenditure)	<u>(35,460)</u>	<u>(25,509)</u>
Funds brought forward	57,513	83,022
Reserves	<u>22,053</u>	<u>57,513</u>

The subsidiary is exempt from the audit in accordance with German Companies Act and the results of Tavistock Institut gGmbH have been consolidated on a line by line basis and included under charitable activities of both under income and expenditure.

14 Debtors

	The Group		The Charity	
	2024	2023	2024	2023
	£	£	£	£
Amounts recoverable on contracts	298,941	564,692	298,941	564,692
Prepayments	69,091	38,980	69,091	38,980
Accrued income	123,762	44,759	123,762	44,759
	<u>491,794</u>	<u>648,431</u>	<u>491,794</u>	<u>648,431</u>

15 Creditors: amounts falling due within one year

	The Group		The Charity	
	2024	2023	2024	2023
	£	£	£	£
Trade creditors	213,359	250,470	79,072	54,875
Taxation and social security	63,155	52,148	63,155	52,148
Amounts due to group undertaking	–	–	9,637	9,637
Accruals	297,940	403,848	295,852	401,709
Deferred income	658,069	707,953	658,069	707,953
	<u>1,232,523</u>	<u>1,414,419</u>	<u>1,105,785</u>	<u>1,226,322</u>

16 Deferred income

Deferred income comprises the payments on account of contracts and fees received in advance.

	2024 £	2023 £
Balance at the beginning of the year	707,953	1,161,091
Amount released to income in the year	(707,953)	(1,161,091)
Amount deferred in the year	658,069	707,953
Balance at the end of the year	<u>658,069</u>	<u>707,953</u>

17 Pension scheme

The charity operates a stakeholders pension scheme and has no pension liability as at the year end.

The company also operates a defined benefit scheme in the UK. This is a separate trustee-administered fund holding the pension scheme assets to meet long term pension liabilities.

With effect from 30 November 2010, the scheme was closed to future accruals of current employees.

In 2011 the Institute agreed a revised deficit reduction plan with the pension fund trustees whereby the deficit would be repaid over 14 years 9 months.

Pension Commitments– FRS102 Section 28 Disclosure

Retirement Benefits Plan (1974)

A full actuarial valuation was carried out at 31 March 2016 and updated to 30 September 2019 by a firm of qualified actuaries. The charity currently pays contributions at the rates set out in the Schedule of Contributions prepared following the 31 March 2019 scheme funding valuation. The estimated future contributions to the plan for the year ended 30 September 2024 are £361,821 (2023: £348,743) increasing by 3.75% per annum, payable monthly from 1 April 2017 to 31 July 2033.

Assumptions:

The major assumptions used by the actuary in assessing liabilities on a FRS 102 basis were:

Assumptions as at	30 September 2024	30 September 2023
Discount rate	5.1%	5.4%
Inflation (RPI)	3.4%	3.5%
Rate of increase in pension in payment capped at 5%	3.4%	3.5%
Rate of increase in pension in payment capped at 2.5%	2.5%	2.5%

The average future life expectancies at age 65 are summarised below:

	Males	Females
Retiring today	20.9	23.4
Retiring in 20 years	22.6	25.2

The major categories of scheme assets	30 September 2024	30 September 2023
	£'000	£'000
UK Bonds (including LDI)	1,464	1,356
Equities	1,945	1,695
Diversified growth funds (DGFs)	1,946	1,500
Cash	129	16
	<u>5,484</u>	<u>4,567</u>

Net defined benefit pension liability recognised in the balance sheet

	30 September 2024	30 September 2023
	£'000	£'000
Present value of funded obligations	(5,704)	(5,491)
Fair value of scheme assets	<u>5,484</u>	<u>4,567</u>
Net pension liability	<u>(220)</u>	<u>(924)</u>

Changes in the present value of the defined benefit obligation

	30 September 2024	30 September 2023
	£'000	£'000
Opening defined benefit obligation	(5,491)	(6,005)
Current service cost	-	-
Interest cost	(293)	(301)
Employee contributions	-	-
Actuarial (losses) / gains	(59)	615
Benefits paid	<u>139</u>	<u>200</u>
Defined benefit obligation at end of year	<u>(5,704)</u>	<u>(5,491)</u>

Pension Commitments– FRS102 Section 28 Disclosure (CONT.)

Changes in the fair value of the scheme assets

	30 September 2024 £'000	30 September 2023 £'000
Opening fair value of scheme assets	4,567	4,390
Interest income	252	227
Actuarial gains / (losses)	455	(181)
Employer contributions	349	331
Administration expenses	–	–
Benefits paid	(139)	(200)
Fair value of scheme assets at the year end	5,484	4,567

The amounts included within the Statements of Financial Activities

The amounts recognised in P&L /income statement

	30 September 2024 £'000	30 September 2023 £'000
Service cost	–	–
Interest cost	(293)	(301)
Interest income	252	227
Net charges to P&L /income statement	(41)	(74)

Remeasurement gains / (losses) recognised in other comprehensive income

Return on scheme assets (excluding interest)	455	(181)
Actuarial gains / (losses) on defined benefit obligation	(59)	615
Total actuarial gains / (losses)	396	434
Total amount charged to the Statement of Financial Activities	355	360

Amounts for the current and previous 4 years

	Year to 30 September 2024 £'000	Year to 30 September 2023 £'000	Year to 30 September 2022 £'000	Year to 30 September 2021 £'000	Year to 30 September 2020 £'000
Fair value of employer assets	5,484	4,744	4,390	5,676	4,835
Present value defined benefit obligation	(5,704)	(4,977)	(6,005)	(9,745)	(10,598)
Deficit	(220)	(233)	(1,615)	(5,763)	(5,962)
Experience gains / (losses) on liabilities	(59)	615	3,792	918	(111)
Adjustment due to change in assumption:	–	–	–	–	234
Experience gains / (losses) on assets	455	(181)	(1,555)	564	(103)
Actuarial (loss) / gain	396	434	1,482	20	(1,951)

18 Analysis of net assets between funds– Group

	General unrestricted £	Pension fund £	Restricted £	Total funds £
Inangible fixed assets	45,729	–	–	45,729
Tangible fixed assets	17,350	–	–	17,350
Net current assets / (liability)	(18,245)	–	–	(18,245)
Defined benefit pension scheme asset / (liability)	–	(220,000)	–	(220,000)
Net assets at the end of the year	44,834	(220,000)	–	(175,166)

Analysis of net assets between funds– Charity

	unrestricted £	Pension fund £	Restricted £	Total funds £
Inangible fixed assets	45,729	–	–	45,729
Tangible fixed assets	38,885	–	–	38,885
Net current assets / (liability)	(61,837)	–	–	(61,837)
Defined benefit pension scheme asset / (liability)	–	(220,000)	–	(220,000)
Net assets at the end of the year	22,777	(220,000)	–	(197,223)

19 Movements in funds

	At the start of the year £	Incoming resources & gains £	Outgoing resources & losses £	Transfers £	At the end of the year £
Unrestricted funds:					
Charity general funds	655,050	1,998,951	(2,323,221)	(308,000)	22,780
Subsidiary general funds	57,514	226,600	(262,060)	–	22,054
Total unrestricted funds	712,564	2,225,551	(2,585,281)	(308,000)	44,834
Pension fund	(924,000)	396,000	–	308,000	(220,000)
Total funds	(211,436)	2,621,551	(2,585,281)	–	(175,166)

Movements in funds (prior year)

	At the start of the year £	Incoming resources & gains £	Outgoing resources & losses £	Transfers £	At the end of the year £
Unrestricted funds:					
Charity general funds	638,551	2,921,322	(2,647,821)	(257,000)	655,052
Subsidiary general funds	83,021	254,191	(279,700)	–	57,512
Total unrestricted funds	721,572	3,175,513	(2,927,521)	(257,000)	712,564
Pension fund	(1,615,000)	434,000	–	257,000	(924,000)
Total funds	(893,428)	3,609,513	(2,927,521)	–	(211,436)

20 Reconciliation of net income / (expenditure) to net cash flow from operating activities

	2024 £	2023 £
Net income / (expenditure) for the reporting period (as per the statement of financial activities)	(359,730)	247,992
Depreciation charges and disposal	32,065	26,310
Interest, rent and dividends from investments	(12,050)	(10,568)
FRS102 defined benefit pension scheme adjustment	(308,000)	(257,000)
(Increase)/decrease in debtors	156,637	(128,086)
Increase/(decrease) in creditors	(181,896)	(177,403)
Net cash provided by / (used in) operating activities	(672,974)	(298,755)

21 Analysis of cash and cash equivalents

	The Group		
	At 1 October 2023 £	Cash flows £	Other changes £
Cash in hand	1,395,408	(672,924)	-
Total cash and cash equivalents	1,395,408	(672,924)	-

	At 1 October 2022 £	Cash flows £	Other changes £
Cash in hand	1,731,339	(335,931)	-
Total cash and cash equivalents	1,731,339	(335,931)	-

22 Operating lease commitments– Group and Charity

Total future minimum lease payments under non-cancellable operating leases are as follows:

	Property 2024 £	2023 £
Less than one year	80,000	80,000
One to five years	54,575	134,575
	134,575	214,575

At 7th June 2021 the Institute had annual commitments under operating leases in respect of office premises. The rent payable was for the year from 7th June 2021 of £46,666 per annum and thereafter £80,000 per annum until the end of the term. The lease term is 5 years from 7th June 2021 and expiring on 6th June 2026.

23 Legal status of the charity

The charity is a company limited by guarantee and has no share capital. The liability of each member in the event of winding up is limited to £1.