

# THE INSTITUTE FOR JEWISH POLICY RESEARCH

England & Wales · Charity number 252626

## Details

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Other names	THE INSTITUTE OF JEWISH AFFAIRS, THE INSTITUTE OF JEWISH AFFAIRS LIMITED, JPR
Status	Registered
Legal form	Charitable company
Company number	<a href="#">00894309</a>
Registered	1970-03-18
Register	<a href="#">View on the Charity Commission register</a>

## Contact

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Website	<a href="http://www.jpr.org.uk">www.jpr.org.uk</a>

## Activities

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**Objects:** TO PROMOTE, ASSIST IN, ORGANISE, AND CARRY OUT THE STUDY OF, AND RESEARCH INTO, AND THE INCREASE OF KNOWLEDGE CONCERNING THE SOCIAL, RELIGIOUS, CULTURAL, ECONOMIC AND COMMUNAL LIFE AND THE WELFARE AND STATUS OF JEWS AND JEWISH COMMUNITIES THROUGHOUT THE WORLD AND OF INTERNATIONAL AND NATIONAL QUESTIONS, TRENDS, VIEWS AND CONDITIONS IN REGARD TO THEIR EFFECTS ON THE LIFE, WELFARE AND STATUS OF THE JEWISH PEOPLE AND THE RELATIONS BETWEEN JEWS AND NON-JEWS.

**Activities:** The Institute for Jewish Policy Research engages in research projects, the publication of papers, reports and on-line newsletters, and the organisation of conferences, lectures and seminars.

## Classification

- **How:** Provides Advocacy/advice/information, Sponsors Or Undertakes Research
- **What:** General Charitable Purposes, Arts/culture/heritage/science, Environment/conservation/heritage, Economic/community Development/employment
- **Who:** People Of A Particular Ethnic Or Racial Origin, Other Charities Or Voluntary Bodies, Other Defined Groups, The General Public/mankind

## Geography

- Throughout London

## Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£1,140,303	£1,042,035	£3,144,702	9
2023-12-31	£956,309	£1,009,625	£3,034,080	8
2022-12-31	£953,274	£1,057,193	£3,002,009	10
2021-12-31	£879,952	£845,091	£3,343,692	9
2020-12-31	£894,418	£839,395	£3,106,219	9

## Trustees

Name	Role	Appointed
Adam Taub		2025-05-01
DENISE NICOLE JOSEPH		2023-07-10
David Malcolm Ereira		2023-04-24
Dr Efrat Shaoulian-Sopher		2024-01-25
FELICIA EPSTEIN		2023-04-24
Mark Berman		2023-07-10
Professor Jonathan Edward Haskel CBE		2019-10-28

## Linked charities

- THE MCA ENDOWMENT FUND (252626-1)

**THE INSTITUTE FOR JEWISH POLICY RESEARCH**

England & Wales - Charity number 252626

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# Accounts

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Company registration number: 00894309

Charity registration number: 252626

# The Institute For Jewish Policy Research

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 December 2024



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**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Trustees  
For the Year Ended 31 December 2024**

**LEGAL AND ADMINISTRATIVE INFORMATION**

<b>Charity number</b>	252626
<b>Company number</b>	00894309
<b>Governing Document</b>	Articles of Association
<b>Joint President</b>	Lord Leigh of Hurley Lord Kestenbaum of Foxcote (appointed 03/12/2024)
<b>Honorary President</b>	Lord Rothschild OM (deceased 26/02/2024)
<b>Honorary Vice Presidents</b>	Lord Haskel Harold Paisner Sir Trevor Chinn CVO Stephen Moss CBE (from 2025)
<b>Chairman</b>	Stephen Moss CBE (until 31 December 2024) David Ereira (from 1 January 2025)
<b>Vice-Chairman</b>	David Ereira (until 1 January 2025)
<b>Treasurer</b>	Michael Karp OBE (retired 25/01/2024) Denise Joseph (appointed 25/01/2024)
<b>Executive Director</b>	Dr. Jonathan Boyd
<b>Director of Operations and Company Secretary</b>	Richard Goldstein
<b>Senior Research Fellows</b>	Dr. David Graham Dr. Daniel Staetsky Dr. Carli Lessof Dr Keith Kahn-Harris
<b>Directors and Board of Management</b>	
David Ereira	
Stephen Moss CBE	(retired 31/01/2025)
Lord Leigh of Hurley	(retired 30/06/2025)
Denise Joseph	
Michael Karp OBE	(retired 25/01/2024)
William Benjamin	(retired 31/01/2025)
Elizabeth Crossick	(retired 28/06/2024)
Miles Webber	(retired 28/06/2024)
Professor Jonathan Haskel CBE	
Dr Efrat Sopher	(appointed on 26/01/2024)
Mark Berman	
Felicia Epstein	
Adam Taub	(appointed on 01/05/2025)
<b>Registered office</b>	6 Greenland Place London NW1 0AP England
<b>Auditor</b>	A C Mole LLP Chartered Accountants and Statutory Auditors Stafford House Blackbrook Park Avenue Taunton, Somerset, TA1 2PX

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**Bankers**

Barclays Bank plc  
1 Churchill Place London  
E14 5HP

**Investment Managers**

LGT Wealth Management UK LLP  
14 Cornhill  
London  
EC3V 3NR (Until August 2024)

Rathbones incorporating Investec  
30 Gresham Street  
London  
EC2V 7QN (From August 2024)

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**Chairman's statement**

The Institute for Jewish Policy Research (JPR) has had an exceptional and highly productive year in 2024, marked by unprecedented demand for our expertise, record levels of research output, and deep engagement with Jewish communities in the UK, across Europe and beyond.

In the wake of the profound global and communal effects of the events in Israel on 7 October 2023, JPR responded with agility and rigour. We produced timely, evidence-based insights on antisemitism, Jewish identity, political engagement, education and community life, ensuring that leaders, policymakers, and the public had access to the most reliable data at a time of uncertainty and heightened concern.

Early in the year, our landmark National Jewish Identity Survey report provided the most comprehensive picture of Jewish life in the UK to date, and later in the summer we utilised our UK Jewish Population Research panel to run our Jewish Current Affairs Survey, which informed multiple reports on topics including antisemitism in schools, attitudes to Israeli leadership, post-October 7 antisemitism monitoring, and changes in communal engagement and participation among British Jews. We also produced thematic factsheets aligned with the Jewish calendar, and conducted the first-ever national survey of the UK haredi community. The second series of our popular podcast, Jews Do Count, produced in partnership with JW3, ensured these insights reached a wide audience.

Our European work went from strength to strength. We continued our work on a major European Commission-funded survey on attitudes towards Jews and Israel across all EU Member States, completed a full demographic study of Dutch Jewry, expanded our European Jewish Research Archive to hold over 5,000 items, and we began preparatory work on a tender for a new €3 million European Jewish Research Hub in 2025.

Beyond publications, JPR delivered presentations, briefings and media appearances at the highest levels, from the Organization for Security and Co-operation in Europe (OSCE) 50th anniversary conference in Helsinki, to the French National Assembly and multiple European Jewish leadership gatherings. Our research and analysis were quoted in over 100 media outlets worldwide, and our online reach grew to over 224,000 unique website users, 350,000 page views and thousands of downloads of our research.

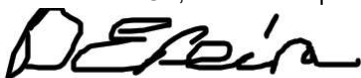
None of this would have been possible without the steadfast support of our donors. I extend our deep gratitude to the Rothschild Foundation Hanadiv Europe, Pears Foundation, and the Maurice Wohl Charitable Foundation for their long-term, continued strategic investment in our research capacity. We are grateful also to the David and Ruth Lewis Family Charitable Trust, the Bloom Foundation, the Haskel Family Foundation, the Charles Wolfson Charitable Trust, the Kirsh Foundation, the Morris and Manja Leigh Foundation, and the many individuals whose generosity supports JPR's work.

I also want to pay tribute to my fellow trustees for their commitment and wise counsel, and to acknowledge those who stepped down in 2024, most notably Stephen Moss CBE, who concluded his distinguished tenure as Chairman at the year-end, and whose outstanding leadership over many years has been instrumental in shaping JPR's success.

Most of all, my thanks go to JPR's outstanding professional team, led by our exceptional Executive Director, Dr Jonathan Boyd. Our research and operations teams have worked tirelessly to deliver the highest quality outputs in challenging times, and their dedication to JPR's work is unwavering.

Looking ahead to 2025, JPR will strive to continue to deliver impactful research, including our Jews in Uncertain Times survey, a major analysis of the 2021 UK Census Jewish data, and our longitudinal study of British Jews' relationship with Israel. We will also pursue new strategic initiatives, including work with the European Jewish Research Hub, expanded consultancy services, and potential new policy and intelligence functions for the UK Jewish community.

Despite the many challenges facing Jewish communities today, I remain optimistic about JPR's future. We have the expertise, the vision and the partnerships to ensure our research continues to support the Jewish community's needs in the UK, across Europe and beyond for many years to come.



David Ereira  
**Chairman**

Date: 22/09/2025

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Trustees  
For the Year Ended 31 December 2024**

The trustees present their Annual Report together with the Audited Financial Statements for the year ended 31 December 2024. The Institute for Jewish Policy Research is a charitable company limited by guarantee under registration number 00894309 and is registered by the Charity Commission under registration number 252626. Please refer to page 1 for further legal and professional information.

The financial statements have been prepared in accordance with the accounting policies set out in note 2 to the financial statements and comply with the charity's articles of association, the Companies Act 2006 and "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 2019).

## **OBJECTIVES AND ACTIVITIES**

The Institute for Jewish Policy Research (JPR) exists to enhance the prospects of Jewish communities in the UK and across Europe by conducting independent, high-quality research and supporting effective policy development. Our core aim is to provide community leaders, charities, governments and philanthropists with the robust data and insights they need to make informed decisions.

JPR's work spans critical domains including demography, antisemitism, identity, education, health, welfare, community engagement, charitable giving and Israel–Diaspora relations. The Institute is non-partisan and non-ideological in its outlook. Its purpose is to ensure Jewish life across Europe is understood and supported through data-led insights, not intuition.

In 2024, JPR focused on:

- Generating independent, academically credible social and demographic research.
- Maintaining, developing and utilising our representative panel of Jewish populations for efficient, cost-effective data collection.
- Supporting Jewish charities and communal institutions with strategic data for long-term planning.
- Deepening our research infrastructure to respond rapidly to societal change.
- Strengthening communications through newsletters, media partnerships, podcasts, digital publishing and archive development.
- Broadening accessibility through publicly available, digestible reports and data-driven tools.

All our activities are for the public benefit and align fully with Charity Commission guidance.

## **JPR'S WORK IN 2024**

JPR had a particularly productive year in 2024, reflecting our ability to address rapidly evolving communal needs. Against the backdrop of global and communal volatility following the events in Israel on 7 October 2023, JPR responded with agility and rigour, delivering a record volume of research outputs and responding to an extraordinary level of demand for insight, advice and partnership.

JPR carried out high-profile research on Jewish political engagement, communal identity, antisemitism and education. We supported governments, synagogues, schools, and charities with evidence-based insights. And we scaled up our communications and digital presence to ensure our findings were accessible and widely used.

Each publication was grounded in robust data collection and analysis and disseminated to audiences ranging from local synagogues to European policymakers.

## **Key Publications**

- [National Jewish Identity Survey key findings](#) (February 2024): this landmark study provided a detailed and updated profile of how British Jews understand and live their Jewish lives. It was based on JPR's National Jewish Identity Survey, conducted in November–December 2022 among nearly 5,000 members of the JPR research panel. It was the largest survey of its kind and the most comprehensive study of Jewish identity in the UK to date.
- In June, JPR launched its 2024 Jewish Current Affairs Survey, which focused on how Jews in the UK felt about the October 7 attacks on Israel, the war in Gaza, antisemitism in the UK, and the upcoming UK General Election. Topics also included religious observance, education, culture, charitable giving, Zionism, intermarriage, Israel, and wellbeing. Drawing on the data for this survey, JPR produced a series of reports –

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- [Antisemitism in schools](#) (September 2024)
- [British Jewish attitudes to Israeli leadership](#) (September 2024)
- [Antisemitism in the aftermath of October 7](#) including gaps in the UK's post-Brexit antisemitism monitoring (October 2024)
- [Public fears and changes in behaviour among British Jews](#) (October 2024)
- Thematic mini-reports and factsheets aligned with key moments in the Jewish calendar to maximise engagement:
  - [Passover observance by British Jews](#) (April 2024)
  - [Observance of Israel commemoration days](#) (Yom Ha'atzmaut and Yom Hazikaron) by UK Jews (May 2024)
  - [Shavuot in seven charts](#): Factsheet on Jewish belief, prayer and study (June 2024)
  - [Shabbat observance and practices among British Jews](#) (August 2024)
  - [High Holy Days observance](#) among Jewish in the UK (September 2024)
- [Jewish voting intentions](#) (June 2024): Based on JPR's Jewish Current Affairs Survey. This report provided unique insights into political sentiment ahead of the July 2024 general election as a means of understanding more about contemporary Jewish identity.
- [Dutch Jewish Demography Report](#) (January 2025): Examined the shifting demographics of Dutch Jewry, especially the impact of Israeli migrants. This landmark report marked the first time in over a decade that Jewish demographic and sociological data from the Netherlands was published in such depth. This project was undertaken in collaboration with the Jewish Social Work Foundation/Joods Maatschappelijk Werk (JMW).

Many of these reports were presented at public and private gatherings, briefings and events and further disseminated via community-facing factsheets. Working in partnership with JW3 and Earshot Strategies, we also ran a second series of our podcast, '[Jews Do Count](#),' focused on the data generated by our Jewish Current Affairs Survey. Each episode looked at a different theme (views of British Jews on how Israel has prosecuted the war; their sense of security and belonging in Britain; and their attachments to Israel and the Jewish community), and included a special guest in each episode. The episodes trending as the leading British Jewish podcast for several weeks.

#### **Major research programmes:**

**2024 Jewish Current Affairs Survey:** In June 2024, JPR conducted a survey examining perspectives among Jews in the UK regarding the 7 October 2023 events in Israel, the conflict in Gaza, levels of antisemitism in the UK, and the forthcoming UK General Election. The survey also gathered data on aspects such as religious practice, education, cultural engagement, charitable activities, views on Zionism, intermarriage, attitudes toward Israel, and overall wellbeing.

**UK Haredi Survey:** this first ever quantitative nationwide study of haredi (strictly Orthodox) Jews provided Strictly Orthodox Jews living in the UK with the opportunity to share their needs and opinions in order to enable policymakers to gain the insights necessary to plan for the community's future and help foster haredi Jewish life in the UK. It included questions on a wide range of topics, from family life, housing, education, health and socioeconomics to experiences and perceptions of antisemitism. Close to 2,500 haredi Jews participated in the survey making it the largest study ever to be undertaken on the haredi community in the UK.

**European study of attitudes towards Jews and Israel:** The European Commission awarded JPR and Ipsos this significant contract in September 2023 to conduct the first EU-wide study on this topic, covering all 27 Member States. The €1 million project seeks to explore the attitudes of the populations of each Member State towards Jews and Israel. Fieldwork for the study was delayed following the October 7 attacks, with the project temporarily halted in summer 2024 and expected to resume in 2025.

#### **Commissioned research**

JPR undertook a broad portfolio of commissioned research projects during the reporting period, addressing issues across education, welfare, identity, antisemitism, community demographics and institutional planning. These commissions reflect the wide-ranging expertise of JPR's team, and the trust placed in our ability to deliver timely, sensitive, and empirically grounded insights tailored to client needs.

JPR was commissioned by a wide variety of clients in the UK and abroad, including the Jewish Leadership Council (JLC), Jewish Aids Trust, Jami, Maccabi UK and Haringey Council, and Joods Maatschappelijk Werk (JMW) and

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Rosj Pina School in the Netherlands, showing its practical relevance to both national, international and grassroots institutions.

**European Jewish Research Archive**

Our European Jewish Research Archive is a unique open-access repository of research undertaken about contemporary Jewish life in Europe since 1990, aimed both at the research and policy communities. At the end of 2024, the archive housed 5,290 items of research across 62 countries and 32 languages. A new archive newsletter was launched and new content curation strategies developed in anticipation of JPR's bid for the €3–3.5 million European Jewish Research Hub in 2025.

**PUBLIC BENEFIT**

JPR provides a public benefit by producing research that strengthens Jewish communal infrastructure, informs public policy, and improves understanding of minority communities. Our work is published freely online and is widely accessed by Jewish charities, government bodies, academics, journalists and the wider public. The Charity also presents its findings regularly to charities, synagogues, schools, government officials, civil servants and journalists, and its analysis supports policymaking in education, welfare, security, health and community planning.

JPR Trustees confirm that all of JPR's activities provide public benefit and comply fully with the guidance issued by the Charity Commission under the Charities Act 2011.

JPR's aims and activities give clearly identifiable benefits to the public and continue to be charitable. The work particularly benefits the Jewish voluntary sector in the United Kingdom and elsewhere in Europe. Through its pioneering social research, JPR also makes contributions to the wider voluntary sector by sharing its knowledge and scholarship, thereby benefiting wider society. The benefits are not unreasonably restricted in any way.

**PERFORMANCE AND IMPACT**

During 2024, JPR continued to deliver talks, conference papers, media interviews, and stakeholder briefings across Europe and the UK. These engagements reflect the breadth of JPR's work and the variety of its audiences – from government policymakers and academics to Jewish communal leaders and the general public.

JPR presented findings to:

- Jewish community leaders, trustees and staff teams across the religious and political spectrum
- UK government departments and parliamentarians
- Local authorities (e.g. Barnet, Haringey)
- International Jewish organisations and think tanks (e.g. JDC Europe)
- International organisations (e.g. the European Commission, European Union and Organization for Security and Co-operation in Europe (OSCE))
- International donors and federations in Amsterdam, Brussels, Berlin, and Jerusalem
- Academic and research conferences
- Media outlets across the UK, Europe and Israel

These wide-ranging engagements underscore JPR's role as a data-rich, policy-relevant and intellectually engaged institution that bridges academic rigour with real-world impact. They also reflect JPR's growing prominence as a thought leader and trusted research institution. From parliaments and media platforms to grassroots events and academic conferences, JPR has ensured its insights are not only published but meaningfully shared and applied across multiple spheres of influence.

**Communication and media**

Communicating our work clearly and persuasively is central to JPR's impact on policy work in Jewish communities. During the reporting period, we significantly expanded our media presence, ensuring that our research reached national and international policymakers, Jewish community lay leaders, educators and funders, and grassroots community members. JPR research is regularly quoted by reporters and researchers in the UK, across Europe and worldwide.

JPR was quoted in over 100 media articles in national, international, Jewish and specialist press. Our work appeared in The Times, The Guardian, The Observer, BBC News, Sky News, The New-York Times, Financial Times, Haaretz, The Jerusalem Post, The Times of Israel, The Jewish Chronicle, The Jewish News and other key publications.

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JPR's Executive Director and staff authored over thirty op-eds and commentary pieces during the reporting period. Topics included opinions on October 7 and the war in Gaza, antisemitism and its effects on Jewish identity and peoplehood, Israel-diaspora relations, the importance of research and data to policy work in the community, Jewish demography, immigration and Jewish education.

Throughout 2024, JPR published 19 thematic newsletters reaching an average of over 4,500 subscribers per edition. These newsletters focused on distributing new reports, surveys and factsheets; promoting participation in key research activities; and advancing our fundraising goals. With average open rates above 44% and click-through rates often exceeding sector benchmarks, engagement was notably strong.

The Charity's website remains a key distribution hub for JPR publications and factsheets. Over 224,000 users visited our website during the year, with a total of 350,000 pages viewed. Nearly 7,600 files, mainly reports, were downloaded by 3,500 unique users.

In 2024, we focused our social media efforts on maintaining an active presence on Facebook, Instagram, X (formerly Twitter), and LinkedIn, sharing new reports, insights, media appearances and updates on our efforts to disseminate our work to high-level policymakers and leaders, as well as supporting our ad-hoc paid Research Panel campaigns.

Collectively, these performance achievements confirm JPR's status as the leading voice for Jewish related data in the UK and a trusted source of insight at the European level.

## **FINANCIAL REVIEW**

The results for the year are shown in the Statement of Financial Activities on page 14.

Total income in 2024 was £1,140,303, with expenditure at £1,042,035, resulting in an operating surplus of £98,268 for the year (total income and expenditure for 2023 were £956,309 and £1,009,625, respectively).

### **Income Breakdown**

- Core philanthropic support: In 2024, JPR secured a total of £225,153 in unrestricted donations (2023: £201,242). In addition, income for research projects and reports totalled £709,695 (2023: £649,066). We are very grateful to our core supporters at the Rothschild Foundation Hanadiv Europe, Pears Foundation, the Maurice Wohl Charitable Foundation among many others.
- Commissioned research: Over £180,000 secured – enabled by prior core funding investment.
- Investment income (which is primarily generated by endowment funds) in 2024 was £205,455 (2023: £106,001) and continued to fund an important proportion of JPR's fixed costs despite market volatility. The value of JPR's investments at the end of 2024 was £2,782,174, of which £2,663,024 (2023: £2,664,600), are endowment assets. This marks an increase from the start of the year of 1.75% (2023: £2,734,246).
- Of the £1,140,303 total income for the year £40,000 relates to pledged donations receivable in 2025 and 2026 and are recorded within debtors on the balance sheet.

## **RESERVES POLICY**

JPR's reserves policy is to seek to retain three to six months of operating expenditure. This amounts to between £260,509 (2023: £252,406) and £521,018 (2023: £504,812). As of 31 December 2024, there were unrestricted funds of £354,503 (2023: £357,762), which is in line with the target range as set out above. Of these funds £2,490 (2023: £3,320) were held as intangible fixed assets, £66,474 (2023: £80,112) as tangible fixed assets and £105,220 (2023: £69,646) as fixed asset investments leaving free reserves of £180,319 (2023: £204,684).

JPR has adopted this policy to cover the risk of any unforeseen emergencies, such as unexpected IT costs or day-to-day operational costs, including employing temporary staff to cover sickness absence during major projects. The policy is designed to deal with fluctuations in income, such as late payments for commissioned work or large grants being delayed or not renewed. The reserves will ensure expenditure is covered on preparatory work on projects, as well as any necessary organisational development costs not covered by income.

The policy of holding three to six months' reserves enables JPR to develop new sources of finance or cut back on expenditure should an emergency arise. In the meantime, the policy provides a stable base for JPR's research and the dissemination of the results to assist Jewish communities in the UK and continental Europe.

### **PERMANENT ENDOWMENT INVESTED ON TOTAL RETURN BASIS**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the preparation and production of research into the state of contemporary Jewish communities in the UK and across Europe, together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of the said purposes. Further details on the fund are disclosed in note 20 to the financial statements.

After many years with LGT Wealth Management as our investment fund managers, it was decided to make a change. In late April, our Investment Committee was delegated the responsibility to meet with potential new fund managers and make a recommendation to the Board. After a thorough process, the Committee was unanimous in recommending Investec/Rathbones be appointed as JPR's new investment managers. They formally took up this appointment in August. The funds are not invested in any companies involved in the manufacture and distribution of tobacco and arms or any companies that boycott Israel.

### **RISK ASSESSMENT**

Risk management is reviewed regularly by staff and a Risk Register is submitted to the Board for approval on an annual basis. The Directors have identified the main risks to which the charitable company is exposed and have taken steps to mitigate them.

### **LOOKING AHEAD TO 2025**

As we look forward to the year ahead, we do so with both pride in our achievements and a clear understanding of the opportunities and challenges that lie ahead. In early 2025, JPR has already presented its work across a wide range of influential platforms – nationally and internationally – including the OSCE's 50th anniversary conference in Helsinki, the French National Assembly, and forums hosted by the JDC, Yesod, UJIA, the Jewish Leadership Council, and the Jewish Labour Movement. We have delivered commissioned research projects for the JLC, Rosj Pina School in Amsterdam and the Jewish Aids Trust, reflecting the high demand for our expertise across Europe.

Our research agenda for the coming year is extensive and ambitious. We will undertake a new national survey of the UK Jewish population, drawing on JPR's research panel to investigate Jewish responses to contemporary issues such as antisemitism and the war in Israel/Gaza. We will continue to partner with Ipsos on a major European Commission-funded project exploring attitudes toward Jews and Israel across all 27 EU member states and key demographic groups.

We will also publish or work on several significant reports in 2025. These include:

- The key findings from our summer 2025 'Jews In Uncertain Times' survey, drawing on new research panel data to understand British Jewish attitudes in light of the unfolding war in the Middle East and heightened levels of antisemitism in the UK.
- A comprehensive analysis of the 2021 UK Census data detailing Jewish demographic trends – our most detailed demographic study in two decades.
- The results of our first-ever national survey of the UK Haredi population, offering vital insights into housing, education, health, antisemitism and community planning.
- A retrospective analysis of British Jews' relationship with Israel over the past thirty years, drawing on a unique longitudinal dataset made possible through our research panel.

We will also be working in partnership with the European University Institute in Florence to submit a tender for the development of a new European Jewish Research Hub – an ambitious €3 million initiative by the European Commission. As ever, we will continue to maintain and curate our European Jewish Research Archive and work to ensure that it continues to serve as an essential resource for policymakers and researchers.

Operationally, as always, we face some pressing financial realities. We aim to reinforce and strengthen our already robust relationships with our long-term funders such as the Rothschild Foundation Hanadiv Europe, Pears Foundation and the Wohl Foundation whilst seeking new foundations and trusts to invest in our work.

To support our organisational goals, and with limited resources to enhance our communications strategy, we will look to streamline our efforts in this area whilst acknowledging the shifting landscape and the emergence of AI. The Charity will also be actively recruiting new trustees to bring additional strategic fundraising and communications skills to our Board. We will also be exploring longer-term development initiatives that could expand our contribution to the UK Jewish community. These include establishing a Jewish policy unit, an intelligence-gathering function focused on key policy challenges, and a more active consultancy service to support community organisations with independent, high-quality advice.

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For the Year Ended 31 December 2024**

Despite global volatility and uncertainties, JPR remains a vital and uniquely positioned institution. Our work in 2025 promises to be far-reaching, and we are committed to ensuring that our research continues to inform, support and strengthen Jewish life in the UK and across Europe for years to come.

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

JPR is governed by a Board of Trustees under Articles of Association. The trustees met quarterly in 2024, supported by subcommittees focused on finance, investment fundraising, nominations and communications.

Organisational developments

- Chair transition: From Stephen Moss CBE to David Ereira
- Treasurer appointed: Denise Joseph
- Investment Committee: Reorganised with stronger oversight protocols.
- Operational leadership: Jonathan Boyd (Executive Director) and Richard Goldstein (Director of Operations) continue to lead the staff team.

**AUDITORS**

A resolution proposing the reappointment of A C Mole LLP as auditors will be put to the members at the Annual General Meeting.

**SMALL COMPANIES PROVISION STATEMENT**

This report has been prepared in accordance with the small companies regime under the Companies Act 2006.

**POST BALANCE SHEET EVENTS**

Details of post balance sheet events are included in the Notes to the Financial Statements.

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For the Year Ended 31 December 2024**

**STATEMENT OF TRUSTEES' RESPONSIBILITIES**

The trustees (who are also directors of The Institute For Jewish Policy Research for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the directors' 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 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.



**David Ereira**  
Chairman and trustee

Date: 22/09/2025



**Denise Nicole Joseph**  
Trustee

Date: 22/09/2025

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report  
For the Year Ended 31 December 2024**

**Independent auditor's report to the Trustees of The Institute for Jewish Policy Research**

**Opinion**

We have audited the financial statements of The Institute for Jewish Policy Research ('the charitable company') for the year ended 31 December 2024 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards comprising Charities SORP – FRS 102 'The Financial Reporting Standard 102: The Financial Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 December 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 Charities Act 2011.

**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 charitable company 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 charitable company's ability to continue as a going concern for a period of at least 12 months from when the financial statements are authorised for issue.

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

**Other information**

The other information comprises the information included in the annual report, including the trustees' report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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.

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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report (Continued)  
For the Year Ended 31 December 2024**

**Matters on which we are required to report by exception**

In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report included within the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion:

- adequate and proper 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 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 the trustees 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 charitable company'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 charitable company or to cease operations, or have no realistic alternative but to do so.

**Auditor's responsibilities for the audit of the financial statements**

The trustees' have elected for the financial statements to be audited in accordance with the Charities Act 2011. Accordingly, we have been appointed under Section 144 of the Charities Act 2011, and report in accordance with that Act.

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 is detailed below:

**Identifying and assessing potential risks of material misstatement due to irregularities**

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the charitable company operates
- the nature of the sector in which the charitable company operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities
- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the charitable company charity include those relating to the requirements of the financial reporting framework FRS102, the Companies Act 2006, the Charities Act 2011,

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report (Continued)  
For the Year Ended 31 December 2024**

UK tax legislation, the Charity Commission, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the charitable company.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

**Audit responses to risks identified**

We undertook audit procedures to respond to the risks identified and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the charitable company's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities is available 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 section 144 of the Charities Act 2011. Our audit work has been undertaken so that we might state to the charitable company'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 charitable company and the charitable company's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

A C Mole LLP is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006.

*AC Mole LLP*

.....  
A C Mole LLP (Senior Statutory Auditor)  
Chartered Accountants and Statutory Auditor  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

Date: *22nd September 2025*

**The Institute For Jewish Policy Research**  
**Statement of Financial Activities for the Year Ended 31 December 2024**  
**(Including Income and Expenditure Account)**

	Note	Unrestricted funds £	Restricted funds £	Endowment funds £	Total 2024 £
<b>Income</b>					
Donations and legacies	3	225,153	-	-	225,153
Charitable activities	4	420,294	289,401	-	709,695
Investment income	5	205,455	-	-	205,455
Total income		<u>850,902</u>	<u>289,401</u>	-	<u>1,140,303</u>
<b>Expenditure</b>					
Raising funds	6	(60,536)	-	-	(60,536)
Charitable activities	7	(793,625)	(187,874)	-	(981,499)
Total expenditure		(854,161)	(187,874)	-	(1,042,035)
Gains on investment assets		-	-	12,354	12,354
Net (expenditure)/income		<u>(3,259)</u>	<u>101,527</u>	<u>12,354</u>	<u>110,622</u>
Net movement in funds		(3,259)	101,527	12,354	110,622
<b>Reconciliation of funds</b>					
Total funds brought forward		<u>357,762</u>	<u>11,718</u>	<u>2,664,600</u>	<u>3,034,080</u>
Total funds carried forward	20	<u>354,503</u>	<u>113,245</u>	<u>2,676,954</u>	<u>3,144,702</u>
	Note	Unrestricted funds £	Restricted funds £	Endowment funds £	Total 2023 £
<b>Income</b>					
Donations and legacies	3	201,242	-	-	201,242
Charitable activities	4	419,872	229,194	-	649,066
Investment income	5	106,001	-	-	106,001
Total income		<u>727,115</u>	<u>229,194</u>	-	<u>956,309</u>
<b>Expenditure</b>					
Raising funds	6	(34,451)	-	(22,522)	(56,973)
Charitable activities	7	(608,455)	(344,197)	-	(952,652)
Total expenditure		(642,906)	(344,197)	(22,522)	(1,009,625)
Gains on investment assets		-	-	85,387	85,387
Net income/(expenditure)		84,209	(115,003)	62,865	32,071
Transfers between funds		(94,949)	94,949	-	-
Net movement in funds		(10,740)	(20,054)	62,865	32,071
<b>Reconciliation of funds</b>					
Total funds brought forward		<u>368,502</u>	<u>31,772</u>	<u>2,601,735</u>	<u>3,002,009</u>
Total funds carried forward	20	<u>357,762</u>	<u>11,718</u>	<u>2,664,600</u>	<u>3,034,080</u>

**The Institute For Jewish Policy Research**  
**(Registration number: 00894309)**  
**Balance Sheet as at 31 December 2024**

	Note	2024 £	2023 £
<b>Fixed assets</b>			
Intangible assets	14	2,490	3,320
Tangible assets	15	66,474	80,112
Investments	16	<u>2,782,174</u>	<u>2,734,246</u>
		<u>2,851,138</u>	<u>2,817,678</u>
<b>Current assets</b>			
Debtors	17	182,699	47,525
Cash at bank and in hand	18	<u>181,680</u>	<u>225,882</u>
		364,379	273,407
<b>Creditors: Amounts falling due within one year</b>	19	<u>(70,815)</u>	<u>(57,005)</u>
<b>Net current assets</b>		<u>293,564</u>	<u>216,402</u>
<b>Net assets</b>		<u>3,144,702</u>	<u>3,034,080</u>
<b>Funds of the charity:</b>			
Unrestricted funds		354,503	357,762
Restricted funds		113,245	11,718
Endowment funds		<u>2,676,954</u>	<u>2,664,600</u>
<b>Total funds</b>	20	<u>3,144,702</u>	<u>3,034,080</u>

The charitable company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2024.

The members have not required the charitable company to obtain an audit of its financial statements for the year ended 31 December 2024 in accordance with Section 476 of the Companies Act.

The members have elected for the financial statements to be audited in accordance with the Charities Act 2011.

The financial statements on pages 14 to 34 were approved by the trustees, and authorised for issue on 22/09/2025..... and signed on their behalf by:



.....  
David Malcolm Ereira  
Chairman and trustee



.....  
Denise Nicole Joseph  
Trustee

**The Institute For Jewish Policy Research**  
**Statement of Cash Flows for the Year Ended 31 December 2024**

	Note	2024 £	2023 £
<b>Cash flows from operating activities</b>			
Net income		110,622	32,071
<b>Adjustments to cash flows from non-cash items</b>			
Depreciation	15	13,638	13,204
Amortisation	14	830	830
Investment income	5	(205,455)	(106,001)
Loss on disposal of investments		11,013	10,257
Revaluation of investments		(23,367)	(95,644)
		(92,719)	(145,283)
<b>Working capital adjustments</b>			
(Increase)/decrease in debtors	17	(135,174)	30,728
Increase/(decrease) in creditors	19	13,810	(11,854)
Net cash flows from operating activities		<u>(214,083)</u>	<u>(126,409)</u>
<b>Cash flows from investing activities</b>			
Interest receivable and similar income	5	205,455	106,001
Purchase of tangible fixed assets	15	-	(4,694)
Purchase of investments	16	(3,054,546)	(784,978)
Sale of investments		3,049,385	739,790
Net cash flows from investing activities		<u>200,294</u>	<u>56,119</u>
Net decrease in cash and cash equivalents		(13,789)	(70,290)
Cash and cash equivalents at 1 January		<u>230,856</u>	<u>301,146</u>
Cash and cash equivalents at 31 December		<u><u>217,067</u></u>	<u><u>230,856</u></u>

# **The Institute For Jewish Policy Research**

## **Notes to the Financial Statements for the Year Ended 31 December 2024**

### **1 Charity status**

The charity is limited by guarantee, incorporated in England & Wales, and consequently does not have share capital. Each of the trustees is liable to contribute an amount not exceeding £1 towards the assets of the charity in the event of liquidation.

The address of its registered office is:

6 Greenland Place  
London  
NW1 0AP

### **2 Accounting policies**

#### **Summary of significant accounting policies and key accounting estimates**

The principal accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all the years presented, unless otherwise stated.

#### **Basis of preparation and statement of compliance**

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. 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)) (issued in October 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

The Institute For Jewish Policy Research meets the definition of a public benefit entity under FRS 102.

The presentation currency of the financial statements is the Pound Sterling (£).

#### **Going concern**

The trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern nor any significant areas of uncertainty that affect the carrying value of assets held by the charity.

#### **Income**

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of the income receivable can be measured reliably.

#### **Donations and legacies**

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance by the charity before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity and it is probable that these conditions will be fulfilled in the reporting period.

If there is a Service Level Agreement or Contract in place income from administration charges is taken into account in the period to which it relates.

For legacies, entitlement is the earlier of the charity being notified of an impending distribution or the legacy being received. At this point income is recognised. On occasion legacies will be notified to the charity however it is not possible to measure the amount expected to be distributed. On these occasions, the legacy is treated as a contingent asset and disclosed.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

## **2 Accounting policies (continued)**

### **Donated services and facilities**

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

### **Investment income**

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. Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

### **Expenditure**

All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources.

### **Raising funds**

These are costs incurred in attracting voluntary income, the management of investments and those incurred in trading activities that raise funds.

### **Charitable activities**

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

### **Support costs**

Support costs are those that assist the work of the Charity but do not directly represent charitable activities and include office costs, governance costs and administrative payroll costs. They are incurred directly in support of expenditure on the objects of the charity. Where support costs cannot be directly attributed to particular headings they have been allocated to costs of raising funds and expenditure on charitable activities on a basis consistent with use of the resources. Support costs detailed in the notes are allocated on the basis apportionment of the time spent on these activities.

### **Governance costs**

Governance costs are included within support costs and comprise all costs associated with meeting the constitutional and statutory requirements of the charity and include professional fees and costs linked to the strategic management of the charity.

### **Irrecoverable VAT**

Irrecoverable VAT is charged against the category expenditure for which it was incurred.

### **Taxation**

The charity is a registered charity and is, therefore, exempt from liability to taxation on its income and capital gains, to the extent that such income or gains are applied exclusively to charitable purposes.

### **Intangible assets**

Intangible assets are stated in the Balance Sheet at cost less accumulated amortisation and impairment. They are amortised on a straight line basis over their estimated useful lives.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**2 Accounting policies (continued)**

**Amortisation**

Amortisation is provided on intangible fixed assets so as to write off the cost, less any estimated residual value, over their expected useful economic life as follows:

<b>Asset class</b>	<b>Amortisation method and rate</b>
Trademarks	10 Year Straight Line

**Tangible fixed assets**

Tangible fixed assets are initially recorded at cost, less any subsequent accumulated depreciation and subsequent accumulated impairment losses.

**Depreciation and amortisation**

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

<b>Asset class</b>	<b>Depreciation method and rate</b>
Leasehold Building	Over the terms of lease
Fixtures & Fittings	5 Year Straight Line
Computer Equipment	3 Year Straight Line

**Fixed asset investments**

**Listed investments**

Listed investments are a form of basic financial instrument and are initially recognised at their transaction value and subsequently measured at fair value at the balance sheet date using the closing quoted market price. The Statement of Financial Activities includes the net gains and losses arising on revaluation and disposals throughout the period. The charity does not acquire or use put options, derivatives or other complex financial instruments.

**Realised gains and losses**

All gains and losses are taken to the Statement of Financial Activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the period end and their carrying value. Realised and unrealised investment gains and losses are combined in the Statement of Financial Activities.

**Cash and cash equivalents**

Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

**Foreign exchange**

Transactions in foreign currencies are recorded at the rate of exchange at the date of the transaction. Monetary assets and liabilities denominated in foreign currencies at the balance sheet date are reported at the rates of exchange prevailing at that date.

The results of overseas operations are translated at the average rates of exchange during the period and their balance sheets at the rates ruling at the balance sheet date. Exchange differences arising on translation of the opening net assets and results of overseas operations are reported in the Statement of Financial Activities.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

## **2 Accounting policies (continued)**

### **Fund structure**

Unrestricted income funds are general funds that are available for use at the trustees discretion in furtherance of the objectives of the charity.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of the designated funds are set out in the notes to the financial statements.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Permanent endowment funds represent those assets which must be held permanently by the charity. Income arising on the permanent endowment funds can be used in accordance with the objects of the charity and is included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund. Investment management fees relating to the endowment investments are charged to unrestricted income funds. In previous periods the investment management fees were charged against the endowment fund.

### **Pensions**

The charitable company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the charitable company in independently administered funds. Contributions are charged to the Statement of Financial Activities as they become payable in accordance with the rules of the scheme.

### **Leasing**

Rentals payable under operating leases are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

### **Financial instruments**

The charity only enters into basic financial instruments that result in the recognition of financial assets and liabilities such as trade and other debtors and creditors together with loans to related parties. Debt instruments, such as trade debtors and creditors, are initially measured at transaction price and subsequently measured at amortised cost.

Financial assets are assessed at the end of each reporting period for objective evidence of impairment. If objective evidence of impairment is found, an impairment loss is recognised in the income statement.

### **Critical accounting judgements and estimation uncertainty**

The preparation of the financial statements in conformity with FRS 102 requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income, and expenses.

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

The charity makes estimates and assumptions concerning the future. The resulting accounting estimates will, by definition, seldom equal the related actual results. The trustees consider that the following critical accounting estimates and judgements have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

To determine the proportion of commissioned projects that have been completed, the trustees use costs incurred as a basis and judge that income to be recognised is equivalent to that. Any actual surplus or deficit is determined at project completion and transferred to or from unrestricted funds.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**3 Income from donations and legacies**

	Unrestricted funds £	Restricted funds £	Total funds £
Donations and gifts	223,194	-	223,194
Gift aid	1,959	-	1,959
<b>Total for 2024</b>	<u>225,153</u>	<u>-</u>	<u>225,153</u>
Donations and gifts	197,415	-	197,415
Gift aid	3,827	-	3,827
<b>Total for 2023</b>	<u>201,242</u>	<u>-</u>	<u>201,242</u>

**4 Income from charitable activities**

	Unrestricted funds £	Restricted funds £	Total funds £
Research projects and sales of reports	420,294	289,401	709,695
<b>Total for 2024</b>	<u>420,294</u>	<u>289,401</u>	<u>709,695</u>
Research projects and sales of reports	419,872	229,194	649,066
<b>Total for 2023</b>	<u>419,872</u>	<u>229,194</u>	<u>649,066</u>

**5 Investment income**

	Unrestricted funds £	Restricted funds £	Total funds £
Income from investments	201,235	-	201,235
General bank interest receivable	4,220	-	4,220
<b>Total for 2024</b>	<u>205,455</u>	<u>-</u>	<u>205,455</u>
Income from investments	103,372	-	103,372
General bank interest receivable	2,629	-	2,629
<b>Total for 2023</b>	<u>106,001</u>	<u>-</u>	<u>106,001</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**6 Expenditure on raising funds**

	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds £
Fundraising for donations	46,606	-	-	46,606
Support costs	13,930	-	-	13,930
<b>Total for 2024</b>	<b>60,536</b>	<b>-</b>	<b>-</b>	<b>60,536</b>
Fundraising for donations	34,451	-	-	34,451
Support costs	-	-	22,522	22,522
<b>Total for 2023</b>	<b>34,451</b>	<b>-</b>	<b>22,522</b>	<b>56,973</b>

**7 Expenditure on charitable activities**

	Note	2024 £	2023 £
Research project costs		649,949	600,727
Lectures and seminars		19,725	17,066
Research and organisational development costs		126,345	114,407
		796,019	732,200
Share of support costs	8	185,480	220,452
		981,499	952,652
<b>Analysis by fund</b>			
Unrestricted funds		793,625	608,455
Restricted funds		187,874	344,197
		981,499	952,652

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**8 Analysis of support costs**

	<b>Support costs</b>	<b>Governance costs</b>	<b>2024 £</b>
Database	982	-	982
Staff cost	36,367	-	36,367
Premises	76,271	-	76,271
General office costs	33,797	-	33,797
Depreciation and leasehold amortisation	13,638	-	13,638
Bank charges and exchange rate difference	1,272	-	1,272
Amortisation of trade marks	830	-	830
Auditor remuneration	-	16,770	16,770
Legal and professional	-	5,553	5,553
	<u>163,157</u>	<u>22,323</u>	<u>185,480</u>
	<b>Support costs</b>	<b>Governance costs</b>	<b>2023 £</b>
Database	1,190	-	1,190
Staff cost	66,056	-	66,056
Premises	72,208	-	72,208
General office costs	33,527	-	33,527
Depreciation and leasehold amortisation	13,204	-	13,204
Bank charges and exchange rate difference	1,589	-	1,589
Amortisation of trade marks	830	-	830
Auditor remuneration	-	15,900	15,900
Legal and professional	-	15,948	15,948
	<u>188,604</u>	<u>31,848</u>	<u>220,452</u>

**9 Trustees remuneration and expenses**

None of the trustees received remuneration for their services nor did they receive any reimbursement of expenses during the year (2023: None).

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**10 Staff costs**

The aggregate payroll costs were as follows:

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Wages and salaries	563,010	532,609
Social security costs	62,458	58,961
Pension costs	37,551	34,423
	<u>663,019</u>	<u>625,993</u>

The number of employees whose emoluments fell within the following bands was:

	<b>2024</b>	<b>2023</b>
	<b>No</b>	<b>No</b>
£60,001 - £70,000	-	1
£70,001 - £80,000	1	-
£90,001 - £100,000	2	2
£120,001 - £130,000	<u>1</u>	<u>1</u>

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £246,564 (2023: £232,705).

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Average number of employees	<u>9</u>	<u>8</u>

**11 Auditors' remuneration**

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Audit of the charity's annual accounts	11,610	10,800
Other services - preparation of the charity's annual accounts	5,160	4,800
Other services - predecessor firm	-	300
	<u>16,770</u>	<u>15,900</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**12 Taxation**

The charity is a registered charity and is therefore exempt from taxation to the extent that such income or gain is applied to charitable purposes.

**13 Pension costs**

The charitable company operates a contributory pension scheme. It is a defined contribution scheme and contributions are charged in the statement of financial activities as they are paid. The charge for the year was £37,551 (2023: £34,423) and the liability outstanding at the year end was £3,540 (2023: £1,709).

**14 Intangible fixed assets**

	<b>Trademark £</b>	<b>Total £</b>
<b>Cost</b>		
At 1 January 2024	8,300	8,300
At 31 December 2024	8,300	8,300
<b>Amortisation</b>		
At 1 January 2024	4,980	4,980
Charge for the year	830	830
At 31 December 2024	5,810	5,810
<b>Net book value</b>		
At 31 December 2024	2,490	2,490
At 31 December 2023	3,320	3,320

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**15 Tangible fixed assets**

	<b>Improvement to leasehold building £</b>	<b>Fixtures and fittings £</b>	<b>Computer equipment £</b>	<b>Total £</b>
<b>Cost</b>				
At 1 January 2024	<u>101,392</u>	<u>9,595</u>	<u>19,541</u>	<u>130,528</u>
At 31 December 2024	<u>101,392</u>	<u>9,595</u>	<u>19,541</u>	<u>130,528</u>
<b>Depreciation</b>				
At 1 January 2024	29,337	5,326	15,753	50,416
Charge for the year	<u>10,139</u>	<u>1,919</u>	<u>1,580</u>	<u>13,638</u>
At 31 December 2024	<u>39,476</u>	<u>7,245</u>	<u>17,333</u>	<u>64,054</u>
<b>Net book value</b>				
At 31 December 2024	<u><u>61,916</u></u>	<u><u>2,350</u></u>	<u><u>2,208</u></u>	<u><u>66,474</u></u>
At 31 December 2023	<u><u>72,055</u></u>	<u><u>4,269</u></u>	<u><u>3,788</u></u>	<u><u>80,112</u></u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**16 Fixed asset investments**

<b>Listed investments</b>	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
<b>Cost or Valuation</b>		
At 1 January	2,729,272	2,598,696
Additions	3,054,546	784,978
Disposals	(3,060,398)	(750,046)
Revaluation	23,367	95,644
	<u>2,746,787</u>	<u>2,729,272</u>
At 31 December	2,746,787	2,729,272
Cash held within investment portfolio	35,387	4,974
	<u>35,387</u>	<u>4,974</u>
At 31 December	<u>2,782,174</u>	<u>2,734,246</u>

**17 Debtors**

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Trade debtors	49,768	-
Prepayments and accrued income	109,216	23,032
Other debtors	23,715	24,493
	<u>182,699</u>	<u>47,525</u>

**18 Cash and cash equivalents**

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Cash at bank	181,680	225,882
Cash held within investment portfolio	35,387	4,974
	<u>217,067</u>	<u>230,856</u>

**19 Creditors: amounts falling due within one year**

	<b>2024</b>	<b>2023</b>
	<b>£</b>	<b>£</b>
Trade creditors	13,106	1,069
Accruals	28,346	27,813
Other creditors	9,838	9,245
Other taxes and social security costs	19,525	18,878
	<u>70,815</u>	<u>57,005</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**20 Funds**

	Balance at 1 January 2024 £	Income £	Expenditure £	Transfers £	Other recognised gains/(losses) £	Balance at 31 December 2024 £
<b>Unrestricted funds</b>						
Unrestricted funds	357,762	705,902	(545,965)	(163,196)	-	354,503
Designated funds	-	145,000	(308,196)	163,196	-	-
<b>Total unrestricted funds</b>	<u>357,762</u>	<u>850,902</u>	<u>(854,161)</u>	<u>-</u>	<u>-</u>	<u>354,503</u>
<b>Restricted funds</b>						
Commission: Study of Antisemitic Attitudes	-	122,451	(40,100)	-	-	82,351
Project: European Jewish Demography Unit	6,920	100,000	(103,247)	-	-	3,673
Jews in the Netherlands: A Socio-Demographic Portrait	-	10,000	(10,000)	-	-	-
Commission: JAMI	3,500	14,000	(4,349)	-	-	13,151
Commission 1: JLC	1,298	-	(1,298)	-	-	-
Jewish Aids Trust	-	6,800	(8,014)	-	-	(1,214)
Maccabi GB	-	15,000	(4,438)	-	-	10,562
Panel Upgrade & Analysis	-	8,650	(7,499)	-	-	1,151
Commission 2: JLC	-	12,500	(8,929)	-	-	3,571
	11,718	289,401	(187,874)	-	-	113,245
<b>Endowment funds</b>						
MCA permanent endowment fund	2,664,600	-	-	-	12,354	2,676,954
<b>Total funds</b>	<u>3,034,080</u>	<u>1,140,303</u>	<u>(1,042,035)</u>	<u>-</u>	<u>12,354</u>	<u>3,144,702</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**20 Funds (continued)**

	Balance at 1 January 2023 £	Income £	Expenditure £	Transfers £	Other recognised gains/(losses) £	Balance at 31 December 2023 £
<b>Unrestricted funds</b>						
Unrestricted funds	368,502	562,115	(318,570)	(254,285)	-	357,762
Designated funds	-	165,000	(324,336)	159,336	-	-
<b>Total unrestricted funds</b>	<u>368,502</u>	<u>727,115</u>	<u>(642,906)</u>	<u>(94,949)</u>	<u>-</u>	<u>357,762</u>
<b>Restricted funds</b>						
Commission: Study of Antisemitic Attitudes	28,800	-	(57,925)	29,125	-	-
Project: Communications	2,972	60,000	(107,492)	44,520	-	-
Project: European Jewish Demography Unit	-	120,000	(113,080)	-	-	6,920
Project: European Commission Mapping	-	3,056	(17,568)	14,512	-	-
Jews in the Netherlands: A Socio-Demographic Portrait	-	40,000	(46,792)	6,792	-	-
Commission: JAMI	-	3,500	-	-	-	3,500
Commission 1: JLC	-	2,638	(1,340)	-	-	1,298
	<u>31,772</u>	<u>229,194</u>	<u>(344,197)</u>	<u>94,949</u>	<u>-</u>	<u>11,718</u>
<b>Endowment funds</b>						
<i>Permanent</i>						
MCA permanent endowment fund	<u>2,601,735</u>	-	<u>(22,522)</u>	-	<u>85,387</u>	<u>2,664,600</u>
<b>Total funds</b>	<u><u>3,002,009</u></u>	<u><u>956,309</u></u>	<u><u>(1,009,625)</u></u>	<u><u>-</u></u>	<u><u>85,387</u></u>	<u><u>3,034,080</u></u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**20 Funds (continued)**

**Endowment funds**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the organising and carrying out of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of these purposes. The income of the Fund may be spent by the Charity on a year to year basis as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000 converted to £3,466,337 at the date transferred) as increased annually by the United Kingdom Retail Prices Index ("RPI").

The original grant is a permanent endowment, the capital of which must be retained.

In order for the realised and unrealised gains to be spent it is necessary to satisfy the following conditions:

(1) The first condition is that the total amount of income and gains spent in any full financial year of the charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the 31st December 2020 to the beginning of the financial year.

(2) The second condition is that 30 days before the trustees resolve to spend the capital, the market value of the capital of the Fund must not be less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward any unspent part of the 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The Fund is invested on professional advice in order to obtain the maximum long-term return (net of any tax) which is regarded from time to time as a prudent target for the Fund.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**20 Funds (continued)**

**Restricted Funds**

The aim and use of each restricted fund is as follows:

(a) Project: Study of Antisemitic Attitudes - first run by JPR together with Ipsos MORI in 2017, this survey, monitoring anti-Jewish and anti-Israel attitudes among the British population, was due to be repeated in 2020. However, due to restrictions imposed by the Covid-19 pandemic, the study was postponed, and is now expected to take place in 2024/25.

(b) Project: Communications - With thanks to support from three key foundations, JPR recruited its first Director of Communications in October 2021. The priorities for the first year of the position are (i) to communicate JPR's research outputs to the media and key target audiences; (ii) to redesign the JPR website; and (iii) to build JPR's social media presence. Work began on all three of these areas in the last quarter of 2021 and the new website was launched in October 2022.

(c) Project: European Jewish Demographic Unit - Established in January 2019, JPR's European Jewish Demography Unit is dedicated to generating data about Jewish populations in Europe to help support community development across the continent. Currently supported by the Rothschild Foundation Hanadiv Europe, it is led by JPR Senior Research Fellow, Dr Daniel Staetsky, and chaired by the world's leading expert in Jewish demography, Professor Sergio Della Pergola.

(d) Project: European Commission Mapping - As part of the EU strategy on combating antisemitism and fostering Jewish life, the European Commission (EC) has committed to creating a European research hub on contemporary antisemitism and Jewish life in the future.

(e) Project: Jews in the Netherlands: A Socio-Demographic Portrait - In 2023, JPR launched the only body systematically analysing contemporary Jewish populations across Europe - launched a major sociodemographic study of Dutch Jewry, part funded by and in partnership with Joods Maatschappelijk Werk (JMW). Drawing on the model from similar projects in Austria and Belgium, this was the first such study to be funded directly by a European Jewish community, rather than solely by our core supporter, the Rothschild Foundation Hanadiv Europe. The project was concluding in 2024.

(f) Commission: Jami / Jewish Care - commissioned JPR to survey the Jewish population in the UK about mental health and elderly care needs and preferences. Questions were included as part of the sixth survey wave, based on the JPR Research Panel, which took place in June-July 2024. The findings were shared in both report form and in bespoke presentations to the clients.

(g) Commission 1: Jewish Leadership Council - JPR was commissioned by the Jewish Leadership Council (JLC) to help construct a questionnaire for the survey carried out by Survation. The second part of this commission was to weigh the data collected by Survation in order to ensure that it was representative of the Jewish population in the UK.

(h) JAT - In September 2024, JPR was commissioned by the Jewish Aids Trust (JAT) to conduct research on relationships and sex education (RSE) in Jewish schools. JPR conducted surveys on year 10 and 11 pupil experiences of RSE in three Jewish schools JPR worked together with Social Finance, who conducted qualitative interviews and focus groups with pupils and teachers.

(i) Maccabi GB - Maccabi GB commissioned JPR to include an agreed set of survey questions in the sixth survey of the JPR Research Panel, conducted in summer 2024, to provide data on the current level of antisemitism in sport.

(j) Panel Upgrade & Analysis - The R & HK Family Foundation supported three specific technological upgrades for JPR's Research Panel and surveys. Firstly they supported a new survey image management system which allowed for a complete redesign of how images are uploaded to our surveys. Secondly, they funded the purchase of two new licences for SPSS Tables, significantly improving our capacity to generate high-quality, professional data tables. Finally, they supported additional technical support from our external consultants allowing JPR to implement new testing for our surveys and to develop short event surveys.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**20 Funds (continued)**

(k) Commission 2: Jewish Leadership Council - This study used data from the JPR National Jewish Identity Survey (NJIS) to examine how different Jewish educational experiences shape adult Jewish identity in the UK. It assessed the long-term impact of interventions including Jewish schooling, youth movements and Israel programmes, while controlling for demographic and family background factors. By applying statistical methods such as principal component and regression analysis, the research identified which interventions most strongly predict outcomes like religiosity and communal engagement.

All the funds represent donations received and take into account the research costs incurred during the year.

**Transfers between funds**

During the year £163,196 was transferred from unrestricted funds to designated funds to cover the deficit on these projects.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**21 Analysis of net assets between funds**

	<b>Unrestricted funds £</b>	<b>Restricted funds £</b>	<b>Endowment funds £</b>	<b>Total funds at 31 December 2024 £</b>
Intangible fixed assets	2,490	-	-	2,490
Tangible fixed assets	66,474	-	-	66,474
Fixed asset investments	105,220	-	2,676,954	2,782,174
Current assets	251,134	113,245	-	364,379
Current liabilities	(70,815)	-	-	(70,815)
<b>Total net assets</b>	<b>354,503</b>	<b>113,245</b>	<b>2,676,954</b>	<b>3,144,702</b>

	<b>Unrestricted funds £</b>	<b>Restricted funds £</b>	<b>Endowment funds £</b>	<b>Total funds at 31 December 2023 £</b>
Intangible fixed assets	3,320	-	-	3,320
Tangible fixed assets	80,112	-	-	80,112
Fixed asset investments	69,646	-	2,664,600	2,734,246
Current assets	261,689	11,718	-	273,407
Current liabilities	(57,005)	-	-	(57,005)
<b>Total net assets</b>	<b>357,762</b>	<b>11,718</b>	<b>2,664,600</b>	<b>3,034,080</b>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2024 (continued)**

**22 Related party transactions**

During the year the charity made the following related party transactions:

**Entities over which the entity has control, joint control or significant influence**

At the balance sheet date the amount due from Entities over which the entity has control, joint control or significant influence was £16,120 (2023 - £16,906).

During a previous period €19,500 was transferred to the Stichting Institute for Jewish Policy Research, an entity registered in the Netherlands under the control of the charity, for working capital purposes. This amount remains outstanding at 31 December 2024 and is included within other debtors, is interest free and repayable on demand.

**23 Operating lease commitments**

At the year end the charity had annual commitments under non-cancellable operating leases as follows

	2024 £	2023 £
Within one year	47,452	47,590
Between two and five years	161,125	163,057
In over five years	54,125	99,645
	<u>262,702</u>	<u>310,292</u>

As disclosed in Note 25, the charitable company served notice under a break clause in the property lease.

**24 Share capital and controlling parties**

The company is limited by guarantee and has no share capital. The liability of its members is limited to £1 per member.

**25 Post balance sheet events**

After the year end the Trustees decided to serve notice under the property lease, disclosed in Note 23, and the property will be vacated during 2026. Negotiations in respect of exit costs relating to dilapidations and property improvements made by the charity are ongoing and at this stage cannot be quantified.

**THE INSTITUTE FOR JEWISH POLICY RESEARCH**

England & Wales - Charity number 252626

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# Accounts

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Company registration number: 00894309

Charity registration number: 252626

# The Institute For Jewish Policy Research

(A company limited by guarantee)

Annual Report and Financial Statements

for the Year Ended 31 December 2023



**The Institute For Jewish Policy Research  
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Report of the Trustees  
For the Year Ended 31 December 2023**

**LEGAL AND ADMINISTRATIVE INFORMATION**

<b>Charity number</b>	252626
<b>Company number</b>	894309
<b>Governing Document</b>	Articles of Association
<b>President</b>	Lord Leigh of Hurley
<b>Honorary President</b>	Lord Rothschild OM
<b>Honorary Vice Presidents</b>	Lord Haskel Harold Paisner Sir Trevor Chinn CVO
<b>Chairman</b>	Stephen Moss CBE
<b>Vice-Chairman</b>	David Ereira
<b>Treasurer</b>	Michael Karp OBE
<b>Executive Director</b>	Dr. Jonathan Boyd
<b>Director of Operations and Company Secretary</b>	Richard Goldstein
<b>Senior Research Fellows</b>	Dr. David Graham Dr. Daniel Staetsky Dr. Carli Lessof Dr Keith Kahn-Harris
<b>Directors and Board of Management</b>	
Stephen Moss CBE	(appointed on 07/09/2010)
Michael Karp OBE	(appointed on 21/01/2015 and terminated on 25/01/2024)
Elizabeth Crossick	(appointed on 29/06/2015 and terminated on 28/06/2024)
Lord Leigh of Hurley	(appointed on 29/06/2015)
Richard Goldstein	(appointed on 05/03/2020)
Miles Webber	(appointed on 17/04/2020 and terminated on 28/06/2024)
William Benjamin	(appointed on 06/07/2020)
Hilda Worth	(appointed on 06/07/2020 and terminated on 20/02/2023)
Professor Jonathan Haskel CBE	(appointed on 28/10/2019)
Mark Berman	(appointed on 10/07/2023)
Denise Joseph	(appointed on 10/07/2023)
Felicia Epstein	(appointed on 24/04/2023)
Dr David Ereira	(appointed on 24/04/2023)
Efrat Sopher	(appointed on 26/01/2024)
<b>Registered office</b>	6 Greenland Place London NW1 0AP England
<b>Auditor</b>	A C Mole LLP Stafford House Blackbrook Park Avenue Taunton, Somerset, TA1 2PX
<b>Bankers</b>	Barclays Bank plc 1 Churchill Place London E14 5HP
<b>Investment Managers</b>	LGT Wealth Management UK LLP 14 Cornhill London EC3V 3NR

**The Institute for Jewish Policy Research  
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Report of the Trustees  
For the Year Ended 31 December 2023**

**Chairman's statement**

The Institute for Jewish Policy Research (JPR) had a highly productive year in 2023, marked by significant achievements, expanded reach, and increased demand for our services.

Working in partnership with Ipsos, we won a groundbreaking competitive tender from the European Commission to conduct a comprehensive survey of public attitudes towards Jews in all 27 EU Member States, the largest and most extensive research project we have ever secured. This project represents a major contribution to understanding antisemitism in Europe, and stands as a fundamental component of the European Commission's ten-year strategy in this area.

At the same time, we also conducted a key study for the European Commission analysing the existing research infrastructure across Europe on antisemitism and contemporary Jewish life. The project was designed to lay the groundwork for the Commission's plan to establish a €3 million research hub for these topics in 2025, which we expect to tender for to coordinate and run in 2025.

We also took significant strides forward in enhancing our research capabilities in the UK. In particular, we made considerable progress developing and utilising our innovative Jewish population research panel, which is designed to enable us to collect and analyse data on key issues facing the community more efficiently and cost-effectively than ever before. This is one of the most important infrastructural projects taking place in the British Jewish community today, and we are working hard to ensure that it attracts the investment it merits.

With the help of the Rothschild Foundation Hanadiv Europe, we also turned our attention to the cultivation of future research talent for the Jewish community. Our new Student Fellowships and internship programmes are creating opportunities for young researchers to work as part of the JPR team and gain valuable professional skills, experience that we hope will help to build a pipeline of research expertise that will benefit Jewish communities in the years to come.

Overall, we produced a record number of research outputs in 2023, covering a wide range of issues affecting Jewish communities. During a very difficult year for Jews everywhere following the horrifying October 7 attacks in Israel, we explored multiple topics, not least how that assault is affecting Jews in the UK and around the world. Yet we also maintained our focus on other critical long-term issues, such as Jewish migration patterns, intermarriage trends, and contemporary Jewish identity. Indeed, 2023 was marked by extensive analysis of our groundbreaking National Jewish Identity Survey, the findings from which we published in early 2024 alongside our new podcast series with JW3, *Jews Do Count*.

Building on the launch of our new website in late 2022, we also significantly enhanced our communications efforts. We increased our social media presence, upgraded our e-newsletter to reach broader target audiences, and produced more accessible and newsworthy content. We also diversified our content delivery methods, running more online events, and producing new short videos, podcasts, and interactive materials to engage with our audiences more effectively.

Looking ahead to next year, one of our greatest challenges is that the demand for our services has outpaced our current capacity. As our reputation and visibility have grown, an increasing number of Jewish communal organisations are approaching JPR for research support. We need more capacity to fulfil our role, particularly in light of the many new challenges facing Jews in a post-October 7 world, and this is an issue that will be high on our agenda going forward.

None of our successes would have been achievable without the financial support of our loyal donors. As ever, I am particularly grateful for the steadfast support of Pears Foundation, the Rothschild Foundation Hanadiv Europe and the Maurice Wohl Charitable Foundation, all of whose long-term investments in our research infrastructure are critical to ensuring that community leaders and professionals have access to the most fundamental data they need to do their work. I am equally thankful for the ongoing support of many others, notably the David and Ruth Lewis Family Charitable Trust, the Bloom Foundation, the Haskel Family Foundation, the Charles Wolfson Charitable Trust, the Kirsh Foundation, the Morris Leigh Foundation, and indeed the many individual donors who give what they can to support the critical role JPR plays in the UK and across Europe.

I extend my gratitude too to two other pivotal groups that have been cornerstones of our progress. First, JPR's trustees, whose shared vision and unwavering support have been vital in helping to steer the Institute through the year and ensuring it continues to maintain the high standards for which JPR is known. In particular, I want to thank the trustees who stepped down after their terms in 2023 and 2024 – Michael Karp, Elizabeth Crossick, Hilda Worth and Miles Webber. Their contributions to JPR will be sorely missed. However, we have also been delighted to welcome David Ereira, Denise Joseph, Felicia Epstein and Mark Berman to the Board in 2023, as well as Efrat

**The Institute for Jewish Policy Research  
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Sopher who joined in early 2024. Looking ahead to my final year as JPR Chairman, I am delighted that we have already appointed my successor, David Ereira, who I am sure will help JPR to achieve further success.

Second, I want to thank the exceptional JPR team for its unwavering commitment and outstanding performance, under the leadership of our Executive Director, Dr Jonathan Boyd. The team is critical to our success, both our exceptional researchers and the wider operations team. We couldn't achieve anything without our staff, and it is a privilege to be able to work with them.

Finally, 2023 saw the sad passing of our Honorary President, Lord Jacob Rothschild. His involvement in JPR went back many decades, and included chairing numerous fundraising dinners and major events with exceptional guest speakers from around the world, including the then Crown Prince of Jordan, Prince Hussein, Henry Kissinger and Lord Wolfensohn, among many others. Lord Rothschild also helped to set up our endowment fund some twenty-five years ago, and helped us to establish our long-term relationship with the Rothschild Foundation Hanadiv Europe, both of which JPR continues to benefit from to this day. We will miss his presence deeply, and extend our heartfelt condolences to his family.



Stephen Moss CBE  
Chairman

Date: 24 September 2024

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Report of the Trustees  
For the Year Ended 31 December 2023**

The trustees present their Annual Report together with the Audited Financial Statements for the year ended 31 December 2023. The Institute for Jewish Policy Research is a charitable company limited by guarantee under registration number 894309 and is registered by the Charity Commission under registration number 252626. Please refer to page 1 for further legal and professional information.

The financial statements have been prepared in accordance with the accounting policies set out in note 2 to the financial statements and comply with the charity's articles of association, the Companies Act 2006 and "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 2019).

**OBJECTIVES AND ACTIVITIES**

The objectives of the charity as set out in the company's Articles of Association are to generate data and insights on major issues concerning Jews in the UK, across Europe and around the world, to ensure that those in positions of responsibility for running or supporting Jewish communities – from major multinational governmental bodies such as the European Union to single-issue Jewish charities – have the data they need to make informed decisions. We work with Jewish organisations of all backgrounds and orientations, to help them understand their populations and meet their needs. We use data and analysis to help Jewish charities and foundations plan effectively for the future, sharing research insights and offering research services and policy advice to support their goals. In this way, we work to support diverse expressions of Jewishness and to reach out to all Jews regardless of their beliefs or practices.

Our expert team conducts research on various topics related to Jewish life. We examine demographic trends such as population size, mortality and fertility rates, age structure and migration patterns. We also explore specific issues such as antisemitism and attitudes to Israel, health and wellbeing, socioeconomics, education, Jewish identity and practice, philanthropy and campus life, providing insights into some of the most urgent challenges facing Jews today. We share our data widely with community leaders and policymakers to support their understanding of contemporary Jewish issues, and to guide their thinking about how to maintain and enhance Jewish life. Our data support charities, foundations and organisations working with Jews and on issues of concern to them, helping schools, elderly care homes, social welfare charities, Jewish community representative organisations, governmental bodies and NGOs to better understand Jewish communities and plan for their future.

We disseminate our research findings in various ways, including symposia and seminars tailored to specific groups, strategic planning days with key communal leaders, training days for staff teams of specific organisations, academic conferences and public events. We share our work on our website and through online and print media, aiming to make it available at all times to target audiences and beyond.

**PUBLIC BENEFIT**

The Institute for Jewish Policy Research is an independent research institute that conducts and disseminates research on contemporary Jewish communities. JPR's research is policy-oriented; it collects and analyses data and makes research available to policymakers, service providers and the general public through online and print publishing, presentations and events.

The Trustees, having carefully considered the Charity Commission's guidance on public benefit, have concluded that:

JPR's aims and activities give clearly identifiable benefits to the public and continue to be charitable. The work particularly benefits the Jewish voluntary sector in the United Kingdom and elsewhere in Europe. Through its pioneering social research, JPR also makes contributions to the wider voluntary sector, by sharing its knowledge and scholarship, thereby benefiting wider society. The benefits are not unreasonably restricted in any way.

**JPR'S WORK IN 2023**

2023 saw JPR undertaking research for organisations ranging from the European Commission to Jami – the UK-based Jewish community mental health charity – and sharing and discussing our findings with leaders from UK organisations including the Jewish Leadership Council, the Board of Deputies of British Jews and the Council of Christians and Jews, and from international bodies such as the European Commission, the European Council of Jewish Communities, and American Jewish Joint Distribution Committee and the Jewish People Policy Institute in Jerusalem. Importantly,

- we secured a major tender – an **EU-wide study of general attitudes towards Jews and Israel sponsored by the European Commission** – a key part of its ten-year strategy to combat antisemitism and foster Jewish life across Europe;

- **we demonstrated the critical value of our UK Jewish population research panel** to Jewish community charities in one of the most important infrastructural projects happening in the Jewish community today;
- **we ran a critical study of British Jews' perceptions and experiences of antisemitism**, to ensure that data series on this topic previously collected by the European Union prior to Brexit was continued – a vital step in measuring how antisemitism is changing in the UK and establishing an essential benchmark against which to assess changes post-October 7;
- **we took a major step forward in our European demographic work securing a critical commission from the Dutch Jewish community**, and ensuring our ongoing capacity to enable European Jewish leaders to plan for their future with full and open access to high-quality empirical evidence.

Our work touched on several key global issues, most notably the 7 October attacks on Israel by Hamas and the subsequent war in Gaza, as well as major internal Jewish community issues including antisemitism, the impact of dynamics in Israel on Jews in the UK and the changing nature of Jewish identity. More generally, we continued to develop and build our internal research infrastructure to help provide data and insights to Jewish community leaders and policymakers more efficiently, and we made improvements to JPR's website to help share our findings more widely and effectively.

## **1. RESEARCH REPORTS PUBLISHED DURING 2023**

We make our reports freely available online and disseminate our findings widely to enhance their impact in the field. In 2023, JPR published nine reports, with several others in progress.

### **1.1. UK REPORTS**

#### ***Conflict in Israel and Gaza (1): What do Jews in the UK think? (March 2023)***

This report looked at the opinions of over 4,000 British Jews, following the May 2021 conflict between Israel and Hamas. Respondents were asked to state how much they agreed or disagreed with two different statements: "Israel's government handled the military aspects of the conflict appropriately" and "Israel's government engaged in the conflict primarily for political rather than military reasons." We found that overall, British Jews supported Israel's right to defend itself militarily in that conflict, but that their support was not uncritical. Moreover, Jews in the UK did not hold uniform views on Israel: levels of attachment to Israel, political leanings in British politics, and educational levels were all found to be key predictors of attitudes. Gathering and analysing these types of data in a systematic way is important for establishing benchmarks against which to assess changes in attitudes over time, which is one of the most important functions JPR serves.

#### ***Conflict in Israel and Gaza (2): Heightened feelings of insecurity among Jews living in the UK (September 2023)***

The second report in this short series examined how the conflict in Israel and Gaza in May 2021 affected Jewish people living in the UK. It asked British Jews to mark their levels of agreement with two contentions: "Because I am Jewish, I felt I was being held responsible by non-Jews for the actions of Israel's government during the conflict," and "Public and media criticism of Israel during the conflict made me feel Jews are not welcome in the UK." The report found that nearly three-quarters (73%) of all UK Jews felt that, as Jews, they were being held responsible in some way by non-Jews for the actions of Israel's government during the conflict, and 56% of respondents said they felt public and media criticism during the conflict made them feel that Jews were unwelcome in the UK. These findings will be used in 2024 to assess any changes in attitudes in the context of the current post-October 7 war.

#### ***What do British Jews think about Israel's leaders and its future? (August 2023)***

In the context of the tensions arising in Israel over the judicial reforms, we investigated the attitudes of British Jews on related issues, namely what they felt about Israeli political leaders, and the future of democratic governance and security in Israel. The study drew on data from two recent surveys: the 2022 National Jewish Identity Survey, undertaken in November/December 2022, just before Israel's current government took power, and the 2023 Antisemitism in the UK survey, undertaken in April/May 2023. We found that 72% of Jews in the UK were pessimistic about the future of democratic governance in Israel, compared to 55% of Israeli Jews; a higher proportion of Jews in the UK were pessimistic about the future of democratic governance in Israel (72%) than about Israel's security situation (58%). These are important benchmark data to help assess change over time.

#### ***How the conflict in Israel and Gaza affects Jews in the UK and what you can do about it (October 2023)***

Just a few days after the October 7 attacks, we published a short paper designed to raise awareness among journalists, politicians and employers of how flare-ups in Gaza can impact Jewish life elsewhere, in an attempt to try to help minimise the anticipated backlash. Drawing on existing data, the paper showed how previous flare-ups were consistently associated with an increase in antisemitism in the UK, how the October 7 attacks would have felt

very personal to many British Jews due to their close emotional and social ties to the country, and how their common sensitivity to extreme criticism of Israel would likely leave many feeling anxious and alienated.

***British attitudes towards Israel at war (November 2023)***

Five weeks after the October 7 attacks, we published this short paper drawing on data from recent polling by Ipsos and YouGov, to shed light on what people in the UK thought about the conflict, where their sympathies lay, and what they believed the British government should do in response to the latest events in Israel and Gaza. It challenged much of the existing Jewish community narrative about public attitudes, demonstrating that sympathies for Israel had climbed dramatically in the immediate aftermath of the attacks and had only fallen slightly subsequently, whereas sympathies for the Palestinians had shown the opposite trend. That said, sympathy levels for Israel among the youngest age band (18-24 year-olds) were consistently found to be very low indeed. We are continuing to monitor these trends over time and will be presenting updated findings in various ways in 2024.

Beyond work on developments in and about Israel, we also continued to work on UK Census data and undertook extensive analysis to complete our report on our National Jewish Identity Survey, which we published and launched in February 2024.

## **1.2 INTERNATIONAL REPORTS**

***Grounding Jewishness: How attached do Jews feel to Israel, Europe and the countries in which they live? (February 2023)***

Following our large-scale study of European Jewish identity in 2021, this was the fourth and final follow-up report that took a closer look at the issue of dual loyalties. It found that Jews tend to feel slightly less attached to the countries in which they live than the general population of those countries, but considerably more attached than other ethnic and religious minorities, and rather more attached to Europe than more or less every other group, including the population at large. Jews in some countries tend to feel more attached to Israel than to the countries in which they live (particularly the case where the Jewish populations include high proportions of recent Jewish immigrants, such as in Germany and Spain), but the reverse is the case in countries with more established Jewish populations.

***The field of research on contemporary antisemitism and Jewish life: Working towards a European research hub (March 2023)***

This report was commissioned from JPR by the European Commission to inform its plan to establish a major new research hub supporting work on contemporary Jewish life and antisemitism in the European Union. The study looked at who is doing work in these fields, what qualifications they hold, which institutions stand behind them and how productive they are. Our findings and recommendations are currently being used to inform the creation of a major new €3million tender from the European Commission, which is part of the Horizon Europe strategic plan for 2025-27. JPR is now working to partner with two or three other research bodies in Europe to submit a joint bid for the project in 2025.

***Jewish migration today: What might it mean for Europe? (July 2023)***

The study, by our European Jewish Demography Unit, looked at patterns of Jewish migration from fifteen European countries, representing 94% of Jews living in Europe. It compared data from recent years to previous periods over the last century, focusing on the signals that current Jewish migration levels from Europe send about how Jews are experiencing and interpreting topical issues. It showed that no European Jewish populations show migration levels at present that might be characterised as critical or even particularly concerning; however, the early signs from Russia and Ukraine in response to the war there suggest that the situation could become acute in both places if migration levels in 2022 and early 2023 continue for several years. Patterns of migration are important to monitor, not least because they can reveal signs of extreme stress, whether caused by antisemitism, conflict or economic crises.

***Intermarriage of Jews and non-Jews: the global situation and its meaning (August 2023)***

Intermarriage has long been a key concern of Jewish leaders and policymakers worldwide, with many claiming that it leads to assimilation, thereby acting as a threat to the existence of Jewish communities across the globe. This report, published by our European Jewish Demography Unit, investigated global Jewish intermarriage rates: it analysed the driving factors behind it, compared the prevalence of intermarriage in countries covering more than 95% of the Jewish population today, and assessed how significant a threat intermarriage is to the sustainability of Jewish communities across the globe by locating intermarriage in the context of Jewish fertility rates and traditionalism.

## **1.3. COMMISSIONED STUDIES FOR CLIENTS**

Undertaking commissioned research for Jewish charities and foundations and governmental and non-governmental bodies is an important part of JPR's work. During 2023, our major research clients were the European

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Commission and Joods Maatschappelijk Werk (JMW), the leading Jewish community organisation in the Netherlands. In addition, we broke important new ground trialling research work for Jami, the UK Jewish mental health charity, using our research panel to generate data to support the very specific research of a UK Jewish community charity.

**European Commission (EC): undertaking policy-critical research with direct impact on combating antisemitism across Europe**

Working together with the global research organisation, Ipsos, JPR won a major €1m commission in 2023 to conduct the first-ever EU-wide study of attitudes to Jews and Israel among the general populations of all 27 EU Member States, and several subpopulations across the continent. The study is a central part of the European Union's 2021-2030 strategy on combating antisemitism and fostering Jewish life in Europe, and JPR won the right to conduct the work in a competitive tender process. The project is expected to take three years, and involves an extensive literature study, the creation of a questionnaire designed both to build on existing research in this area and to break new ground, fieldwork in 27 countries and multiple languages, extensive data analysis, and the production of multiple outputs to help key audiences understand the findings including a full report, report summaries and presentations. Winning the tender is clear evidence of the significant role JPR plays research on antisemitism in Europe, the excellent reputation we have for high quality research, and how the work we undertake is directly tied to policy at both the national and European levels. Of course, ***JPR's capacity to tender for, and win, these types of studies is dependent upon having the appropriate in-house expertise and ethos. Donors who invest in our core infrastructure create the possibility for this type of work to be done by our experts in social research and contemporary Jewish affairs.***

**Joods Maatschappelijk Werk (JMW): providing essential demographic data to support community planning in Europe**

JPR's European Jewish Demography Unit – the only international body undertaking systematic analysis of the demography of contemporary Jewish populations in Europe – secured agreement to undertake a thorough sociodemographic study of the Dutch Jewish population in 2023. The project, which drew on expertise we have developed through similar studies undertaken in recent years in Austria and Belgium, is the first to be directly supported financially by a European Jewish community; previous ones were funded exclusively by the main supporters of our Demography Unit, the Rothschild Foundation Hanadiv Europe. Due to their small population sizes and very limited resources, few European Jewish communities have the capacity to finance these types of studies, yet the work plays a critical role in understanding the basic demographic contours of Jewish populations – particularly their size, age structure, whether they are projected to grow or decline over time, and why. This data, in turn, can and does serve as essential inputs to community leaders charged with making major and often costly communal decisions, such as whether to expand or contract educational or elderly care services, or where to locate new facilities or shut down existing ones. ***JPR is the only organisation anywhere in the world undertaking this type of work for European Jewish communities with genuine academic credibility, and the importance of it for the future of Jewish life cannot be understated: the absence of such data would mean that community leaders and policymakers would effectively be making all such decisions without access to up-to-date reliable demographic data.***

**Jami: using JPR's UK Jewish Population Research Panel for specific charity purposes**

In establishing the world's first Jewish population research panel in 2020, we had two particular goals in mind: (1) to conduct national surveys of the UK Jewish population more efficiently, effectively and frequently than ever before; and (2) to create a facility that would allow individual Jewish charities to survey the UK Jewish population on issues of direct concerns and interest to them. Running credible surveys of Jews in the UK (or indeed, anywhere else in the Diaspora) is extremely complex and costly – it requires the academic expertise to create a representative sample of the Jewish population. Creating such a sample of Jews in Britain is challenging because the Jewish population is (a) very small (less than half a per cent of the total population of the country); (b) difficult-to-define (the boundaries between who is and is not Jewish are contested and blurred), and (c) heavily skewed geographically towards London and its surrounds. At present, the cost of undertaking an academically credible standalone survey of Jews in the UK is estimated at about £120,000; creating a research panel that can be made accessible to individual charities will allow multiple charities to run modules of questions on issues of concerns to them at a fraction of this cost. Yet it has taken time to ensure that the research panel is fully fit for this purpose. In 2023, we successfully worked with Jami to trial a module for them; we went on to develop this work further in 2024 with two further Jewish charities, Jewish Care and Maccabi. The panel is improving all the time, although it will continue to need core infrastructural funding for the foreseeable future. ***This project is a prime example of JPR's vision and ambition to ensure Jewish charities have the data they need to plan for the future, and is unquestionably one of the most important infrastructure projects happening in the UK Jewish community today.***

#### **1.4. RESEARCH REPORTS AND INITIATIVES IN DEVELOPMENT DURING 2023**

The process of preparing each report takes time, and work began in 2023 on a number of other publications that we expect to publish in 2024. These included the National Jewish Identity Survey – the first major study of the identities of British Jews for a decade – and the first-ever nationwide study of the *haredi* (strictly orthodox) population of the UK using our UK Jewish Population Research Panel.

##### **The UK Jewish Population Research Panel: making data about Jews more accessible, relevant and affordable**

Building a sample of any minority population that is small, difficult to define and geographically skewed is scientifically complicated and financially costly. JPR has long been approached by individual Jewish charities with requests for information that would require a full national survey of the Jewish population to gather, but the time and costs associated have typically prompted them to abandon their plans. Our UK Jewish Population Research Panel is designed to address this. The Panel is a unique resource in the Jewish world – it consists of a technologically sophisticated research instrument and a continually developing database of currently 12,000 British Jews that allows us to field both our own surveys of the population, and to run short modules of questions for individual charities. We started to pilot such a module with Jami in 2023, and undertook similar work for Jewish Care and Maccabi in 2024. More generally, we used the research panel in 2023 to run a national survey about Jewish people's perceptions and experiences of antisemitism, and have used it subsequently to run the Haredi survey (detailed below) and our Jewish Current Affairs Survey, examining Jewish life in the aftermath of the 7 October 2023 attacks in Israel and subsequent war in Gaza. Looking ahead, we are working to secure significant investment in the panel infrastructure to enhance the strength and flexibility of this unique tool for the UK Jewish community. ***If Jewish organisations are to be able to plan effectively for the future, they need reliable data. JPR's Research Panel is an entirely unique and visionary initiative in the Jewish world, and is designed to ensure that all Jewish charities have the data they need to understand their members and plan effectively for their future. Donors investing in it are supporting one of the most important infrastructure projects in the British Jewish community, and helping to build a more thoughtful and strategic culture among community leaders.***

##### **The National Jewish Identity Survey (NJIS) – providing essential data to support reflection, creativity and planning**

JPR's 2022 National Jewish Identity Survey is the most thorough and comprehensive assessment of how British Jews express their Jewish identities today. The first such study for almost a decade, it contains key data on multiple issues including synagogue membership and participation, denominational switching, community engagement, religiosity, belief in God, festival and Shabbat observance, attachments to Israel and Britain, Jewish cultural consumption and charitable giving. These are all issues that matter deeply to community leaders and practitioners – the data from this survey provide empirical assessments of how Jews are changing over time and are being used to help community players and members work more thoughtfully and strategically to plan the services they need to provide going forward. The survey has also been carefully constructed to allow individual leaders or organisations to commission in-depth studies about issues of direct concern to them. ***JPR's National Jewish Identity Survey provides an essential reference for all Jewish community leaders and practitioners to understand the populations they seek to serve. No other organisation in the UK does this type of work and the data from the survey will be referenced and utilised in countless seen and unseen ways in Jewish communal work over the coming years.***

##### **The Haredi Survey – breaking new ground in studying one of the most poorly understood parts of the Jewish population**

The Haredi (strictly orthodox) community now comprises about 25% of all Jews in the UK, and due to its rapid growth rate, is projected to reach about a third of the whole by 2040. Religiously conservative and cautious about interaction with wider society (it is the Jewish group most likely to experience antisemitism), it exists largely independently from the mainstream community – it has its own separate organisations, religious bodies, schools and media – and is socioeconomically and demographically distinct too: it is much younger and poorer. As a result, its concerns tend to differ from those of mainstream Jews, so its data needs also differ. JPR's survey of the haredi population of the UK – the first ever national study of this group – is a thoroughly groundbreaking initiative that has seen unprecedented cooperation between JPR and haredi community leaders, and will provide insights about the community that have never previously existed, on topics including education, housing and security. ***JPR is the only organisation in the UK equipped to do this type of work with credibility and sensitivity, and as the growth of the haredi community changes the overall shape and nature of the UK Jewish population, JPR is leading the way in ensuring that community leaders and practitioners understand what those changes mean for the future of Jewish life in the country.***

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**European Jewish Research Archive (EJRA) – maximising access to all research conducted about Jewish life in Europe**

Work progressed on JPR's European Jewish Research Archive (EJRA), a publicly available online archive for research publications on contemporary European communities. First established in 2014, the archive includes social research reports conducted about European Jewish communities since 1990. As of 31 December 2023, the archive contained 4,833 items in 31 languages covering 59 countries; and broke the 5,000 barrier in 2024. ***The Archive is designed to ensure that all research on contemporary Jewish issues – whether undertaken by JPR or by any other institute or individual – is promoted and made available to Jewish community leaders, practitioners, government officials, journalists, researchers and students. In this way, we are working to enhance thinking, understanding and reflection about Jewish life, and building the field of contemporary Jewish research.***

**Fellowships and internships – creating the next generation of researchers**

With the support of the Rothschild Foundation Hanadiv Europe, we launched our new Student Fellowship programme in academic year 2022/23, providing two researchers with 40 days of work experience within JPR, learning research skills through training on real-life experience, and contributing to our research programme. Both had an extremely positive experience: one has subsequently gone on to work for the Board of Deputies of British Jews and the other, after developing a new methodology for the study of the financial resources of Jewish charities, has gone back to pursue more advanced academic qualifications. In addition, we successfully provided short internship opportunities for three students from the University College London and the Universities of Oxford and Bristol, each funded by those universities. ***JPR is committed to developing young researchers and providing them with opportunities to be part of the JPR team and study aspects of contemporary Jewish life. We are the only organisation in the UK focused on this agenda, which promises to serve the community very well in the decades to come.***

**2. PRESENTATIONS, DOWNLOADS AND ACTIVE USE OF JPR RESEARCH DATA AND FINDINGS**

In 2023, JPR presented its work directly to an estimated 2,500 people, at over 30 events in thirteen cities around the world. Among the varied events and presentations were the following:

Date	Client	Detail
January	Belgian Jewish communities	Presented findings from the sociodemographic study of Jews in Belgium at two separate events in Brussels and Antwerp
	Derbyshire Council	Presentation on the latest data about antisemitism
	Board of Deputies	Impact of Covid-19 on Jewish life
February	Global Haredi Research Group	Presentation on haredi population growth to new international academic research group working on issues related to the haredi community
March	JLC/Board of Deputies	Presentation at event held at JW3 looking at the possible implications of the Israeli judicial review for Jewish/non-Jewish relations in the UK
	House of Lords	Major presentation to UK Jewish community leaders on the state of the UK Jewish community in 2023
	European Commission	Presented the findings from the mapping work we undertook for the European Commission at major conference hosted by the EC in Brussels
	European Council of Jewish Communities and JDC	Spoke at the 5 <sup>th</sup> Summit of European Jewish Leaders in Berlin, a major conference with over 400 participants from across the continent.
	Rabbinical Centre of Europe	Presentation at a conference in Vienna where we shared and discussed findings from the JPR report on intermarriage.
April	The Orthonomics podcast	Discussing Jewish demography and population trends in the haredi community

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	West London Synagogue	Spoke on antisemitism and anti-Israelism at West London Synagogue, as part of the synagogue's adult education programme
May	European Jewish Association	Presented findings from JPR paper on intermarriage at a conference organised by the European Jewish Association in Porto
	The Jewish People Policy Institute (JPPI)	Presentation to JPPI/Jerusalem and Israeli Ministry of Foreign Affairs: 'Is antisemitism increasing?'
June	Paideia - the European Institute for Jewish Studies in Sweden	Presented to a group of European Jewish educators who were part of the Paradigm programme
	Interparliamentary Task Force to Combat Online Antisemitism	Presented recent data to summit held in Brussels.
July	European Social Research Association	Presented a conference paper at the 10 <sup>th</sup> Conference of the European Social Research Association in Milan, Italy
	Woolf Institute, Cambridge	Lecture on antisemitism and anti-Zionism to Summer School participants
	Derbyshire County Council	Lecture to Derbyshire County Council on 'Contemporary antisemitism in Great Britain'
	Bloom Foundation	Shared some of our latest sociodemographic research about Jews in the UK and more specifically, Jews in Brighton, to trustees and staff as part of an internal strategic planning seminar
October	Collaborative for Applied Studies in Jewish Educations (CASJE) at George Washington University	Presented our research work on antisemitism as part of a doctoral seminar organised by Dr Bethamie Horowitz
	European Association of Israel Studies	Presentation to annual conference on Israeli Jewish demography
November	'The Professors' (YouTube)	Lecture on sociodemographic origins of the conflict between Jews and Arabs in the Middle East
	JDC	Delivered a presentation on key trends in the UK Jewish community to a group of European Jewish community leaders visiting London for a four-day leadership development seminar.
	Liberal Jewish Synagogue, London	Spoke about the future of the UK Jewish community as part of an adult education series
	Council of Christians and Jews	Spoke at the organisation's annual conference for rabbis and Christian clergy, presenting "What data from the Census of England and Wales tell us about the future of religion in the country."
	Cockfosters United Synagogue	Spoke about the future of Jewish life in the UK at the synagogue's Learning Centre in a session entitled 'Envisioning Anglo-Jewry in 2048'
December	Limmud	Presentation of data relating to our work undertaken on behalf of the Manchester Jewish community

### 3. COMMUNICATIONS

After launching the new and improved JPR website in autumn 2022, our focus in 2023 was on starting to maximise its potential – producing regular new material in multiple new formats (short reports, op. eds., animated videos, event broadcasts, podcasts, etc.), supporting the staff team to create and write such material, enhancing our social media profile, and fundamentally, working to drive more traffic to the site.

Collectively, we increased our research outputs by over 25% from 2022 to 2023, as part of our broader communications plan to ensure that our data and insights could be more regularly, creatively and actively shared with community leaders, practitioners, government officials, journalists and academics.

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More specifically, the **website launch** was accompanied by a major campaign on social media using our newly established pages on Facebook and Instagram, and involving a significant upgrade in the professionalism of our creative and design work including newly produced videos about JPR's work. As a result, between the launch of the site in October 2022 and the end of 2023, we saw:

- Over 160,000 visitors to our website;
- Over 260,000 pages viewed;
- Nearly 9,000 file downloads;
- Nearly 3.5 million impressions on Google search;
- Over 120,000 clicks from Google search results.

As part of the 2022 **National Jewish Identity Survey**, we designed and executed a digital marketing campaign to attract current and new panel members to complete the survey, resulting in over 4,700 participants, of whom 1,300 registered during the campaign. These individuals are part of our broader campaign to develop our research panel, so our work in 2023 was focused on continuing to engage them in our work, and retaining them to participate in future surveys. This priority was also a key focus of our **Antisemitism in the UK Survey** in April/May 2023, for which we designed and executed a digital marketing campaign to attract current and new panel members to complete the survey. As of the end of 2023, the panel had some 9,000 British Jewish adults signed up.

In preparation for the launch of the National Jewish Identity Survey, we established a fruitful partnership with JW3 – London's Jewish community centre – to run our **new podcast series, *Jews Do Count***. Produced by Earshot Strategies and promoted in collaboration with the *Jewish News*, the podcast was conceived and planned in 2023, before being launched on all major platforms in early 2024. During the seven weeks the first series ran, it featured as the top British Jewish podcast reaching over 5,000 subscribers.

Towards the end of 2022, we unveiled the first results from the **2021 UK Census**, providing some of the most fundamental demographic data about Jews in the UK. From a communications perspective, part of the goal was to help position JPR's report as the number one Google result for searching "Jews in the UK". In 2023, the report's page was the most viewed page on our website in 2023, with over 20,000 views.

More generally, all JPR reports and events were accompanied by a press release sent to the relevant outlets. JPR's work was directly featured in over 100 times in **major news outlets** in 2023 and referenced close to 1,000 times on other websites.

In addition to our reports and papers, we began to produce far more **articles about our research findings** than in previous years, most commonly for the Jewish press, to maximise access to our work in a more digestible format. Analysis of our website demonstrates that these short 'insights' are the most popular format among our users. Our small team generated twenty such articles over the course of 2023, on a range of topics including the impact of the war in Ukraine on Ukrainian Jews, how demographic changes in Israel are affecting its politics, patterns of Jewish migration and why more Israelis are projected to move to the UK, and how the COVID-19 pandemic affected Jewish life. These articles help raise awareness about JPR and its work and promote the use of data in understanding community trends and issues.

## **PERFORMANCE**

JPR had a successful 2023. We won the largest and most extensive competitive research tender we have ever secured, partnering with Ipsos to undertake a major new €1 million survey of public attitudes to Jews in all 27 EU Member States for the European Commission. We published a groundbreaking map and assessment of the fields of contemporary Jewish studies and antisemitism to support the European Commission's plans to establish an EU-wide research hub for these topics, a major €3 million project which we will look to tender for in 2025. We made significant progress with our UK Jewish population research panel, enhancing our capacity to run surveys of the UK Jewish population that will enable us to maximise its value to community organisations in the future, and attract new sources of funding. We produced a record number of outputs, covering a wide range of issues from migration, intermarriage and contemporary Jewish identity to major contemporary challenges associated with the October 7 attacks on Israel, the war in Gaza and antisemitism in Britain. We established our new student fellows and internship programmes, creating dynamic opportunities for young researchers to gain professional skills and experience, and working to sow the seeds of research expertise for Jewish communities in the future. After launching our new and improved organisational website at the end of 2022, we made significant progress on our communications work, stepping up our efforts on social media, upgrading our e-newsletter to reach more of our target audiences, producing more digestible and newsworthy outputs and sharing them in new and creative ways through online events, short videos, podcasts and interactive materials. established a new intern programme to help cultivate young researchers for the Jewish community whilst also adding to our capacity and outputs.

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JPR's services are more in demand than ever. As we have enhanced our communications work, we are being approached by increasing numbers of organisations requesting research support, and our greatest challenge is that we simply do not have sufficient capacity to do everything we are asked. *As we work to enhance and strengthen our team, we will actively seek out supporters to help us to address this challenge: our skills and expertise are clearly valued and needed by leaders and policymakers working within and beyond the Jewish community, but we have to find new ways to continue to build the research infrastructure required to meet demand.*

**FINANCIAL REVIEW FOR THE YEAR**

The results for the year are shown in the Statement of Financial Activities on page 20.

JPR's income continues to come from four main sources: grants from foundations; commissioned work and donations, and the MCA Endowment.

In 2023, JPR secured a total of £201,242 in unrestricted donations (2022 - £153,524). In addition, unrestricted income for research projects and reports totalled £649,066 (2022 - £699,440). 2023 unrestricted income included the second year of a major investment of £600,000 from the Rothchild Foundation to be distributed over four years, £105,000 from the Pears Foundation and £75,000 from the Maurice Wohl Charitable Foundation, as well as an increased donation of £50,000 from the David and Ruth Lewis Family Charitable Trust. We really value the continued support of these foundations. We were also very grateful for the sizable and repeated donations from the Charles Wolfson Charitable Trust, and the Bloom, Haskel Family, Kirsch and Morris Leigh Foundations. Also, a one off legacy donation from the Maurice Freeman Research Trust was very much appreciated. Income from commissioned work brought in £229,194 in 2023 (2022 - £240,946).

The financial prospects for JPR in 2024 are promising, bolstered by continued contributions from the Rothschild Foundation, our steadfast major donors, and the anticipated revenue from the European Commission tender secured in mid-2023. We anticipate that the expansion of JPR's research programme and the strengthening of our communication capabilities will significantly increase both the visibility of the Institute's initiatives and the financial contributions towards them. This strategic enhancement is designed to elevate the Institute's profile and attract additional resources to support its mission.

The value of JPR's endowment fund was £2,734,246 at the end of 2023. This marks an increase from the start of the year of 2.6% (£2,665,530). The income attained from the fund's investment was £103,991.

It is prudent to acknowledge that several of the Charity's multi-year grants are approaching their renewal phase in 2024. The Institute remains optimistic about retaining the majority, if not all, of these grants, whether they continue on a multi-year term or transition to an annual cycle. Nonetheless, there always exists a risk of non-renewal – that is the nature of charitable work. The Charity is dedicated to maintaining transparent communication with its donors regarding ongoing work and prospective initiatives, ensuring that they are well known and understood by all donors.

The Institute's fundraising efforts in 2023 were challenged by the absence of a fundraiser. However, the commitment to donor retention was unwavering, and the majority of existing donors continued their support. Although the pursuit of new funding avenues was limited, the search for a permanent qualified fundraiser continued throughout the year and into 2024 unabated, and was aided by the appointment of a fundraising consultant on a three-month, part-time basis in early 2024. As of the date of this report, the services of a new and experienced fundraiser have been found and the candidate will join the team in September 2024.

**RESERVES POLICY**

JPR's reserves policy is to seek to hold three to six months of expenditure on overheads. This would amount to between £252,406 and £504,812. As of 31 December 2023, there were unrestricted funds of £357,762, which is in line with the target range as set out above. Of these funds £3,320 were held as intangible fixed assets, £80,112 as tangible fixed assets and £69,646 as fixed asset investments leaving free reserves of £204,684.

JPR has adopted this policy to cover the risk of any unforeseen emergencies, such as unexpected IT costs or day-to-day operational costs, such as employing temporary staff to cover sickness absence during major projects. The policy is designed to deal with fluctuations in income, such as late payments for commissioned work or large grants being delayed or not renewed. The reserves will ensure any expenditure is covered on preparatory work on projects, as well as any necessary organisational development costs not covered by income.

The policy of holding three to six months' reserves will enable JPR to develop new sources of finance or cut back on expenditure should an emergency arise. In the meantime, such a prudent policy provides a stable base for JPR's research and the dissemination of the results to assist Jewish communities in the UK and continental Europe.

**The Institute for Jewish Policy Research  
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**PERMANENT ENDOWMENT INVESTED IN TOTAL RETURN BASIS**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the preparation and production of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe, together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of the said purposes. Further details on the fund are disclosed in note 20 to the financial statements.

During 2023, the fund was invested in a discretionary agreement with abdrn (formerly Aberdeen Standard Capital) with the aim of maximising the long-term return whilst providing a good level of income as agreed with the Board.

The Board has adopted an ethical policy for the investment of these funds, namely, not to invest in any companies involved in the manufacture and distribution of tobacco and arms or any companies that boycott Israel.

**RISK ASSESSMENT**

Risk management is reviewed regularly by staff and a Risk Register is submitted to the Board for approval on an annual basis. The Directors have identified the main risks to which the charitable company is exposed and have taken steps to mitigate them.

**LOOKING AHEAD**

JPR will be focusing on a wide range of projects in 2024, including:

- **A major new study of attitudes towards Jews in all 27 EU Member States, conducted under the auspices of the European Commission.** The JPR team will be working with the international research agency, Ipsos, and leading a multinational group of specialists in antisemitism and social research to conduct the first ever EU-wide study of antisemitic attitudes. The study, which stands at the heart of the European Commission's ten-year strategy to combat antisemitism across Europe, is being designed to break new ground in measuring and understanding anti-Jewish attitudes and will have a direct impact on EU policy going forward.
- **Launching the findings from the National Jewish Identity Survey, the most thorough study of British Jewish life for a decade.** The key findings report from this landmark survey were published in February 2024 alongside a brand-new podcast series, *Jews Do Count*, produced in partnership with JW3 (London's Jewish community centre). The data from the survey will be used in multiple ways throughout 2024, including presentations of key findings to community leaders, policymakers, professionals and donors, short follow-up reports on topical issues, and new commissioned studies for clients eager to understand the data in more detail.
- **Running the first-ever national survey of the UK Haredi (strictly Orthodox) population, to generate essential data about this rapidly growing part of the British Jewish community.** The Haredi Survey is a completely groundbreaking study; no other organisation has ever managed to conduct a large and comprehensive quantitative survey of haredi Jews in Britain, and it has taken two years of preparation to achieve it. The fieldwork took place successfully in early 2024, and the results will provide key insights about haredi Jews on issues including housing, education and antisemitism. The findings will be used to inform policy both within and for the haredi community.
- **Running a major national survey of Jews in the UK to assess the impact of the October 7 attacks in Israel, the war in Gaza, and rising antisemitism in the UK on British Jews.** The October 7 attacks in Israel are widely regarded as a turning point for Jews everywhere, but JPR is the only organisation conducting a comprehensive survey to assess this in an academically credible and impartial way. Our study will look at how it has affected British Jews' views about Israel's political and military conduct during the war, how it has impacted their sense of security in Britain, and how it is affecting their levels of attachment to Israel and the UK Jewish community.
- **Completing our full sociodemographic study of Jewish in the Netherlands.** This will be the third full country study we will have completed under the auspices of our European Jewish Demography Unit. Each one involves extensive data collection and tremendous attention to detail, and becomes the foundational reference point for community planning in each place. These types of demographic data are absolutely fundamental to the functioning of any community; they explain the demographic size and shape of the community, its prospects for growth, and the forces that will affect that over time.

**The Institute for Jewish Policy Research  
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For the Year Ended 31 December 2023**

More generally, we will be:

- working to ensure a **smooth handover of the chairmanship of JPR**, in preparation for when David Ereira officially takes over from Stephen Moss as Chair in January 2025;
- integrating new trustees into the organisation, including **running a strategic review** particularly in light of the October 7 attacks in Israel and how they may impact JPR's work;
- recruiting a new fundraiser and upgrading our **fundraising strategy and approach**;
- producing more newsworthy reports and insights to help **enhance the public profile of the organisation**, and developing new methods of sharing them;
- working to **upgrade the quality and depth of research on antisemitism** in the UK, in order to better understand public opinion both within and beyond the Jewish community and align UK and international assessments.

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Institute for Jewish Policy Research (JPR) is a registered charitable company and a company limited by guarantee. JPR is governed by its Articles of Association and by the regulations of the Charity Commission and company law.

JPR's governance structure consists of the Board of Directors and a working group of Honorary Officers (Chair and Treasurer), who oversee management matters. Members of the Board are non-executive Directors and Trustees of the charitable company. They determine the overall direction of JPR, provide leadership and fulfil their fiduciary responsibilities.

Trustees are appointed (or reappointed, as the case may be) for a three-year term of office on the recommendation of the Chairman and require approval by the Board. Under usual circumstances, Trustees can serve a maximum of three consecutive terms of office. An amendment was added to the Articles of Association in 2017, allowing for the possibility of further extensions in special circumstances. This amendment was passed by adopting a Special Resolution at the General Meeting of the Company on October 23rd, 2017. It was determined that any further additional term or terms (of any such length as is determined by the Trustees), would need to be approved at a meeting of the Trustees.

The Trustees must appoint a Chairman from among their number. An amendment was added to the Articles of Association in 2021 to allow the Chairman to serve for three three-year terms, instead of two, and this may be extended by a single year as an emergency measure. The Chairman may only hold office for such time as he or she is a Trustee.

On acceptance to the Board, the Trustees receive the JPR Governance Handbook, which outlines JPR's governance structure and the responsibilities of Board members, and up-to-date documentation on the Institute's aims and programmes.

At all times there must be a President of the Charity, who is appointed by the Trustees. The President may also be a Trustee of the Charity if appointed as such by the Trustees. The President holds office for a three-year term and may be reappointed by the Trustees for any number of further three-year terms as the Trustees see fit.

The Board appoints the Executive Director, who reports to the Board on the substantive areas of the Institute's management. The Board can appoint a Company Secretary who oversees the work in matters of compliance with company and charitable company law. While day-to-day matters are delegated to the staff, all substantive decisions are referred to the Board for approval.

The Board also appoints a Finance Committee which meets regularly during the year to oversee the annual audit, investment strategy and charge-out rate for commissions and to carry out an annual financial review; a Fundraising Committee which sets out and supports the fundraising strategy and monitors its progress during the year; and a Nominations Committee to oversee succession planning for the JPR Board and Committees. In addition, the Chairman and the Treasurer both review staff salaries each year and must approve any changes.

The Members of the Board of Directors who served during 2023 are:

Stephen Moss CBE (Chairman)	(appointed 07/09/2010)
Michael Karp OBE (Treasurer)	(appointed on 21/01/2015 and terminated on 25/01/2024)
Elizabeth Crossick	(appointed on 29/06/2015 and terminated on 28/06/2024)
Lord Leigh of Hurley (President)	(appointed 29/06/2015)
Richard Goldstein	(appointed 05/03/2020)
Miles Webber	(appointed on 17/04/2020 and terminated on 28/06/2024)

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William Benjamin	(appointed 17/04/2020)
Hilda Worth	(appointed 06/07/2020 and terminated on 20/02/2023)
Jonathan Haskel CBE	(appointed 28/10/2019)
Mark Berman	(appointed 10/07/2023)
Denise Joseph	(appointed 10/07/2023)
Felicia Epstein	(appointed 24/04/2023)
Dr David Ereira	(appointed 24/04/2023)
Efrat Sopher	(appointed 26/01/2024)

Hilda Worth retired from the Board in the early part of the year due to other commitments, and we thank her for the many contributions she made to JPR's work. Four new appointments were made during the course of 2023, in the knowledge that several trustees were approaching the end of their third terms, and a fifth, Efrat Sopher, joined in January 2024. These new appointments included David Ereira, who was appointed Vice-Chairman in early 2024 and will be replacing Stephen Moss as Chairman from 1 January 2025, and Denise Joseph, who replaced Mike Karp as Treasurer in early 2024.

JPR also has three Honorary Vice Presidents, who hold a general oversight role as required: Lord Haskel, Harold Paisner and Sir Trevor Chinn.

The key management personnel comprise the Executive Director and the Director of Operations. The Chairman and Treasurer review the salaries of all employees annually, including the above-mentioned two key management personnel, with reference to their duties and responsibilities, having regard to the resources of JPR, charity remuneration benchmarks and employment legislation.

#### **Auditors**

In accordance with Section 485 of the Companies Act 2006, a resolution proposing that A C Mole LLP be reappointed as auditors of the company will be put to the Annual General Meeting.

#### **STATEMENT OF TRUSTEES' RESPONSIBILITIES**

The trustees (who are also directors of The Institute For Jewish Policy Research for the purposes of company law) are responsible for preparing the Trustees' Report (incorporating the directors' 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 the group] 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 hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

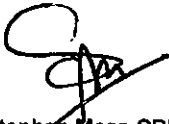
In so far as the trustees are aware:

- 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 Institute for Jewish Policy Research  
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For the Year Ended 31 December 2023**

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.

The trustees' report was approved by the Board of Trustees.



Stephen Moss CBE  
Chairman

Date: 24<sup>th</sup> September 2024

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report to the Trustees  
For the Year Ended 31 December 2023**

**Independent auditor's report to the Trustees of The Institute for Jewish Policy Research**

**Opinion**

We have audited the financial statements of The Institute for Jewish Policy Research ('the charitable company') for the year ended 31 December 2023 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards comprising Charities SORP – FRS 102 'The Financial Reporting Standard 102: The Financial Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 December 2023 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 Charities Act 2011.

**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 charitable company 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 charitable company's ability to continue as a going concern for a period of at least 12 months from when the financial statements are authorised for issue.

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

**Other information**

The other information comprises the information included in the annual report, including the trustees' report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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.

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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report to the Trustees  
For the Year Ended 31 December 2023**

**Matters on which we are required to report by exception**

In the light of the knowledge and understanding of the company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report included within the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion:

- adequate and proper 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 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 the trustees 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 charitable company'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 charitable company or to cease operations, or have no realistic alternative but to do so.

**Auditor's 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 is detailed below:

**Identifying and assessing potential risks of material misstatement due to irregularities**

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the charitable company operates
- the nature of the sector in which the charitable company operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities
- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the charitable company charity include those relating to the requirements of the financial reporting framework FRS102, the Companies Act 2006, the Charities Act 2011, UK tax legislation, the Charity Commission, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the charitable company.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditor's Report to the Trustees  
For the Year Ended 31 December 2023**

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

**Audit responses to risks identified**

We undertook audit procedures to respond to the risks identified and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the charitable company's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities is available 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 section 144 of the Charities Act 2011. Our audit work has been undertaken so that we might state to the charitable company'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 charitable company and the charitable company's trustees as a body, for our audit work, for this report, or for the opinions we have formed.

A C Mole LLP is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006.

*AC Mole LLP*

.....  
A C Mole LLP (Senior Statutory Auditor)  
Chartered Accountants and Statutory Auditor  
Stafford House  
Blackbrook Park Avenue  
Taunton  
Somerset  
TA1 2PX

Date: *24<sup>th</sup> September 2024*

**The Institute For Jewish Policy Research**  
**Statement of Financial Activities for the Year Ended 31 December 2023**  
**(Including Income and Expenditure Account)**


	Note	Unrestricted funds £	Restricted funds £	Endowment funds £	Total 2023 £
<b>Income</b>					
Donations and legacies	3	201,242	-	-	201,242
Charitable activities	4	419,872	229,194	-	649,066
Investment income	5	106,001	-	-	106,001
Total income		<u>727,115</u>	<u>229,194</u>	<u>-</u>	<u>956,309</u>
<b>Expenditure</b>					
Raising funds	6	(34,451)	-	(22,522)	(56,973)
Charitable activities	7	(608,455)	(344,197)	-	(952,652)
Total expenditure		<u>(642,906)</u>	<u>(344,197)</u>	<u>(22,522)</u>	<u>(1,009,625)</u>
Gains/(losses) on investment assets		<u>-</u>	<u>-</u>	<u>85,387</u>	<u>85,387</u>
Net income/(expenditure)		<u>84,209</u>	<u>(115,003)</u>	<u>62,865</u>	<u>32,071</u>
Transfers between funds		<u>(94,949)</u>	<u>94,949</u>	<u>-</u>	<u>-</u>
Net movement in funds		<u>(10,740)</u>	<u>(20,054)</u>	<u>62,865</u>	<u>32,071</u>
<b>Reconciliation of funds</b>					
Total funds brought forward		<u>368,502</u>	<u>31,772</u>	<u>2,601,735</u>	<u>3,002,009</u>
Total funds carried forward	20	<u>357,762</u>	<u>11,718</u>	<u>2,664,600</u>	<u>3,034,080</u>
	Note	Unrestricted funds £	Restricted funds £	Endowment funds £	Total 2022 £
<b>Income</b>					
Donations and legacies	3	153,524	-	-	153,524
Charitable activities	4	458,494	240,946	-	699,440
Investment income	5	100,310	-	-	100,310
Total income		<u>712,328</u>	<u>240,946</u>	<u>-</u>	<u>953,274</u>
<b>Expenditure</b>					
Raising funds	6	(53,427)	-	(18,777)	(72,204)
Charitable activities	7	(613,213)	(371,776)	-	(984,989)
Total expenditure		<u>(666,640)</u>	<u>(371,776)</u>	<u>(18,777)</u>	<u>(1,057,193)</u>
Gains/(losses) on investment assets		<u>-</u>	<u>-</u>	<u>(237,764)</u>	<u>(237,764)</u>
Net income/(expenditure)		<u>45,688</u>	<u>(130,830)</u>	<u>(256,541)</u>	<u>(341,683)</u>
Transfers between funds		<u>(53,870)</u>	<u>53,870</u>	<u>-</u>	<u>-</u>
Net movement in funds		<u>(8,182)</u>	<u>(76,960)</u>	<u>(256,541)</u>	<u>(341,683)</u>
<b>Reconciliation of funds</b>					
Total funds brought forward		<u>376,684</u>	<u>108,732</u>	<u>2,858,276</u>	<u>3,343,692</u>
Total funds carried forward	20	<u>368,502</u>	<u>31,772</u>	<u>2,601,735</u>	<u>3,002,009</u>

The notes on pages 23 to 39 form an integral part of these financial statements.

**The Institute For Jewish Policy Research**  
**(Registration number: 00894309)**  
**Balance Sheet as at 31 December 2023**

	Note	2023 £	2022 £
<b>Fixed assets</b>			
Intangible assets	14	3,320	4,150
Tangible assets	15	80,112	88,622
Investments	16	<u>2,734,246</u>	<u>2,665,530</u>
		<u>2,817,678</u>	<u>2,758,302</u>
<b>Current assets</b>			
Debtors	17	47,525	78,253
Cash at bank and in hand	18	<u>225,882</u>	<u>234,313</u>
		273,407	312,566
<b>Creditors: Amounts falling due within one year</b>	19	<u>(57,005)</u>	<u>(68,859)</u>
<b>Net current assets</b>		<u>216,402</u>	<u>243,707</u>
<b>Net assets</b>		<u>3,034,080</u>	<u>3,002,009</u>
<b>Funds of the charity:</b>			
Unrestricted funds		357,762	368,502
Restricted funds		11,718	31,772
Endowment funds		<u>2,664,600</u>	<u>2,601,735</u>
<b>Total funds</b>	20	<u>3,034,080</u>	<u>3,002,009</u>

The financial statements on pages 20 to 39 were approved by the trustees, and authorised for issue on 24/9/23 and signed on their behalf by:

  
.....  
Stephen David Moss CBE  
Chairman and trustee

**The Institute For Jewish Policy Research**  
**Statement of Cash Flows for the Year Ended 31 December 2023**

	Note	2023 £	2022 £ (As restated)
<b>Cash flows from operating activities</b>			
Net cash income/(expenditure)		32,071	(341,683)
<b>Adjustments to cash flows from non-cash items</b>			
Depreciation	15	13,204	13,178
Amortisation	14	830	830
Investment income	5	(106,001)	(100,310)
Loss on disposal of investments		10,257	22,282
Revaluation of investments		<u>(95,644)</u>	<u>215,482</u>
		(145,283)	(190,221)
<b>Working capital adjustments</b>			
Decrease/(increase) in debtors	17	30,728	(42,198)
(Decrease)/increase in creditors	19	<u>(11,854)</u>	<u>7,095</u>
Net cash flows from operating activities		<u>(126,409)</u>	<u>(225,324)</u>
<b>Cash flows from investing activities</b>			
Interest receivable and similar income	5	106,001	100,310
Purchase of tangible fixed assets	15	(4,694)	-
Purchase of investments	16	(784,978)	(586,956)
Sale of investments		<u>739,790</u>	<u>570,022</u>
Net cash flows from investing activities		<u>56,119</u>	<u>83,376</u>
Net decrease in cash and cash equivalents		(70,290)	(141,948)
Cash and cash equivalents at 1 January		<u>301,146</u>	<u>443,094</u>
Cash and cash equivalents at 31 December		<u><u>230,856</u></u>	<u><u>301,146</u></u>

The notes on pages 23 to 39 form an integral part of these financial statements.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023**

**1 Charity status**

The charity is limited by guarantee, incorporated in England & Wales, and consequently does not have share capital. Each of the trustees is liable to contribute an amount not exceeding £1 towards the assets of the charity in the event of liquidation.

The address of its registered office is:  
6 Greenland Place  
London  
NW1 0AP

**2 Accounting policies**

**Summary of significant accounting policies and key accounting estimates**

The principal accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all the years presented, unless otherwise stated.

**Basis of preparation and statement of compliance**

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes. 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)) (issued in October 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

The Institute For Jewish Policy Research meets the definition of a public benefit entity under FRS 102.

The presentation currency of the financial statements is the Pound Sterling (£).

**Going concern**

The trustees consider that there are no material uncertainties about the charity's ability to continue as a going concern nor any significant areas of uncertainty that affect the carrying value of assets held by the charity.

**Income**

All income is recognised once the charity has entitlement to the income, it is probable that the income will be received and the amount of the income receivable can be measured reliably.

**Donations**

Donations are recognised when the charity has been notified in writing of both the amount and settlement date. In the event that a donation is subject to conditions that require a level of performance by the charity before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity and it is probable that these conditions will be fulfilled in the reporting period.

If there is a Service Level Agreement or Contract in place income from administration charges is taken into account in the period to which it relates.

For legacies, entitlement is the earlier of the charity being notified of an impending distribution or the legacy being received. At this point income is recognised. On occasion legacies will be notified to the charity however it is not possible to measure the amount expected to be distributed. On these occasions, the legacy is treated as a contingent asset and disclosed.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**2 Accounting policies (continued)**

**Donated services and facilities**

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

**Investment income**

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. Dividends are recognised once the dividend has been declared and notification has been received of the dividend due.

**Expenditure**

All expenditure is recognised once there is a legal or constructive obligation to that expenditure, it is probable settlement is required and the amount can be measured reliably. All costs are allocated to the applicable expenditure heading that aggregate similar costs to that category. Where costs cannot be directly attributed to particular headings they have been allocated on a basis consistent with the use of resources.

**Raising funds**

These are costs incurred in attracting voluntary income, the management of investments and those incurred in trading activities that raise funds.

**Charitable activities**

Charitable expenditure comprises those costs incurred by the charity in the delivery of its activities and services for its beneficiaries. It includes both costs that can be allocated directly to such activities and those costs of an indirect nature necessary to support them.

**Support costs**

Support costs are those that assist the work of the Charity but do not directly represent charitable activities and include office costs, governance costs and administrative payroll costs. They are incurred directly in support of expenditure on the objects of the charity. Where support costs cannot be directly attributed to particular headings they have been allocated to costs of raising funds and expenditure on charitable activities on a basis consistent with use of the resources. Support costs detailed in the notes are allocated on the basis apportionment of the time spent on these activities.

**Governance costs**

Governance costs are included within support costs and comprise all costs associated with meeting the constitutional and statutory requirements of the charity and include professional fees and costs linked to the strategic management of the charity.

**Irrecoverable VAT**

Irrecoverable VAT is charged against the category expenditure for which it was incurred.

**Taxation**

The charity is a registered charity and is, therefore, exempt from liability to taxation on its income and capital gains, to the extent that such income or gains are applied exclusively to charitable purposes.

**Intangible assets**

Intangible assets are stated in the Balance Sheet at cost less accumulated amortisation and impairment. They are amortised on a straight line basis over their estimated useful lives.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**2 Accounting policies (continued)**

**Amortisation**

Amortisation is provided on intangible fixed assets so as to write off the cost, less any estimated residual value, over their expected useful economic life as follows:

<b>Asset class</b>	<b>Amortisation method and rate</b>
Trademarks	10 Year Straight Line

**Tangible fixed assets**

Tangible fixed assets are initially recorded at cost, less any subsequent accumulated depreciation and subsequent accumulated impairment losses.

**Depreciation and amortisation**

Depreciation is provided on tangible fixed assets so as to write off the cost or valuation, less any estimated residual value, over their expected useful economic life as follows:

<b>Asset class</b>	<b>Depreciation method and rate</b>
Leasehold Building	Over the terms of lease
Fixtures & Fittings	5 Year Straight Line
Computer Equipment	3 Year Straight Line

**Fixed asset investments**

**Listed investments**

Listed investments are a form of basic financial instrument and are initially recognised at their transaction value and subsequently measured at fair value at the balance sheet date using the closing quoted market price. The Statement of Financial Activities includes the net gains and losses arising on revaluation and disposals throughout the period. The charity does not acquire or use put options, derivatives or other complex financial instruments.

**Realised gains and losses**

All gains and losses are taken to the statement of financial activities as they arise. Realised gains and losses on investments are calculated as the difference between sales proceeds and their opening carrying value or their purchase value if acquired subsequent to the first day of the financial year. Unrealised gains and losses are calculated as the difference between the fair value at the period end and their carrying value. Realised and unrealised investment gains and losses are combined in the Statement of Financial Activities.

**Cash and cash equivalents**

Cash and cash equivalents comprise cash on hand and call deposits, and other short-term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

**Foreign exchange**

Transactions in foreign currencies are recorded at the rate of exchange at the date of the transaction. Monetary assets and liabilities denominated in foreign currencies at the balance sheet date are reported at the rates of exchange prevailing at that date.

The results of overseas operations are translated at the average rates of exchange during the period and their balance sheets at the rates ruling at the balance sheet date. Exchange differences arising on translation of the opening net assets and results of overseas operations are reported in the Statement of Financial Activities.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**2 Accounting policies (continued)**

**Fund structure**

Unrestricted income funds are general funds that are available for use at the trustees discretion in furtherance of the objectives of the charity.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of the designated funds are set out in the notes to the financial statements.

Restricted income funds are those donated for use in a particular area or for specific purposes, the use of which is restricted to that area or purpose.

Permanent endowment funds represent those assets which must be held permanently by the charity. Income arising on the permanent endowment funds can be used in accordance with the objects of the Charity and is included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund. Investment management charges and legal advice relating to the fund are charged against the fund.

**Pensions**

The charitable company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the charitable company in independently administered funds. Contributions are charged to the Statement of Financial Activities as they become payable in accordance with the rules of the scheme.

**Leasing**

Rentals payable under operating leases are charged to the Statement of Financial Activities on a straight line basis over the period of the lease.

**Financial instruments**

The charity only enters into basic financial instruments that result in the recognition of financial assets and liabilities such as trade and other debtors and creditors together with loans to related parties. Debt instruments, such as trade debtors and creditors, are initially measured at transaction price and subsequently measured at amortised cost.

Financial assets are assessed at the end of each reporting period for objective evidence of impairment. If objective evidence of impairment is found, an impairment loss is recognised in the income statement.

**Critical accounting judgements and estimation uncertainty**

The preparation of the financial statements in conformity with FRS 102 requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income, and expenses.

Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances.

The charity makes estimates and assumptions concerning the future. The resulting accounting estimates will, by definition, seldom equal the related actual results. The Trustees consider that the following critical accounting estimates and judgements have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

To determine the proportion of commissioned projects that have been completed, the trustees use costs incurred as a basis and judge that income to be recognised is equivalent to that. Any actual surplus or deficit is determined at project completion and transferred to or from unrestricted funds.

**Prior period adjustment**

Where an error or omission is identified in respect of comparative figures this is adjusted in the preceding period.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**3 Income from donations and legacies**

	Unrestricted funds £	Restricted funds £	Total funds £
Donations and gifts	197,415	-	197,415
Gift aid	3,827	-	3,827
<b>Total for 2023</b>	<b>201,242</b>	<b>-</b>	<b>201,242</b>
Donations and gifts	153,524	-	153,524
<b>Total for 2022</b>	<b>153,524</b>	<b>-</b>	<b>153,524</b>

**4 Income from charitable activities**

	Unrestricted funds £	Restricted funds £	Total funds £
Research projects and sales of reports	419,872	229,194	649,066
<b>Total for 2023</b>	<b>419,872</b>	<b>229,194</b>	<b>649,066</b>
Research projects and sales of reports	458,494	240,946	699,440
<b>Total for 2022</b>	<b>458,494</b>	<b>240,946</b>	<b>699,440</b>

**5 Investment income**

	Unrestricted funds £	Restricted funds £	Total funds £
Income from MCA permanent endowment fund	103,372	-	103,372
General bank interest receivable	2,629	-	2,629
<b>Total for 2023</b>	<b>106,001</b>	<b>-</b>	<b>106,001</b>
Income from MCA permanent endowment fund	99,916	-	99,916
General bank interest receivable	394	-	394
<b>Total for 2022</b>	<b>100,310</b>	<b>-</b>	<b>100,310</b>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**6 Expenditure on raising funds**

	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds £
Fundraising for donations	34,451	-	-	34,451
Support costs	-	-	22,522	22,522
<b>Total for 2023</b>	<b>34,451</b>	<b>-</b>	<b>22,522</b>	<b>56,973</b>
Fundraising for donations	53,427	-	-	53,427
Support costs	-	-	18,777	18,777
<b>Total for 2022</b>	<b>53,427</b>	<b>-</b>	<b>18,777</b>	<b>72,204</b>

**7 Expenditure on charitable activities**

	Note	2023 £	2022 £
Research project costs		600,727	620,225
Lectures and seminars		17,066	15,514
Research and organisational development costs		114,407	104,156
		732,200	739,895
Share of support costs	8	220,452	245,094
		952,652	984,989
<b>Analysis by fund</b>			
Unrestricted funds		608,455	613,213
Restricted funds		344,197	371,776
		952,652	984,989

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**8 Analysis of support costs**

	<b>Support costs</b>	<b>Governance costs</b>	<b>2023 £</b>
Database	1,190	-	1,190
Staff cost	66,056	-	66,056
Premises	72,208	-	72,208
General office costs	33,527	-	33,527
Depreciation and leasehold amortisation	13,204	-	13,204
Bank charges and exchange rate difference	1,589	-	1,589
Amortisation of trade marks	830	-	830
Auditor remuneration	-	15,900	15,900
Legal and professional	-	15,948	15,948
	<u>188,604</u>	<u>31,848</u>	<u>220,452</u>
		<b>Governance costs</b>	<b>2022 £</b>
Database	1,935	-	1,935
Staff cost	67,275	-	67,275
Premises	71,391	-	71,391
General office costs	40,102	-	40,102
Depreciation and leasehold amortisation	13,178	-	13,178
Bank charges and exchange rate difference	1,175	-	1,175
Amortisation of trade marks	830	-	830
Research & development costs	17,512	-	17,512
Auditor remuneration	-	25,200	25,200
Legal and professional	-	6,496	6,496
	<u>213,398</u>	<u>31,696</u>	<u>245,094</u>

**9 Trustees remuneration and expenses**

None of the trustees received remuneration for their services nor did they receive any reimbursement of expenses during the year (2022: None).

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**10 Staff costs**

The aggregate payroll costs were as follows:

	2023 £	2022 £
Wages and salaries	532,609	546,530
Social security costs	58,961	60,313
Pension costs	34,423	34,959
	<u>625,993</u>	<u>641,802</u>

The number of employees whose emoluments fell within the following bands was:

	2023 No	2022 No
£60,001 - £70,000	1	1
£80,001 - £90,000	-	1
£90,001 - £100,000	2	1
£110,001 - £120,000	-	1
£120,001 - £130,000	1	-
	<u>1</u>	<u>-</u>

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £232,705 (2022: £205,194).

	2023 £	2022 £
Average number of employees	<u>8</u>	<u>10</u>

**11 Auditors' remuneration**

	2023 £	2022 £
Audit of the charity's annual accounts	10,800	21,500
Other services - preparation of the charity's annual accounts	4,800	3,700
Other services - predecessor firm	300	-
	<u>15,900</u>	<u>25,200</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**12 Taxation**

The charity is a registered charity and is therefore exempt from taxation to the extent that such income or gain is applied to charitable purposes.

**13 Pension costs**

The charitable company operates a contributory pension scheme. It is a defined contribution scheme and contributions are charged in the statement of financial activities as they are paid. The charge for the year was £34,423 (2022: £34,959) and the liability outstanding at the year end was £1,709 (2022: £1,204).

**14 Intangible fixed assets**

	Trademark £	Total £
<b>Cost</b>		
At 1 January 2023	8,300	8,300
At 31 December 2023	8,300	8,300
<b>Amortisation</b>		
At 1 January 2023	4,150	4,150
Charge for the year	830	830
At 31 December 2023	4,980	4,980
<b>Net book value</b>		
At 31 December 2023	3,320	3,320
At 31 December 2022	4,150	4,150

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**15 Tangible fixed assets**

	Improvement to leasehold building £	Fixtures and fittings £	Computer equipment £	Total £
<b>Cost</b>				
At 1 January 2023	101,392	9,595	14,847	125,834
Additions	-	-	4,694	4,694
At 31 December 2023	<u>101,392</u>	<u>9,595</u>	<u>19,541</u>	<u>130,528</u>
<b>Depreciation</b>				
At 1 January 2023	19,198	3,407	14,607	37,212
Charge for the year	10,139	1,919	1,146	13,204
At 31 December 2023	<u>29,337</u>	<u>5,326</u>	<u>15,753</u>	<u>50,416</u>
<b>Net book value</b>				
At 31 December 2023	<u>72,055</u>	<u>4,269</u>	<u>3,788</u>	<u>80,112</u>
At 31 December 2022	<u>82,194</u>	<u>6,188</u>	<u>240</u>	<u>88,622</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**16 Fixed asset investments**

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£ (As restated)</b>
<b>Listed investments</b>		
<b>Cost or Valuation</b>		
At 1 January 2023	2,598,696	2,819,527
Additions	784,978	586,956
Disposals	(750,046)	(592,304)
Revaluation	<u>95,644</u>	<u>(215,482)</u>
At 31 December 2023	2,729,272	2,598,697
Cash held within investment portfolio	<u>4,974</u>	<u>66,833</u>
At 31 December 2023	<u><u>2,734,246</u></u>	<u><u>2,665,530</u></u>

**17 Debtors**

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
Prepayments and accrued income	23,032	53,999
Other debtors	<u>24,493</u>	<u>24,254</u>
	<u><u>47,525</u></u>	<u><u>78,253</u></u>

**18 Cash and cash equivalents**

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
Cash at bank	225,882	234,313
Cash held within investment portfolio	<u>4,974</u>	<u>66,833</u>
	<u><u>230,856</u></u>	<u><u>301,146</u></u>

**19 Creditors: amounts falling due within one year**

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
Trade creditors	1,069	8,622
Accruals	27,813	34,044
Other creditors	9,245	8,749
Other taxes and social security costs	<u>18,878</u>	<u>17,444</u>
	<u><u>57,005</u></u>	<u><u>68,859</u></u>

**The Institute For Jewish Policy Research  
Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

20 Funds	Balance at 1 January 2023 £	Income £	Expenditure £	Transfers £	Other recognised gains/(losses) £	Balance at 31 December 2023 £
<b>Unrestricted funds</b>						
Unrestricted funds	368,502	562,115	(318,570)	(254,285)	-	357,762
Designated funds	-	165,000	(324,336)	159,336	-	-
<b>Total unrestricted funds</b>	<u>368,502</u>	<u>727,115</u>	<u>(642,906)</u>	<u>(94,949)</u>	<u>-</u>	<u>357,762</u>
<b>Restricted funds</b>						
Project: Study of Antisemitic Attitudes	28,800	-	(57,925)	29,125	-	-
Project: Communications	2,972	60,000	(107,492)	44,520	-	-
Project: European Jewish Demography Unit	-	120,000	(113,080)	-	-	6,920
Project: European Commission Mapping	-	3,056	(17,568)	14,512	-	-
Project: Dutch Jews	-	40,000	(46,792)	6,792	-	-
Project: JAMI	-	3,500	-	-	-	3,500
Project: JLC/Survation	-	2,638	(1,340)	-	-	1,298
	<u>31,772</u>	<u>229,194</u>	<u>(344,197)</u>	<u>94,949</u>	<u>-</u>	<u>11,718</u>
<b>Endowment funds</b>						
MCA permanent endowment fund	2,601,735	-	(22,522)	-	85,387	2,664,600
<b>Total funds</b>	<u>3,002,009</u>	<u>956,309</u>	<u>(1,009,625)</u>	<u>-</u>	<u>85,387</u>	<u>3,034,080</u>

**The Institute For Jewish Policy Research  
Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

20 Funds (continued)	Balance at 1 January 2022 £	Income £	Expenditure £	Transfers £	Other recognised gains/(losses) £	Balance at 31 December 2022 £
<b>Unrestricted funds</b>						
Unrestricted funds	226,684	712,328	(666,640)	96,130	-	368,502
Designated funds	150,000	-	-	(150,000)	-	-
<b>Total unrestricted funds</b>	<u>376,684</u>	<u>712,328</u>	<u>(666,640)</u>	<u>(53,870)</u>	<u>-</u>	<u>368,502</u>
<b>Restricted funds</b>						
Commission: JW3 Monitoring and Evaluation Project	328	-	(1,453)	1,125	-	-
Project: Study of Antisemitic Attitudes	28,800	-	-	-	-	28,800
Project: Communications	79,604	60,000	(136,632)	-	-	2,972
Project: European Jewish Demography Unit	-	117,000	(168,198)	51,198	-	-
Commission: IDS II - Industrial dwellings society II	-	6,025	(2,802)	(3,223)	-	-
Commission: European Jewish Association	-	12,660	-	(12,660)	-	-
Commission: Census 2021	-	10,000	(21,758)	11,758	-	-
Project: European Commission Mapping	-	31,041	(31,041)	-	-	-
Commission: Manchester JRC & Mobilise	-	4,220	(9,892)	5,672	-	-
<b>Endowment funds</b>						
<b>Permanent</b>						
MCA permanent endowment fund	2,858,276	-	(18,777)	-	(237,764)	2,601,735
<b>Total funds</b>	<u>3,343,692</u>	<u>953,274</u>	<u>(1,057,193)</u>	<u>-</u>	<u>(237,764)</u>	<u>3,002,009</u>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**20 Funds (continued)**

**Endowment funds**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the organising and carrying out of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of these purposes. The income of the Fund may be spent by the Charity on a year to year basis as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000 converted to £3,466,337 at the date transferred) as increased annually by the United Kingdom Retail Prices Index ("RPI").

The original grant is a permanent endowment, the capital of which must be retained.

In order for the realised and unrealised gains to be spent it is necessary to satisfy the following conditions:

(1) The first condition is that the total amount of income and gains spent in any full financial year of the charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the 31st December 2020 to the beginning of the financial year.

(2) The second condition is that 30 days before the trustees resolve to spend the capital, the market value of the capital of the Fund must not be less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward any unspent part of the 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The Fund is invested on professional advice in order to obtain the maximum long-term return (net of any tax) which is regarded from time to time as a prudent target for the Fund.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**20 Funds (continued)**

**Restricted Funds**

The aim and use of each restricted fund is as follows:

(a) Project: European Jewish Demographic Unit - Established in January 2019, JPR's European Jewish Demography Unit is dedicated to generating data about Jewish populations in Europe to help support community development across the continent. Currently supported by the Rothschild Foundation Hanadiv Europe, it is led by JPR Senior Research Fellow, Dr Daniel Staetsky, and chaired by the world's leading expert in Jewish demography, Professor Sergio Della Pergola.

(b) Project: The European Jewish Research Archive: supported by Rothschild Foundation Hanadiv Europe, this is a project to build and maintain an online free to access archive of research publications on contemporary European Jewish communities. The archive includes reports, articles and other relevant materials that draw on, or discuss, social research on European Jewish communities since 1990.

(c) Commission: Jewish Blind and Disabled (JBD) - this study was designed to look at the socio-demographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of JBD's strategic review.

(d) Commission: JW3 Monitoring and Evaluation Project - this annual study is aimed at helping JW3 to monitor and evaluate the effectiveness of their work. It involves helping them to determine what they need to measure in view of their new strategic plan, advising them on how best to gather the required data, and then working with them to determine how best to use it for their purposes.

(e) Commission: Industrial Dwellings Society (IDS) - this project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of specific sites to support IDS's future planning.

(f) Project: Study of Antisemitic Attitudes - first run by JPR together with Ipsos MORI in 2017, this survey, monitoring anti-Jewish and anti-Israel attitudes among the British population, was due to be repeated in 2020. However, due to restrictions imposed by the Covid-19 pandemic, the study was postponed, and is now expected to take place in 2024/25.

(g) Project: Communications - With thanks to support from three key foundations, JPR recruited its first Director of Communications in October 2021. The priorities for the first year of the position are (i) to communicate JPR's research outputs to the media and key target audiences; (ii) to redesign the JPR website; and (iii) to build JPR's social media presence. Work began on all three of these areas in the last quarter of 2021 and the new website was launched in October 2022.

(h) Commission: IDS II - Industrial dwellings society II - This project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity to support IDS's future planning for a Jewish housing association working to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services.

(i) Commission: EVENS - a national survey designed to gather information about inequality among ethnic minorities. Our input is specifically designed to help them gather data on Jews and advice on how to analyse it, although we hope to learn from their work to help inform our own future analysis of Jewish populations.

(j) Commission: European Jewish Association - The European Jewish Association commissioned JPR to create an index to measure how different European countries are faring with regard to major Jewish concerns.

(k) Commission: Census 2021 - The JLC provided a small grant to support JPR's ongoing analysis of Jewish population data gathered by the Office of National Statistics in the 2021 Census of England and Wales, and general research advice to support the JLC's own work. The grant included funds for a joint event to share the findings of JPR's first report on the initial release of census data.

(l) Project: European Commission Mapping - As part of the EU strategy on combating antisemitism and fostering Jewish life, the European Commission (EC) has committed to creating a European research hub on contemporary antisemitism and Jewish life in the future.

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**20 Funds (continued)**

(m) Commission: Manchester-JRC & Mobilise - JPR and Mobilise collaborated on a mapping exercise commissioned by the Manchester Jewish Representative Council. The purpose of the exercise was to support strategic discussions about service provision in the Greater Manchester area. JPR's role was to identify existing services in their main areas of interest such as children, young people and families. The findings were presented in September to community and local government representatives in Manchester.

All the funds represent donations received and take into account the research costs incurred during the year.

**21 Analysis of net assets between funds**

	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds at 31 December 2023 £
Intangible fixed assets	3,320	-	-	3,320
Tangible fixed assets	80,112	-	-	80,112
Fixed asset investments	69,646	-	2,664,600	2,734,246
Current assets	261,689	11,718	-	273,407
Current liabilities	(57,005)	-	-	(57,005)
<b>Total net assets</b>	<b>357,762</b>	<b>11,718</b>	<b>2,664,600</b>	<b>3,034,080</b>
	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds at 31 December 2022 £
Intangible fixed assets	4,150	-	-	4,150
Tangible fixed assets	88,622	-	-	88,622
Fixed asset investments	63,795	-	2,601,735	2,665,530
Current assets	280,814	31,772	-	312,586
Current liabilities	(68,859)	-	-	(68,859)
<b>Total net assets</b>	<b>368,522</b>	<b>31,772</b>	<b>2,601,735</b>	<b>3,002,029</b>

**The Institute For Jewish Policy Research**  
**Notes to the Financial Statements for the Year Ended 31 December 2023 (continued)**

**22 Related party transactions**

During the year the charity made the following related party transactions:

**Entities over which the entity has control, joint control or significant influence**

At the balance sheet date the amount due from Entities over which the entity has control, joint control or significant influence was £16,667 (2022 - £16,667).

During the previous period €19,500 was transferred to the Stichting Institute for Jewish Policy Research, an entity registered in the Netherlands under the control of the charity, for working capital purposes. This amount remains outstanding at 31 December 2023 and is included within other debtors, is interest free and repayable on demand.

**23 Operating lease commitments**

At the year end the charity had annual commitments under non-cancellable operating leases as follows

	<b>2023</b>	<b>2022</b>
	<b>£</b>	<b>£</b>
Within one year	47,590	45,520
Between two and five years	163,057	155,239
In over five years	<u>99,645</u>	<u>145,165</u>
	<u><u>310,292</u></u>	<u><u>345,924</u></u>

**24 Prior period adjustment**

During the year it was identified that the analysis of movements within the fixed asset investments was not disclosed in accordance with the Statement of Recommended Practice. The listed investment analysis has been restated to reflect the correct disclosures, the opening and closing investment values remain unchanged. The resulting reanalysis has impacted figures within the Cash Flow Statement, which has therefore also been restated.

**25 Share capital and controlling parties**

The company is limited by guarantee and has no share capital. The liability of its members is limited to £1 per member.

**THE INSTITUTE FOR JEWISH POLICY RESEARCH**

England & Wales - Charity number 252626

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# Accounts

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Charity registration number 252626

Company registration number 894309 (England and Wales)

**INSTITUTE FOR JEWISH POLICY RESEARCH  
ANNUAL REPORT AND FINANCIAL STATEMENTS  
FOR THE YEAR ENDED 31 DECEMBER 2022**

# INSTITUTE FOR JEWISH POLICY RESEARCH

## LEGAL AND ADMINISTRATIVE INFORMATION

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<b>Charity number</b>	252626
<b>Company number</b>	894309
<b>Governing Document</b>	Articles of Association
<b>President</b>	Lord Leigh of Hurley
<b>Honorary President</b>	Lord Rothschild OM
<b>Honorary Vice Presidents</b>	Lord Haskel Harold Paisner Brian Smouha
<b>Chairman</b>	Stephen Moss CBE
<b>Treasurer</b>	Michael Karp OBE
<b>Executive Director</b>	Dr. Jonathan Boyd
<b>Director of Operations and Secretary</b>	Richard Goldstein
<b>Senior Research Fellows</b>	Dr. David Graham Dr. Daniel Staetsky Dr. Carli Lessof
<b>Directors and Board of Management</b>	
Stephen Moss CBE	(appointed on 07/09/2010)
Michael Karp OBE	(appointed on 21/01/2015)
Elizabeth Crossick	(appointed on 29/06/2015)
Lord Leigh of Hurley	(appointed on 29/06/2015)
Miles Webber	(appointed on 17/04/2020)
William Benjamin	(appointed on 06/07/2020)
Hilda Worth	(appointed on 06/07/2020 and terminated on 20/02/2023)
Professor Jonathan Haskel CBE	(appointed on 28/10/2019)
Mark Berman	(appointed on 10/07/2023)
Denise Joseph	(appointed on 10/07/2023)
Felicia Epstein	(appointed on 24/04/2023)
Davod Ereira	(appointed on 24/04/2023)
Professor Sergio Della Pergola	(appointed on 28/01/2019 and retired on 04/02/2022)
<b>Registered office</b>	6 Greenland Place London England NW1 0AP

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# INSTITUTE FOR JEWISH POLICY RESEARCH

## LEGAL AND ADMINISTRATIVE INFORMATION

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**Auditor**

Sobell Rhodes Audit Limited  
The Kinetic Centre  
Theobald Street  
Elstree  
Borehamwood  
Hertfordshire  
United Kingdom  
WD6 4PJ

**Bankers**

Barclays Bank plc  
1 Churchill Place  
London  
E14 5HP

**Investment Managers**

LGT Wealth Management UK LLP  
14 Cornhill  
London  
EC3V 3NR

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# INSTITUTE FOR JEWISH POLICY RESEARCH

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# INSTITUTE FOR JEWISH POLICY RESEARCH

## CHAIRMAN'S STATEMENT

### *FOR THE YEAR ENDED 31 DECEMBER 2022*

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The Institute for Jewish Policy Research (JPR) is an independent research organisation, consultancy and think tank supporting Jewish communities in the UK and across Europe. It has stood at the forefront of Jewish community research for several decades and provides services and data-driven policy advice to those best placed to positively influence Jewish life.

JPR's mission is to provide independent research that informs policy decisions for both Jewish community leaders and government policymakers. It collects and analyses data on various aspects of Jewish life, such as demography, education, culture, identity and welfare, and then disseminates its findings through its website, publications and media outlets, as well as offering research services and policy advice to organisations that request them. JPR works with all segments of the Jewish community, from the most Orthodox to the most secular, to help them understand and address their needs and challenges. JPR aims to support Jewish organisations in achieving their objectives, using evidence-based research to guide them, and strives to foster diversity and inclusion within the Jewish community by recognising and respecting different forms of Jewish expression and practice.

JPR achieved several milestones in 2022. We expanded our research panel, which enables us to conduct surveys of the UK Jewish population with high quality and reliability. We examined the effects of the pandemic on the community and provided useful data on Jews in Ukraine and Russia to assist rescue and relief efforts and to estimate the level of need. We responded quickly to the first release of the 2021 Census religion data in England and Wales, and are working diligently to ensure that we can extract the most value from these data for the community. We enhanced our reputation in Europe, producing new data and analysis about the identities of European Jews, completing a complex sociodemographic research project about the Jews of Belgium, and strengthening our relationship with the European Commission by conducting a research study linked directly to its ten-year strategy to combat antisemitism and support Jewish life on the continent. We also made significant progress on our communications work, integrating a new Director of Communications, building and launching a new and improved website, and starting to establish new systems of communication via social media and e-newsletters to help share our research findings and insights more widely and effectively. We brought a new researcher onto the team to help manage our panel work and we established a new intern programme to help cultivate young researchers for the Jewish community while also adding to our capacity and outputs.

We also continued to serve Jewish communal organisations by conducting research for various clients, and presenting our results to Jewish leaders from different organisations across the UK such as the Jewish Leadership Council, Jewish Care and the Office of the Chief Rabbi, and from major international bodies including the Jewish Agency for Israel, JCC Global, and the Jewish People Policy Institute in Jerusalem. Throughout the year, we presented our work directly to an estimated 1,250 community leaders and policymakers, at over 30 events in ten cities around the world.

We have a number of new publications in the pipeline for publication in 2023, the work for which began in 2022. These include studies of how the 2021 War in Gaza impacted Jews in the UK; patterns of migration among European Jews; a new international study of intermarriage; and a major project for the European Commission mapping the research field of antisemitism and contemporary Jewish life across Europe to support its new ten-year strategy to combat antisemitism and foster Jewish life on the continent.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## CHAIRMAN'S STATEMENT (CONTINUED)

### *FOR THE YEAR ENDED 31 DECEMBER 2022*

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JPR faced many obstacles in 2022, as we began to return to normal working life after the disruptions of the COVID-19 pandemic. Most notably, we had to function without a fundraiser for much of the year, which affected our ability to seek out and secure new sources of funding. However, we are very grateful to our loyal donors and foundations who continued to support the Institute, sometimes with increased contributions. Pears Foundation has been a steadfast partner of JPR for many years, and continued to provide unrestricted funding in 2022 to strengthen the Institute's capacity and enhance our communications work. Rothschild Foundation Hanadiv Europe similarly continued to provide considerable support in various areas, and helped us to expand and enhance our programme thanks particularly to a major new four-year grant. We also very much appreciated the continued support we received in 2022 from the Maurice Wohl Charitable Foundation, as well as from the David and Ruth Lewis Family Charitable Trust, the Haskel Family Foundation, the Charles Wolfson Charitable Trust, the Kirsh Foundation Trust and many others. Our gratitude also goes to the Morris Leigh Foundation, which has been a loyal supporter of JPR for many years and remains a vital source of support, and indeed to all of our supporters whose ongoing donations are crucial for our sustained success.

2023 promises to be a busy and productive year for JPR. In addition to the projects mentioned above, we will continue to develop our UK Jewish research panel (a unique initiative in the Jewish diaspora), and commence work on a major new survey on Jewish people's views and experiences of antisemitism, and an innovative study of the haredi community. We will also continue to analyse the 2021 Census data, expand our European Jewish demography programme beginning new country reports on Spain and the Netherlands, and further enrich our archive of research on contemporary European Jewish life. The most exciting news is that in mid-2023, working in partnership with Ipsos, we secured a major new contract from the European Commission for its study of attitudes towards Jews in all 27 EU Member States. This is the largest and most high-profile project JPR has won and will be a major focus of the Institute's work for eighteen months from September 2023.

I would like to express my deep gratitude to two groups of people who have been instrumental in our work. First, to our wonderful trustees, who share our vision and give us the encouragement and resources to explore new possibilities and topics. A heartfelt thank you in particular to Professor Sergio DellaPergola, who stepped down from the board in 2022 - his expertise and passion will be greatly missed around the Board table, but I am very happy that he remains the Chair of our European Jewish Demography Unit, and an active contributor to our research work. In the coming year, JPR aims to recruit several new trustees to the Board, both to help enhance its diversity and knowledge, and to prepare for the departure of three current trustees who are due to stand down in 2024 when they will have reached the end of their third terms in office.

Secondly, I wish to convey my deep gratitude to the wonderful team at JPR for its dedication and excellence, led by our Executive Director, Dr Jonathan Boyd. Our research team in 2022 included our Senior Research Fellows, Dr Daniel Staetsky, Dr Carli Lessof and Dr David Graham, and our Research Fellows, Brigitta Horup, who left us in September, and Isabel Sawkins, who joined in May. Dr Keith Kahn-Harris continued to manage and direct our European Jewish Research Archive, and will be working more closely with us in the coming years, particularly to support our new project with the European Commission. Much gratitude too to our operations team of Richard Goldstein and Omri Gal, as well as to three members of staff who worked for us in 2022, but have now left JPR: Judith Russell, Carol Glenn and Rebecca Frankel. I particularly want to thank Judith, who served in various capacities at JPR with passion and diligence for over 25 years – the institute, and indeed the communities we support, all owe her a great deal of gratitude, and we wish her continued health, happiness and fulfilment in her retirement.

Finally, in early 2023, we were deeply saddened to learn of the passing of Brian Smouha, who served as JPR's Treasurer and Vice-President for many years. Brian was a loyal and dedicated supporter of JPR and his invaluable contribution to the Institute's work will be greatly missed.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## CHAIRMAN'S STATEMENT (CONTINUED)

*FOR THE YEAR ENDED 31 DECEMBER 2022*

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Stephen Moss CBE

**Chairman**

Date: 27 September 2023

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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The trustees present their annual report and audited financial statements for the year ended 31 December 2022. The Institute for Jewish Policy Research is a charitable company limited by guarantee under registration number 894309 and is registered by the Charity Commission under registration number 252626. Please refer to pages 1 and 2 for further legal and professional information.

The financial statements have been prepared in accordance with the accounting policies set out in note 1 to the financial statements and comply with the charity's [governing document], the Companies Act 2006 and "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 2019).

#### **OBJECTIVES AND ACTIVITIES**

The objectives of the charity as set out in the company's Articles of Association are to promote, assist in, organise, and carry out the study of, and research into, and the increase of knowledge concerning the social, religious, cultural, economic and communal life and the welfare and status of Jews and Jewish communities throughout the world and of international and national questions, trends, views and conditions in regard to their effects on the life, welfare and status of the Jewish people and the relations between Jews and non-Jews.

In essence, JPR is a charity that provides independent research to help Jewish community leaders and policymakers make informed and evidence-based decisions. The Institute works with Jewish organisations of all backgrounds and orientations, from the most Orthodox to the most secular, to help them understand their populations and meet their needs. JPR uses data and analysis to help Jewish charities and foundations plan effectively for the future, sharing research insights and offering research services and policy advice to support their goals. In this way, JPR seeks to support diverse expressions of Jewishness and to reach out to all Jews regardless of their beliefs or practices.

JPR conducts research on various topics related to Jewish life. It examines demographic trends such as population size, mortality and fertility rates, age structure and migration patterns. It also explores specific issues such as health and wellbeing, socioeconomics, education, Jewish identity and practice, philanthropy, campus life, antisemitism and attitudes to Israel, providing insights into some of the most urgent challenges facing Jews today. We share our data widely with community leaders and policymakers to support their understanding of contemporary Jewish issues, and to guide their thinking about how to maintain and enhance Jewish life. Our data support charities, foundations and organisations working with Jews and on issues of concern to them, helping schools, elderly care homes, social welfare charities, Jewish community representative organisations, governmental bodies and NGOs to better understand Jewish communities and plan for their future.

JPR disseminates its research findings in various venues, such as symposia and seminars tailored to specific groups, strategic planning days with key communal leaders, training days for staff teams of specific organisations, academic conferences and public events. JPR communicates its work on its website and through online and print media, aiming to make it available at all times to target audiences and beyond.

#### **PUBLIC BENEFIT**

The Institute for Jewish Policy Research is an independent research institute that conducts and disseminates research on contemporary Jewish communities. JPR's research is policy-oriented; it collects and analyses data and makes research available to policymakers, service providers and the general public through online and print publishing, presentations and events.

The Directors, having carefully considered the Charity Commission's guidance on public benefit, have concluded that:

JPR's aims and activities give clearly identifiable benefits to the public and continue to be charitable. The work particularly benefits the Jewish voluntary sector in the United Kingdom and elsewhere in Europe. Through its pioneering social research, JPR also makes contributions to the wider voluntary sector, by sharing its knowledge and scholarship, thereby benefiting wider society. The benefits are not unreasonably restricted in any way.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### **JPR'S WORK IN 2022**

JPR had a successful year in 2022, undertaking research for organisations ranging from the European Commission to the Manchester Jewish Representative Council, and sharing and discussing our findings with Jewish leaders from a range of organisations in the UK including the Jewish Leadership Council, Jewish Care and the Office of the Chief Rabbi, and from global bodies such as the Jewish Agency for Israel, JCC Global and the Jewish People Policy Institute in Jerusalem.

The Institute's work touched on several key global issues such as the COVID-19 pandemic and the war in Ukraine, as well as major internal Jewish community issues including antisemitism, the impact of dynamics in Israel on Jews in the UK and the changing nature of Jewish identity. JPR continued to develop and build its internal research infrastructure to help provide data and insights to Jewish community leaders and policymakers more efficiently, and we constructed and launched a new organisational website to help share our findings more widely and effectively.

#### **1. RESEARCH REPORTS PUBLISHED DURING 2022**

JPR produces freely downloadable research reports to disseminate the findings widely and enhance their impact in the field. In 2022, JPR completed six reports, with several others in progress. The Institute continued its work analysing the impact of COVID-19 on the British Jewish community as well as starting work on analysing the first data on Jews from the 2021 Census. In addition, JPR's international work continued to support community policy development overseas.

##### **1.1. UK REPORTS**

###### ***Six takeaways about Jewish life under lockdown (September 2022)***

Whilst research on the pandemic declined as a priority throughout 2022, JPR continued to keep an eye on developments, particularly with respect to how it affected Jewish life. This report charted how feelings of attachment to the community were affected by the changes wrought by the pandemic. It included measures of levels of engagement in different aspects of Jewish life, such as prayer services, educational activities and social events, and how confident different subgroups within the Jewish population have felt about the gradual return to a new type of Jewish normal. The data used in the report come from the first two national surveys JPR ran in 2020 and 2021 using our new UK Jewish Research Panel.

###### ***Jews in Britain in 2021: First results from the Census of England and Wales (November 2022)***

One of the key developments in 2022 was the release of the first data on Jews from the 2021 Census. There is much more to come throughout 2023 and 2024 – we expect to commission data from the Office for National Statistics (ONS) over time – but JPR was keen to analyse the first data as soon as possible after their release. Census data are of particular value to community leaders and planners because they provide a remarkably detailed and accurate view of the country's Jewish population and allow us both to monitor change over time and predict future trends in several areas, including projected demand for school places and elderly care.

This first report on the census was published on 29 November, the day on which the first data on religion were released by ONS, and it contains the initial results about the geography of the British Jewish population. On that day, JPR held a joint webinar with the Jewish Leadership Council (JLC), watched by 150 people, in which we analysed and discussed the findings.

##### **1.2 INTERNATIONAL REPORTS**

###### ***The Jewish identities of European Jews: What, why and how? (February 2022)***

Throughout 2021, JPR analysed the responses of over 16,000 European Jews in 12 European countries who participated in the survey that we conducted for the European Union Agency for Fundamental Rights in 2018. Utilising the data from that survey, this report took an in-depth look at how Jews across Europe express and understand their Jewish identities, and was particularly aimed at those working in the fields of Jewish community development and education across the continent. As the report itself was very detailed, JPR also published three short papers to highlight key aspects of the findings to make them more accessible: *What is Judaism: are Europe's Jews a religious or an ancestry group?* (March 2022); *Why be Jewish: The essential Jewish values of Europe's Jews* (April 2022); and *How do Jews live their Jewishness? Religious lifestyles and denominations of European Jews* (August 2022). A fourth paper in the series, focused on attachments to Israel, the EU and the countries in which European Jews live, was published in 2023.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

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### ***How many Jews may be caught up in the conflict in Ukraine? (March 2022)***

As the war began in Ukraine, some wildly different estimates of how many Jews might be caught up in it, whether on the Ukrainian or Russian side of the border, were being quoted, both in the media and among community organisations eager to offer support. In response, and drawing on the latest demographic research by researchers at JPR and the Hebrew University, JPR put this paper together to try to bring some clarity to the issue.

### ***Haredi Jews around the world: Population trends and estimates (May 2022)***

JPR continues to monitor carefully how the rapidly growing haredi population in the UK and around the world, is affecting the overall Jewish population balance nationally and globally. It is a major issue that will almost certainly have a highly significant impact on how Jews live their lives, how they are seen by others, and indeed, what Judaism is. Capitalising on new resources and advances made in the methods of estimation, this report was the first time that the global haredi population size has been estimated and calculated. It revealed that about 2,100,000 haredi Jews live worldwide, out of a total global Jewish population of 15 million. The report projected that the haredi population could double in size by the year 2040, rising to over a fifth of the total by that time.

### ***Jews in Belgium: a demographic and social portrait of two Jewish populations (November 2022)***

Part of the work of JPR's European Jewish Demography Unit involves the production of detailed reports on the sociodemographic characteristics of Jews in particular countries. Following the first report in this series – about Austria – JPR published a new country report in 2022 on Belgium. Jewish population size estimates for Belgium have not been assessed systematically for many years, and researchers have therefore not had the data to enable them to clearly say what the population looks like in terms of its age, education, religiosity, and patterns of migration. This lack of up-to-date demographic information has meant that community leaders have no baseline data against which to assess their impact, and, more generally, there have been persistent difficulties in assessing the representativeness of surveys of the Belgian Jewish population. This report was designed to fill this data vacuum with a thorough assessment of the size and structure of this Jewish population, following an extensive demographic data collection project spanning eighteen months. JPR launched the report at public events in the two main Belgian Jewish population centres, Brussels and Antwerp, where the findings were presented to Belgian Jewish community leaders.

## **1.3. COMMISSIONED STUDIES FOR CLIENTS**

Undertaking commissioned research for Jewish charities and foundations and governmental and non-governmental bodies is an important part of JPR's work. During 2022, our UK clients included the Industrial Dwellings Society and the Jewish Representative Council of Greater Manchester, and our international clients included the European Commission and the European Jewish Association.

### **European Commission (EC)**

JPR carried out a study for the European Commission (EC) in 2022-23 mapping the social research infrastructure on antisemitism and contemporary Jewish life in Europe. The project was directly related to the EC's commitment to establish a research hub for the study of contemporary Jewish life and antisemitism, which was part of its ten-year strategy published in late 2021. The study was launched at an event hosted by the European Commission in Brussels in March 2023.

### **European Jewish Association**

JPR completed a commission for the European Jewish Association (EJA) to take steps towards the creation of an index to measure how different European countries are doing with regard to major Jewish concerns. The project involved a pilot study that combined polling data and policy information to determine whether it is possible to create a single quality-of-life metric for Jews in 12 European countries with sizeable Jewish communities. The initial findings were shared at a seminar in Vienna with key Jewish community leaders from across Europe.

Following JPR's 2021 study for them about a site in Mill Hill, a follow-up project mapping the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in Borehamwood was fulfilled in 2022.

### **Yesod Europe**

JPR undertook a commissioned project for Yesod Europe, which involved providing training for European Jewish community educators and professionals on how to use data to monitor and evaluate their work.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### *FOR THE YEAR ENDED 31 DECEMBER 2022*

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#### **1.4. RESEARCH REPORTS IN DEVELOPMENT DURING 2022**

The process of preparing each report takes time, and work began in 2022 on a number of other publications that we expect to publish in 2023. These reports included investigating what British Jews thought about the May 2021 conflict in Gaza; Jewish migration patterns from 15 European countries; a commissioned project from the European Commission (EC) mapping the field of research of contemporary antisemitism and Jewish life in terms of topics, geography, individuals and institutions involved; and a new mini-report based on JPR's groundbreaking report 'The Jewish identities of European Jews', which explored European Jews' levels of attachment to the countries in which they live, to Israel, and to the European Union.

#### **Manchester Jewish Representative Council**

In collaboration with the research agency, Mobilise, JPR completed work on a project commissioned by the Manchester Jewish Representative Council to carry out a mapping exercise to support strategic discussions about service provision in the Greater Manchester area. The Charity's role was to identify existing services in their main areas of interest, such as children, young people and families; Mobilise carried out stakeholder interviews and focus groups. The findings were presented by JPR and Mobilise to community and local government representatives in Manchester.

#### **Industrial Dwellings Society**

In 2022, JPR completed its work for the Industrial Dwellings Society (IDS) – a Jewish housing association working to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

#### 2. PRESENTATIONS, DOWNLOADS AND ACTIVE USE OF JPR RESEARCH DATA AND FINDINGS

In 2022, JPR presented its work directly to an estimated 1,250 people, at over 30 events in ten cities around the world. Among the events and presentations were the following:

Date	Client	Detail
January 22	Office of the Chief Rabbi	Presentation of our climate change report and discussion of its implications for the community
	Eco Synagogue/ Board of Deputies/ World Jewish Relief	Findings of climate change report presented at Tu B'shevat event
February 22	The Israel and Golda Koschitzky Centre for Jewish Studies at York University, Toronto	Online panel discussion about antisemitism and anti-Israelism
March 22	Association for the Social Scientific Study of Jewry (ASSJ)	JPR webinar for over 50 academics and researchers on 'Jewish identities today: concepts, measurements and realities', drawing on our report on Jewish identity in Europe.
	Israel Embassy	Presentation/discussion with the Israeli Ambassador and her team exploring some of the key data on Jews in the UK
April 22	Herzl Institute	Presentation about new research on how to measure and understand the parts of the Jewish population least connected to the organised Jewish community, including communities in Africa
May 22	Akademie für Politische Bildung	Presentation about global trends in antisemitism
	The Jewish People Policy Institute in Jerusalem	JPR webinar for over 100 academics, community leaders and researchers on 'Haredi population growth: considering the implications', based on our report about the haredi population worldwide
	Westbury Group	Presentation in Berlin on the key issues facing European Jewry to leaders of key foundations investing in aspects of European Jewish life
June 22	JCC Global	Presentation of the key data on European Jewish life, for a training programme for Jewish community leaders from the former Yugoslavia
	Consistoire de France	Presentation on antisemitism in France
	Jewish Agency for Israel (JAFI)	Presentation to JAFI educators about our report on European Jewish identity and particularly how antisemitism plays a significant role in how Jews understand their Jewishness.
	London Jewish Museum	Presentation to senior staff and lay leaders on the future of Jewish life in the UK
	Edgware United Synagogue (and wider United Synagogue)	Presentation of some of the key data on Jewish life in the UK, and how 2021 Census data are expected to sharpen our understanding. Part of the synagogue's adult education programme

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

July 22	Gesher Institute for Leadership	Overview of demographic and social data on Jews in the UK to senior staff from the Israeli Ministry of Education, departments of education at various Israeli municipalities, the IDF and Israel's Channel 13 News
	JLC	Presentation/discussion at the 10th annual Jewish Community Trustees' Conference on key issues the UK Jewish community leaders need to know about the future of Jewish life in the UK
September 22	Natan Fund	Presentation to trustees about antisemitism in Europe
	European Association of Israel Studies	Presentation to 10th Annual Conference on Israeli Jewish demography
November 22	Belgian Jewish community leaders	Two launch events of JPR's report on the demography of the Belgian Jewish community to community and political leaders in Brussels and Antwerp
	Jewish Care	Presentation to the trustees on social and demographic data on the UK Jewish community, and what the data tell us about elderly care needs going forward
	Woolf Institute	Academic lecture: "Limitations of tolerance? Circumcision of male infants and kosher slaughter in Europe today"
	European Commission Civil Society Forum	Presentation in Brussels on our work to highlight research gaps in combating antisemitism and fostering Jewish life
	Rabbinic Training Academy in the UK	Presentation/discussion on: "The key data every rabbi needs to know about the future of Jewish life in the UK"
	Joint event with the Jewish Leadership Council	Webinar to present the initial results of the 2021 UK Census religion question
December 22	JLC Council	Webinar and discussion about the initial results from the 2021 UK Census
	Adam Science Group	Session on key data about the Jewish community in the UK to young leaders
	Jewish Care	Presentation to Holocaust survivors about what some of the recent data tell us about the impact of the Holocaust on contemporary Jewish life, and the future of Jewish life in the UK and Europe
	Association of Jewish Studies	Presentation in Boston at the annual conference of Jewish Studies academics, looking at haredi population trends worldwide
	Limmud	Presentation of data on the impact of the COVID-19 pandemic on the UK Jewish community

In addition to the above-mentioned reports and papers, JPR's Executive Director, Dr Jonathan Boyd wrote a regular column in the *Jewish Chronicle* in which he used data generated by JPR and other agencies to share his reflections about contemporary Jewish life on a wide range of topical issues. This helped raise awareness about JPR and its work and to promote the use of data in understanding community trends and issues.

In 2022, JPR reports were downloaded 61,750 times and JPR's e-newsletters reached close to 3,700 people every edition, with an opening rate of over 30%.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

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### 3. OTHER INITIATIVES AND DEVELOPMENTS

#### **Communications**

JPR launched its new website in early October ([www.jpr.org.uk](http://www.jpr.org.uk)). Innovations include a mobile-friendly and responsive design, a new insights section that includes short analytical and opinion pieces written by members of the JPR team discussing specific aspects of the Institute's findings, the use of video on the website – including live broadcasts of events – and tags to allow users to search reports and insights by topic, country, type of publication and authors.

JPR continues to develop its digital marketing profile, specifically increasing its profile on Facebook, Twitter, LinkedIn, Instagram and YouTube, and as the Charity learns more about its users, JPR is improving its ability to deliver our reports and insights to a wider and more diverse audience. A Facebook and Instagram campaign to launch the website reached over 70,000 people.

Going forward, JPR is investing in finding new ways to engage with key audiences. A new partnership was established with JW3 and Earshot Strategies in 2022 to create a six-part series of podcasts in which the results of the 2022 National Jewish Identity Survey and their policy implications will be discussed. JPR is working to launch its first series in autumn 2023, to align with the publication of the key findings from the survey.

#### **The JPR Research Panel and surveys**

At its core, JPR's Research Panel consists of a large database of Jews from across the UK who have agreed to participate in our surveys. However, beyond this simple description, it is a complex technological instrument, that allows JPR to run its own online surveys, link the records of individual respondents across surveys to better track change over time, undertake longitudinal analysis, and field questions for client organisations. It is a unique resource in the Jewish world – no other Diaspora community has such a facility – and whilst it remains in development and more work needs to be done to enhance and sustain it, the panel is improving all the time. JPR made considerable progress in developing the panel in 2022, working with external data managers and processors to help set up the systems that will enable it to run more efficiently going forward, and produce the data from it quickly and efficiently so that it can be analysed with optimal speed.

JPR conducted the fieldwork for our National Jewish Identity Survey in November and December 2022. It was the third survey we have undertaken using our Research Panel and it was designed to provide in-depth information about Jewish identity issues and to compare Jewish life now with life as it was a decade ago, in order to help inform planning work in the areas of community development and education. Work also began on our fourth panel survey, which went into the field in April 2023, to run a version of the multinational study of Jewish people's perceptions and experiences of antisemitism being conducted by the European Union Agency for Fundamental Rights (FRA) at the same time. That survey is designed to generate data to determine how the situation has changed in the UK since data were previously gathered in 2012 and 2018, and to compare the current situation in the UK with that of other Jewish communities across Europe. Work similarly began on a further panel survey planned for late 2023 which will look at the attitudes of haredi Jews in the UK on a range of issues, both to help haredi community leaders better understand some of the dynamics within their community and to encourage haredi Jews to join the JPR panel.

#### **European Jewish Research Archive (EJRA)**

Work progressed on JPR's European Jewish Research Archive (EJRA), a publicly available online archive for research publications on contemporary European communities. The archive includes social research reports conducted about European Jewish communities since 1990. In 2022, the archive had 23,722 unique visitors to the site (a 19% increase on 2021), who spent 26,684 unique sessions on the site (a 19% increase on 2021) and produced 37,214 page views (a 16% increase on 2021). The archive now contains over 4,669 items in 27 languages covering 56 countries.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED) FOR THE YEAR ENDED 31 DECEMBER 2022

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### PERFORMANCE

In general, JPR had a successful 2022. It made significant progress with the research panel, enhancing its capacity to run surveys of the UK Jewish population that should stand it in good stead for the future. The Institute conducted further work on the pandemic to assess its impact on the community and generated valuable data on Jews in Ukraine and Russia to try to support rescue and relief work and to help inform understanding of the scale of need. The Charity reacted swiftly to the first release of the 2021 Census data in England and Wales, and is now working hard to ensure that it develops the means of maximising the value of these data to the community. JPR enhanced its reputation in Europe, producing new data and analysis about the identities of European Jews, completing a complicated sociodemographic research exercise about the Jews of Belgium and building a good working relationship with community leaders there. It strengthened its relationship with the European Commission through conducting a research study tied directly to its ten-year strategy to combat antisemitism and support Jewish life on the continent. Furthermore, JPR made significant progress on communications, integrating a new Director of Communications, building and launching a new and improved website, and starting to establish new systems of communication via social media and e-newsletters. It brought a new researcher onto the team to help manage its panel work and established a new intern programme to help cultivate young researchers for the Jewish community whilst also adding to our capacity and outputs.

In general, JPR's services are more in demand than ever. As it has enhanced its communications work, it is finding itself being approached by increasing numbers of organisations requesting research support, and the greatest challenge is that it simply does not have sufficient capacity to do everything that is being asked. As it works to enhance and strengthen its team, JPR needs to address this challenge: while its work is clearly needed, it has to find new ways to continue to build the research infrastructure required to meet demand.

### FINANCIAL REVIEW FOR THE YEAR

The Chairman's Statement on pages 1-2 provides a summary of activities during the year. The results for the year are shown in the Statement of Financial Activities on page 21.

JPR's income continues to come from four main sources: the MCA Endowment; grants from foundations; commissioned work and donations.

The value of the investments was £2,665,530 at the end of 2022. This marks a decrease from the start of the year of 9% (£2,932,100). The income received from the fund's investment was £109,945, as budgeted in advance by the Trustees.

The fund's investment manager noted that while income targets had been met in 2022, in terms of the value of the fund, this was a challenging year for markets with the impact of inflation and geopolitical events causing most major asset classes to fall. Central banks increased interest rates at the most aggressive speeds in recent times, leading to multiple equity sectors to re-rate and bond values to fall as their yields increased. While this is a challenging backdrop for investments, the portfolio offered good downside protection and significantly outperformed the peer group over the year, despite negative overall returns. One benefit from the rise in interest rates has been income generation which has become less of a challenge than it has been in recent years. The yield on UK investment grade has risen to 5% and the natural yield of the portfolio now sits at c.4%.

In terms of the positioning of the portfolio, the investment managers started de-risking the portfolio over the year by reducing equities and increasing cash holdings. This was aimed at not only helping provide downside protection but also having the cash available to reinvest when they felt there were attractive opportunities. Most of the cash balance is now held in a liquidity fund, where the yield has been rising over the year and finished at c.3% - still providing an income for the charity. Performance at the end of the year was ahead of the peer group over all periods, providing downside protection in the falling market but also participating in the rally towards the end of the year. The progress in the shorter-term figures has also fed through to the 3-5 years, showing the portfolio ahead of the peer group over both of these periods. Overall, the investment managers believe the portfolio has performed well, being ahead of the peer group whilst delivering the income requirement agreed upon.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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Looking to 2023, investment managers expect an economic downturn and recession in the US which will carry through to Europe. It is probable that this would lead to a fall in inflation data and quicker-than-expected rate reductions from Q4 2023 which hopefully will see markets improve. The market is currently at odds with this view, suggesting that whilst a slowdown of growth is priced in, a recession is not. Since the end of the year, the main focus of portfolio trades has been to increase the bond weighting in UK investment grade, with this being funded via the sale of a gilt and lowering the cash held. The current yield of this fund is c.5% so should help meet the new 2023 income target of £110,000, whilst also being attractive for potential growth if interest rates start to fall.

The fund manager's quality, sustainable growth approach maintains focus on companies underpinned by long-term structural growth themes. They seek to identify businesses that will benefit from shifting trends while avoiding those where change will be detrimental. Experience has taught that companies that have strong balance sheets and can create value by generating cash flow exceeding their operational requirements tend to generate stronger and more sustainable returns. They are also usually better positioned to reinvest in their businesses and distribute earnings to shareholders. The fund manager believes these types of companies merit long-term positions in portfolios regardless of shorter-term sentiment.

In 2022, JPR secured a total of £611,518 in unrestricted donations, up from £482,365 in 2021. This included a new major investment of £600,000 from the Rothchild Foundation to be distributed over four years, £75,000 from both the Pears Foundation and the Maurice Wohl Charitable Foundation, as well as an increased donation of £40,000 from the David and Ruth Lewis Family Charitable Trust (which was increased further in 2023). We were also very grateful for the sizable and repeated donations from the Charles Wolfson Charitable Trust, and the Bloom, Haskel Family and Kirsch Foundations. Income from commissioned work brought in £240,946 in 2022. This was a slight reduction from 2021 of £291,631, but as explained above, was due to JPR's lack of a dedicated Head of Fundraising and reluctance among some charities to commission new studies during a period of economic instability.

With the new investment from the Rothschild Foundation, the continued support of all of our existing major donors and the income that will come from the new European Commission tender we won in mid-2023, the financial outlook for JPR in 2023 looks encouraging. JPR managed successfully to navigate the loss of its Head of Fundraising for much of 2022, and the plans now afoot to secure a replacement in 2023 points to a bright future for JPR.

#### **RESERVES POLICY**

JPR's reserves policy is to seek to hold three to six months of overheads. This would amount to between £264,298 and £528,596. As of 31 December 2022, there was a surplus of unrestricted funds of £368,003, which is in line with the target range as set out above.

JPR has adopted this policy to cover the risk of any unforeseen emergencies, such as unexpected IT costs or day-to-day operational costs, such as employing temporary staff to cover sickness absence during major projects. The reserves policy will also cover any fluctuations in income, such as late payments for commissioned work or large grants being delayed or not renewed. The reserves will ensure any expenditure is covered on preparatory work on projects, as well as any necessary organisational development costs not covered by income.

The policy of holding three to six months' reserves will enable JPR to develop new sources of finance or cut back on expenditure should an emergency arise. In the meantime, such a prudent policy provides a stable base for JPR's research and the dissemination of the results to assist Jewish communities in the UK and continental Europe.

#### **PERMANENT ENDOWMENT INVESTED ON TOTAL RETURN BASIS**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the preparation and production of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe, together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of the said purposes. The income of the Fund may be spent by the Charity on a year-to-year basis, as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000, converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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In order for capital to be spent, it is necessary to satisfy two conditions:

1. The total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.
2. Thirty days before the trustees resolve to spend the capital, the market value of the Fund must be not less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward the unspent part of such 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The fund is invested in a discretionary agreement with abdrn (formerly Aberdeen Standard Capital). Charlie Thompson and Rob Richardson took over as account managers in July 2019 and work together to maximise the long-term return whilst providing a good level of income as agreed with the Board. Charlie has 19 years of investment experience, is a Chartered Wealth Manager and is a Fellow of the Chartered Institute for Securities and Investment. Rob has seven years of investment experience, is an IMC holder and an Associate Member of the Chartered Institute for Securities and Investment.

The Board has adopted an ethical policy for the investment of these funds, namely, not to invest in any companies involved in the manufacture and distribution of tobacco and arms or any companies that boycott Israel.

#### RISK ASSESSMENT

Risk management is reviewed regularly by staff and a Risk Register is submitted to the Board for approval on an annual basis. The Directors have identified the main risks to which the charitable company is exposed and have taken steps to mitigate them.

#### LOOKING AHEAD

As well as the reports mentioned above, JPR has several exciting projects to look forward to in 2023.

- **Analysis of 2021 Census data** as the Office for National Statistics releases further data throughout the year. JPR will be working to understand the data being released including such issues as the underreporting of haredi Jews, and the uncertainty about the numbers of Jews who have identified as Jewish exclusively by ethnicity. JPR plans to present the findings to community leaders wherever possible and utilise the new data to support various projects commissioned by community organisations that are keen to understand demographic issues relevant to their own planning.
- Continuing development of JPR's **UK Jewish population Research Panel** with a particular emphasis on increasing the representation from the strictly Orthodox community, young adults and Jews who are not affiliated with the Jewish community. In addition, JPR will continue to enhance the technological infrastructure that holds the panel, to help mechanise data processing to aid analytical effectiveness and efficiency.
- Using the Research Panel, JPR plans to run a UK version of the European Union Agency for Fundamental Rights (FRA) **survey of Jewish people's perceptions and experiences of antisemitism**. FRA will run the survey within the EU in early 2023 and JPR will utilise a similar questionnaire to assess the current position of Jews in the UK, in order to compare that with opinions measured in the equivalent previous surveys from 2018 and 2012. We expect to publish the findings in 2024.
- JPR will look to run a **survey of the haredi community** in 2023 in cooperation with the Interlink Foundation and Pinter Trust. The purpose is primarily to gather data to support the work of these two organisations, but it also designed to help JPR to recruit more haredim to the panel to ensure better representation of haredi Jews in future surveys.
- JPR will continue to develop its **European Jewish demography programme**. A new country report on Spain is planned, as well as a similar study in the Netherlands (part-funded by the Dutch Jewish community) and a new report on patterns of migration to and from Europe.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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- JPR will continue to maintain its **archive of research on contemporary European Jewish life**. The archive, which was established in 2014, is the repository of all social research on Jewish life in Europe since 1990. The Institute has secured further funding from the Rothschild Foundation until 2025, which will enable it to continue to employ an archive manager to seek out and add new items to the archive.
- JPR will seek to complete a study of **Jewish community income and expenditure** to assess both how the community fared during the pandemic and establish benchmarks by which we can do ongoing work to determine whether income levels are going up or down over time.
- Working together with Ipsos, JPR won a **tender from the European Commission (EC)** in 2023 for its study of attitudes towards Jews in all 27 EU Member States. This is the largest and most high-profile project JPR has won, and forms a central part of the EC strategy to combat antisemitism across Europe. The project is scheduled to begin in September 2023, and will run until 2025. Subject to permission from the EC and securing the necessary funding, JPR hopes to be able to extend the survey into the UK.

### STRUCTURE, GOVERNANCE AND MANAGEMENT

The Institute for Jewish Policy Research (JPR) is a registered charitable company and a company limited by guarantee. JPR is governed by its Articles of Association and by the regulations of the Charity Commission and company law.

JPR's governance structure consists of the Board of Directors and a working group of Honorary Officers (Chair and Treasurer), who oversee management matters. Members of the Board are non-executive Directors and Trustees of the charitable company. They determine the overall direction of JPR, provide leadership and fulfil their fiduciary responsibilities.

The Members of the Board of Directors who served during 2022 are:

Stephen Moss CBE (Chairman)	(appointed 07/09/2010)
Lord Leigh of Hurley (President)	(appointed 29/06/2015)
Michael Karp OBE	(appointed 21/01/2015)
Elizabeth Crossick	(appointed 29/06/2015)
Sergio DellaPergola	(appointed 28/01/2019 and retired 04/02/2022)
Jonathan Haskel CBE	(appointed 28/10/2019)
Miles Webber	(appointed 17/04/2020)
Hilda Worth	(appointed 06/07/2020 and retired 20/02/2023)
William Benjamin	(appointed 17/04/2020)

Early in 2022, Professor Sergio DellaPergola retired from the Board. He contributed greatly to the work of the charity and we are delighted that he remains one of JPR's Senior Research Advisers, as well as Chair of the Institute's European Jewish Demography Unit. Hilda Wirth also stepped down from the Board later in the year. Hilda contributed greatly to JPR and her input will be greatly missed by the Trustees.

JPR also has three Honorary Vice Presidents, who hold a general oversight role as required. They were Lord Haskel, Harold Paisner and Brian Smouha, all of whom previously held senior positions on the Board of Directors. Sadly, Brian Smouha passed away in 2023. Sir Trevor Chinn recently agreed to become an Honorary Vice-President, and his position was approved by the Trustees in July 2023.

Trustees are appointed (or reappointed, as the case may be) for a three-year term of office on the recommendation of the Chairman and require approval by the Board. Under usual circumstances, Trustees can serve a maximum of three consecutive terms of office. An amendment was added to the Articles of Association in 2017, allowing for the possibility of further extensions in special circumstances. This amendment was passed by adopting a Special Resolution at the General Meeting of the Company on October 23rd, 2017. It was determined that any further additional term or terms (of any such length as is determined by the Trustees), would need to be approved at a meeting of the Trustees.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## TRUSTEES' REPORT (INCLUDING DIRECTORS' REPORT) (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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The Trustees must appoint a Chairman from among their number. An amendment was added to the Articles of Association in 2021 to allow the Chairman to serve for three three-year terms, instead of two, and this may be extended by a single year as an emergency measure. The Chairman may only hold office for such time as he or she is a Trustee.

At all times there must be a President of the Charity, who is appointed by the Trustees. The President may also be a Trustee of the Charity if appointed as such by the Trustees. The President holds office for a three-year term and may be reappointed by the Trustees for any number of further three-year terms as the Trustees see fit.

The Board appoints the Executive Director, who reports to the Board on the substantive areas of the Institute's management. The Board can appoint a Company Secretary who oversees the work in matters of compliance with company and charitable company law. While day-to-day matters are delegated to the staff, all substantive decisions are referred to the Board for approval.

The Board also appoints a Finance Committee which meets regularly during the year to oversee the annual audit, investment strategy and charge-out rate for commissions and to carry out an annual financial review; a Fundraising Committee which sets out and supports the fundraising strategy and monitors its progress during the year; and a Nominations Committee to oversee succession planning for the JPR Board and Committees. In addition, the Chairman and the Treasurer both review staff salaries each year and must approve any changes.

On acceptance to the Board, the Trustees receive the JPR Governance Handbook, which outlines JPR's governance structure and the responsibilities of Board members, and up-to-date documentation on the Institute's aims and programmes.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £205,194 (2021 £194,662). The Chairman and Treasurer review the salaries of all employees annually, including the above-mentioned two key management personnel, with reference to their duties and responsibilities, having regard to the resources of JPR, charity remuneration benchmarks and employment legislation.

#### **Auditor**

In accordance with Section 485 of the Companies Act 2006, a resolution proposing that Sobell Rhodes LLP (formerly Martin May) be reappointed as auditors of the company will be put to the Annual General Meeting.

The trustees' report was approved by the Board of Trustees.

Stephen Moss CBE  
**Chairman**

Date: 27 September 2023

# **INSTITUTE FOR JEWISH POLICY RESEARCH**

## **STATEMENT OF TRUSTEES' RESPONSIBILITIES**

### ***FOR THE YEAR ENDED 31 DECEMBER 2022***

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The trustees, who are also the directors of Institute for Jewish Policy Research for the purpose of company law, are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (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 charity and of the incoming resources and application of resources, including the income and expenditure, of the charitable company for that year.

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 judgements and estimates that are reasonable and prudent; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in operation.

The trustees are responsible for keeping adequate accounting records that disclose with reasonable accuracy at any time the financial position of the charity and enable them to ensure that the financial statements comply with the Companies Act 2006 and Charities Act 2011. They are also responsible for safeguarding the assets of the charity 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 charity'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.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## INDEPENDENT AUDITOR'S REPORT

### TO THE TRUSTEES OF INSTITUTE FOR JEWISH POLICY RESEARCH

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#### Opinion

We have audited the financial statements of Institute for Jewish Policy Research (the 'charity') for the year ended 31 December 2022 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and notes to the financial statements, including 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).

In our opinion, the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 December 2022 and of its incoming resources and application of resources, 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 trustees with respect to going concern are described in the relevant sections of this report.

#### Other information

The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. Our opinion on the financial statements does not cover the other information and we do not express any form of assurance conclusion thereon. 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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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.

#### Matters on which we are required to report by exception

We have nothing to report in respect of the following matters in relation to which the Charities (Accounts and Reports) Regulations 2008 require us to report to you if, in our opinion:

- the information given in the financial statements is inconsistent in any material respect with the trustees' report; or
- sufficient accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records; or
- we have not received all the information and explanations we require for our audit.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## INDEPENDENT AUDITOR'S REPORT (CONTINUED)

### TO THE TRUSTEES OF INSTITUTE FOR JEWISH POLICY RESEARCH

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#### **Responsibilities of trustees**

As explained more fully in the statement of trustees' responsibilities, the trustees, who are also the directors of the charity for the purpose 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 the trustees 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 charitable company or to cease operations, or have no realistic alternative but to do so.

#### **Auditor's responsibilities for the audit of the financial statements**

We have been appointed as auditor under section 144 of the Charities Act 2011 and report in accordance with the Act and relevant regulations made or having effect thereunder.

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, is detailed below.

We enquired of management to obtain an understanding of the legal and regulatory frameworks that are applicable to the charity. The most significant that are relevant to the charity are the United Kingdom Generally Accepted Accounting Practices, the Companies Act 2006 and the Charities Statement of Recommended Practice (SORP) and the tax legislation in respect of Corporation tax, VAT and PAYE. We understood how the charity complies with these through enquiries of management and asked of any instances of non-compliance in these areas.

We assessed the susceptibility of the charity's financial statements to material misstatements, including how fraud might occur through enquiries of management and to understand where they considered there was susceptibility to fraud. We obtained an understanding of the controls that the charity has established to address the risk that prevents, deters, and detects fraud.

Based on this understanding, we designed our audit procedures to detect irregularities including fraud which primarily consisted of the following:

1. Identifying and testing of journal entries including large and unusual transactions to understand their rationale.
2. Enquiries of management and those charged with governance on instances of any known fraud and around actual and potential litigation claims.
3. Enquiries of the tax engagement team that are independent of the audit team for instances of non-compliance.

The Senior Statutory Auditor reviewed the experience and expertise of the audit engagement team to ensure that they had the appropriate competence and capabilities to identify any instances of fraud and non-compliance with the relevant laws and regulations.

The objective of our audit, in respect of fraud, are: to identify and assess the risks of material misstatement of the financial statements due to fraud; to obtain sufficient appropriate audit evidence regarding the assessed risk of material misstatement due to fraud, through designing and implementing appropriate responses; and to respond appropriately to fraud or suspected fraud identified during the audit. However, the primary responsibility for the prevention and detection of fraud rests with both those charged with governance of the entity and management.

The extent to which our procedures are capable of detecting irregularities, including fraud, is detailed below.

A further description of our responsibilities is available on the Financial Reporting Council's website at: <https://www.frc.org.uk/auditorsresponsibilities>. This description forms part of our auditor's report.

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# **INSTITUTE FOR JEWISH POLICY RESEARCH**

## **INDEPENDENT AUDITOR'S REPORT (CONTINUED)**

### **TO THE TRUSTEES OF INSTITUTE FOR JEWISH POLICY RESEARCH**

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#### **Use of our report**

This report is made solely to the charity's trustees, as a body, in accordance with part 4 of the Charities (Accounts and Reports) Regulations 2008. Our audit work has been undertaken so that we might state to the charity's trustees 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 trustees as a body, for our audit work, for this report, or for the opinions we have formed.

**Adam Shelley BA ACCA (Senior Statutory Auditor)**  
**for and on behalf of Sobell Rhodes Audit Limited**

28 September 2023

**Chartered Accountants**  
**Statutory Auditor**

The Kinetic Centre  
Theobald Street  
Elstree  
Borehamwood  
Hertfordshire  
United Kingdom  
WD6 4PJ

Sobell Rhodes Audit Limited is eligible for appointment as auditor of the charity by virtue of its eligibility for appointment as auditor of a company under section 1212 of the Companies Act 2006.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## STATEMENT OF FINANCIAL ACTIVITIES

FOR THE YEAR ENDED 31 DECEMBER 2022

	Notes	Unrestricted funds 2022 £	Restricted funds 2022 £	Endowment funds 2022 £	Total Unrestricted funds 2022 £	Restricted funds 2021 £	Endowment funds 2021 £	Total 2021 £
<b><u>Income from:</u></b>								
Donations and legacies	3	153,524	-	-	153,524	-	-	195,530
Charitable activities	4	458,494	240,946	-	699,440	297,555	-	584,390
Investments	5	100,310	-	-	100,310	-	-	100,032
<b>Total income</b>		712,328	240,946	-	953,274	297,555	-	879,952
<b><u>Expenditure on:</u></b>								
Raising funds	6	53,427	-	18,777	72,204	-	20,211	77,683
Charitable activities	7	613,213	371,776	-	984,989	222,867	-	767,408
<b>Total expenditure</b>		666,640	371,776	18,777	1,057,193	222,867	20,211	845,091
Net gains/(losses) on investments	12	-	-	(237,764)	(237,764)	-	202,612	202,612
<b>Net incoming/(outgoing) resources before transfers</b>		45,688	(130,830)	(256,541)	(341,683)	74,688	182,401	237,473

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**STATEMENT OF FINANCIAL ACTIVITIES (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

	Notes	Unrestricted funds		Restricted funds		Endowment funds		Total Unrestricted funds		Restricted funds		Endowment funds		Total	
		2022	£	2022	£	2022	£	2022	£	2021	£	2021	£	2021	£
<b>Net incoming/(outgoing) resources before transfers</b>		45,688		(130,830)		(256,541)		(341,683)		74,688		182,401		237,473	
Gross transfers between funds		(53,870)		53,870		-		(34,044)		34,044		-		-	
<b>Net movement in funds</b>		(8,182)		(76,960)		(256,541)		(341,683)		108,732		182,401		237,473	
Fund balances at 1 January 2022		376,684		108,732		2,858,276		3,343,692		-		2,675,875		3,106,219	
<b>Fund balances at 31 December 2022</b>		<u>368,502</u>		<u>31,772</u>		<u>2,601,735</u>		<u>3,002,009</u>		<u>108,732</u>		<u>2,858,276</u>		<u>3,343,692</u>	

The statement of financial activities includes all gains and losses recognised in the year.

All income and expenditure derive from continuing activities.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## BALANCE SHEET

AS AT 31 DECEMBER 2022

	Notes	2022		2021	
		£	£	£	£
<b>Fixed assets</b>					
Intangible assets	14		4,150		4,980
Tangible assets	15		88,622		101,800
Investments	16		2,665,530		2,932,100
			<u>2,758,302</u>		<u>3,038,880</u>
<b>Current assets</b>					
Debtors	17	78,253		36,055	
Cash at bank and in hand		234,313		330,521	
		<u>312,566</u>		<u>366,576</u>	
<b>Creditors: amounts falling due within one year</b>	18	(68,859)		(61,764)	
Net current assets			<u>243,707</u>		<u>304,812</u>
<b>Total assets less current liabilities</b>			<u>3,002,009</u>		<u>3,343,692</u>
<b>Capital funds</b>					
Endowment funds - general	19		2,601,735		2,858,276
<b>Income funds</b>					
Restricted funds	20		31,772		108,732
<u>Unrestricted funds</u>					
Designated Funds		-		150,000	
General Funds		368,502		226,684	
		<u>368,502</u>		<u>376,684</u>	
			<u>368,502</u>		<u>376,684</u>
			<u>3,002,009</u>		<u>3,343,692</u>

# **INSTITUTE FOR JEWISH POLICY RESEARCH**

## **BALANCE SHEET (CONTINUED)**

***AS AT 31 DECEMBER 2022***

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The company is entitled to the exemption from the audit requirement contained in section 477 of the Companies Act 2006, for the year ended 31 December 2022, although an audit has been carried out under section 144 of the Charities Act 2011.

The directors acknowledge their responsibilities for complying with the requirements of the Companies Act 2006 with respect to accounting records and the preparation of financial statements.

These financial statements have been prepared in accordance with the provisions applicable to companies subject to the small companies regime.

The financial statements were approved by the Trustees on 27 September 2023

Stephen Moss CBE  
**Chairman**

Michael Karp OBE  
**Treasurer**

**Company registration number 894309**

# INSTITUTE FOR JEWISH POLICY RESEARCH

## STATEMENT OF CASH FLOWS

FOR THE YEAR ENDED 31 DECEMBER 2022

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	Notes	2022 £	£	2021 £	£
<b>Cash flows from operating activities</b>					
Cash absorbed by operations	22		(224,930)		(37,990)
<b>Investing activities</b>					
Purchase of tangible fixed assets		-		(93,808)	
Payment to investment manager fees		18,777		20,211	
Income from investments		109,945		100,000	
<b>Net cash generated from investing activities</b>			128,722		26,403
<b>Net cash used in financing activities</b>			-		-
<b>Net decrease in cash and cash equivalents</b>			(96,208)		(11,587)
Cash and cash equivalents at beginning of year			330,521		342,108
<b>Cash and cash equivalents at end of year</b>			234,313		330,521

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# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS

**FOR THE YEAR ENDED 31 DECEMBER 2022**

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### 1 Accounting policies

#### Charity information

The Institute for Jewish Policy Research is a private company limited by guarantee registered in England and Wales. In the event of the Charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the Charity. The address of the registered office is given in the Charity Information on page 1 of these financial statements. The nature of the charity's operations and principal activities are noted in the Report of the Directors.

#### 1.1 Accounting convention

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, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the Charity and rounded to the nearest £1.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

#### 1.2 Charitable funds

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the Charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of the designated funds are set out in the notes to the financial statements.

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.

Permanent endowment funds represent those assets which must be held permanently by the charity, principally comprising of investments. Income arising on the permanent endowment funds can be used in accordance with the objects of the Charity and is included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund. Investment management charges and legal advice relating to the fund are charged against the fund.

#### 1.3 Income

All incoming resources are included in the Statement of Financial Activities (SoFA) when the Charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the Charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the Charity and it is probable that they will be fulfilled.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### 1 Accounting policies

(Continued)

For legacies, entitlement is the earlier of the charity being notified of an impending distribution or the legacy being received. At this point income is recognised. On occasion legacies will be notified to the charity however it is not possible to measure the amount expected to be distributed. On these occasions, the legacy is treated as a contingent asset and disclosed.

Income from performance related grants are recognised at fair value when the Charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Investment income is earned through holding assets for investment purposes such as shares and property. It includes dividends and interest. It is included when the amount can be measured reliably. Interest income is recognised using the effective interest method and dividends are recognised as the charity's right to receive payment is established.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

#### 1.4 Expenditure

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings. Note 5 should be referred to for details of the nature and cost involved:

- Costs of raising funds
- Expenditure on charitable activities
- Other expenditure represents those items not falling into the categories above.

Support costs are those that assist the work of the Charity but do not directly represent charitable activities and include office costs, governance costs and administrative payroll costs. They are incurred directly in support of expenditure on the objects of the charity. Where support costs cannot be directly attributed to particular headings they have been allocated to costs of raising funds and expenditure on charitable activities on a basis consistent with use of the resources. Support costs detailed under note 5 are allocated on the basis apportionment of the time spent on these activities.

Costs of raising funds are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities.

The analysis of these costs is included in note 5.

#### 1.5 Intangible fixed assets other than goodwill

Intangible fixed assets are measured at cost less accumulative amortisation and any accumulative impairment losses. Trade marks are written off over their useful life.

#### 1.6 Tangible fixed assets

Tangible fixed assets are initially measured at cost and subsequently measured at cost or valuation, net of depreciation and any impairment losses.

Depreciation is recognised so as to write off the cost or valuation of assets less their residual values over their useful lives on the following bases:

Improvement to leasehold building	Over the terms of lease
Fixtures and fittings	25% Straight Line
Computer equipment	33.33% Straight Line

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### 1 Accounting policies

(Continued)

The gain or loss arising on the disposal of an asset is determined as the difference between the sale proceeds and the carrying value of the asset, and is recognised in the statement of financial activities.

#### 1.7 Investments

Investments are recognised initially at fair value which is normally the transaction price including transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains / (losses) on investments' in the SoFA if the shares are publicly traded or their fair value can otherwise be measured reliably. Other investments are measured at cost less impairment.

#### 1.8 Impairment of fixed assets

Assets not measured at fair value are reviewed for any indication that the asset may be impaired at each balance sheet date. If such indication exists, the recoverable amount of the asset, or the asset's cash generating unit, is estimated and compared to the carrying amount. Where the carrying amount exceeds its recoverable amount, an impairment loss is recognised in the SoFA unless the asset is carried at a revalued amount where the impairment loss is a revaluation decrease.

#### 1.9 Cash and cash equivalents

Cash and cash equivalents include cash in hand, deposits held at call with banks, other short-term liquid investments with original maturities of three months or less, and bank overdrafts. Bank overdrafts are shown within borrowings in current liabilities.

Rentals payable under operating leases are charged to the SoFA on a straight line basis over the period of the lease.

#### 1.10 Foreign exchange

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.

#### 1.11 Provisions

Provisions are recognised when the Charity has an obligation at the balance sheet date as a result of a past event, it is probable that an outflow of economic benefits will be required in settlement and the amount can be reliably estimated.

#### 1.12 Leasing

Rentals payable under operating leases are charged to the SoFA on a straight line basis over the period of the lease.

#### 1.13 Pensions

The charitable company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the charitable company in independently administered funds. Contributions are charged to the Statement of Financial Activities as they become payable in accordance with the rules of the scheme.

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### 2 Critical accounting estimates and judgements

In the application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates. In preparing these financial statements, the trustees have made the following key judgments:

a) The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorising these financial statements. They believe there will be sufficient funds available to support the core costs of the Charity.

b) To determine the proportion of commissioned projects that have been completed, the trustees use costs incurred as a basis and judge that income to be recognised is equivalent to that. Any actual surplus or deficit is determined at project completion and transferred to or from unrestricted funds.

#### 3 Donations and legacies

	<b>Unrestricted funds</b>	Unrestricted funds
	<b>2022</b>	2021
	£	£
Donations and gifts	153,524	195,530
	<u>          </u>	<u>          </u>

#### 4 Charitable activities

	<b>Charitable Activities</b>	<b>Charitable Activities</b>
	<b>2022</b>	<b>2021</b>
	£	£
Research projects and sales of reports	699,440	584,390
	<u>          </u>	<u>          </u>
Analysis by fund		
Unrestricted funds	458,494	286,835
Restricted funds	240,946	297,555
	<u>          </u>	<u>          </u>
	699,440	584,390
	<u>          </u>	<u>          </u>

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

### 5 Investments

	Unrestricted funds	Restricted funds	Unrestricted funds	Restricted funds
	2022 £	2022 £	2021 £	2021 £
General bank interest receivable	394	-	32	-
Income from MCA permanent endowment fund	99,916	-	100,000	-
	<u>100,310</u>	<u>-</u>	<u>100,032</u>	<u>-</u>

### 6 Raising funds

	Unrestricted funds	Endowment funds general	Total	Unrestricted funds	Endowment funds general	Total
	2022 £	2022 £	2022 £	2021 £	2021 £	2021 £
<u>Fundraising and publicity</u>						
Fund raising for donations	53,427	-	53,427	57,472	-	57,472
Support costs	-	18,777	18,777	-	20,211	20,211
	<u>53,427</u>	<u>18,777</u>	<u>72,204</u>	<u>57,472</u>	<u>20,211</u>	<u>77,683</u>
	<u>53,427</u>	<u>18,777</u>	<u>72,204</u>	<u>57,472</u>	<u>20,211</u>	<u>77,683</u>

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

#### 7 Charitable activities

	Charitable Expenditure 2022 £	Charitable Expenditure 2021 £
Research project costs	620,225	445,725
Lectures and seminars	15,514	20,712
Research and organisational development costs	104,156	80,433
	<u>739,895</u>	<u>546,870</u>
Share of support costs (see note 8)	245,094	220,538
	<u>984,989</u>	<u>767,408</u>
<b>Analysis by fund</b>		
Unrestricted funds	613,213	544,541
Restricted funds	371,776	222,867
	<u>984,989</u>	<u>767,408</u>

#### 8 Support & governance costs

	Support costs £	Governance costs £	2022 £	2021 £
Bad debts	-	-	-	(659)
Database	1,935	-	1,935	2,088
Staff Cost	67,275	-	67,275	65,663
Premises	71,391	-	71,391	75,196
General office costs	40,102	-	40,102	38,395
Depreciation and leasehold amortisation	13,178	-	13,178	12,477
Bank charges and exchange rate difference	1,175	-	1,175	2,165
Amortisation of trade marks	830	-	830	830
Research & development costs	17,512	-	17,512	-
Auditor Remuneration	-	25,200	25,200	19,175
Legal and professional	-	6,496	6,496	5,208
	<u>213,398</u>	<u>31,696</u>	<u>245,094</u>	<u>220,538</u>

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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#### 9 Auditor's remuneration

The analysis of auditor's remuneration is as follows:

	£	£
Audit of the Charity's annual accounts	21,500	12,375
Other services - preparation of the Charity's annual accounts	3,700	3,500
Adjustment to prior year provision		3,300
	<hr/>	<hr/>
<b>Total audit fees</b>	<b>25,200</b>	<b>19,175</b>
	<hr/> <hr/>	<hr/> <hr/>

#### 10 Trustees

None of the trustees received remuneration for their services nor did they receive any reimbursement of expenses during the year.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £205,194 (2021 £194,662).

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

#### 11 Employees

##### Number of employees

The average monthly number of employees during the year was:

	<b>2022</b>	<b>2021</b>
	<b>Number</b>	<b>Number</b>
Average number of employees	10	9

##### Employment costs

	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
Wages and salaries	546,530	490,793
Social security costs	60,313	52,780
Pension costs	34,959	29,129
	<u>641,802</u>	<u>572,702</u>

The number of employees whose annual remuneration was £60,000 or more were:

	<b>2022</b>	<b>2021</b>
	<b>Number</b>	<b>Number</b>
£60,001 - £70,000	1	1
£70,001 - £80,000	-	-
£80,001 - £90,000	1	2
£90,001 - £100,000	1	-
£100,001 - £110,000	-	-
£110,001 - £120,000	1	1
£120,001 - £130,000	-	-
£130,001 - £140,000	-	-

#### 12 Net gains/(losses) on investments

	<b>Endowment</b>	<b>Endowment</b>
	<b>funds</b>	<b>funds</b>
	<b>general</b>	<b>general</b>
	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
Revaluation of investments	(237,764)	202,612

#### 13 Pension costs

The charitable company operates a contributory pension scheme. It is a defined contribution scheme and contributions are charged in the statement of financial activities as they are paid. The charge for the year was £34,959 (2021 - £32,502) and the liability outstanding at the year end was £1,204 (2021 £1,692).

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

#### 14 Intangible fixed assets

	Trademark £
<b>Cost</b>	
At 1 January 2022 and 31 December 2022	8,300
<b>Amortisation and impairment</b>	
At 1 January 2022	3,320
Amortisation charged for the year	830
At 31 December 2022	4,150
<b>Carrying amount</b>	
At 31 December 2022	4,150
At 31 December 2021	4,980

#### 15 Tangible fixed assets

	Improvement to leasehold building £	Fixtures and fittings £	Computer equipment £	Total £
<b>Cost</b>				
At 1 January 2022	101,392	9,595	14,847	125,834
At 31 December 2022	101,392	9,595	14,847	125,834
<b>Depreciation and impairment</b>				
At 1 January 2022	9,142	1,488	13,404	24,034
Depreciation charged in the year	10,056	1,919	1,203	13,178
At 31 December 2022	19,198	3,407	14,607	37,212
<b>Carrying amount</b>				
At 31 December 2022	82,194	6,188	240	88,622
At 31 December 2021	92,250	8,107	1,443	101,800

#### 16 Fixed asset investments in MCA permanent endowment fund

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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16 Fixed asset investments in MCA permanent endowment fund	(Continued)
	<b>Total £</b>
<b>Fair value</b>	
Fair value brought forward	2,932,100
Investment return: dividends and interest	99,916
Investment return: income paid out	(109,945)
Investment management costs	(18,777)
Investment return: net of realised and unrealised losses	(237,764)
	<hr/>
Fair value carried forward	2,665,530
	<hr/>
<b>Historical cost</b>	
At 31 December 2022	2,299,226
	<hr/> <hr/>
At 31 December 2021	2,312,353
	<hr/> <hr/>
Investment at fair value comprised:	
Equity shares	2,210,248
Fixed interest securities	338,356
Cash deposits/funds	66,833
Property funds	50,093
	<hr/> <hr/>
	2,665,530
	<hr/> <hr/>

The fair value of listed investments is determined by reference to the quoted stock market price at the balance sheet date.

Other investments are measured using the following methods:

- a) UK government securities using the London Official Bid & Ask price to calculate the mid-price.
- b) Unlisted and suspended securities at a zero value.
- c) Securities in liquidation using the most recent and reliable valuations available. The most reliable valuation may include using Aberdeen Standard Capital's best price estimates.
- d) Unlisted Floating Rate Notes valued at face or nominal value.
- e) Investments with extended settlement periods (e.g. hedge funds, placings and some unit trusts) use the latest available Net Asset Value.
- f) All values provided are as at the close of business on the valuation date. If the valuation date falls on a non-business day, the prices quoted will be those as at the close of business on the last business day

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

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### 17 Debtors

	<b>2022</b>	<b>2021</b>
	£	£
<b>Amounts falling due within one year:</b>		
Other debtors	24,254	7,587
Prepayments and accrued income	53,999	28,468
	<u>78,253</u>	<u>36,055</u>

### 18 Creditors: amounts falling due within one year

	<b>2022</b>	<b>2021</b>
	£	£
Other taxation and social security	17,444	16,729
Trade creditors	8,622	19,930
Other creditors	8,749	8,791
Accruals and deferred income	34,044	16,314
	<u>68,859</u>	<u>61,764</u>

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

19 Endowment funds	Balance at 1 January 2021	Movement in funds			Utilised 1 January 2022	Balance at 1 January 2022	Incoming resources	Movement in funds			Utilised 31 December 2022	Balance at 31 December 2022
		Incoming resources	Resources expended	New Designation				Resources expended	New Designation			
	£	£	£	£	£	£	£	£	£	£	£	£
<b>MCA permanent endowment fund</b>												
	2,675,875	-	-	-	182,401	2,858,276	-	-	-	(256,541)	2,601,735	
	2,675,875	-	-	-	182,401	2,858,276	-	-	-	(256,541)	2,601,735	

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

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**19 Endowment funds**

**(Continued)**

The charitable company has restricted rights over the capital. It is entitled to the total income, realised and unrealised gains, in any financial year provided these do not exceed 8% of the original grant (£3,466,337) adjusted for inflation.

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the organising and carrying out of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of these purposes. The income of the Fund may be spent by the Charity on a year to year basis as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000 converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

In order for capital to be spent it is necessary to satisfy conditions:

(1) The first condition is that the total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.

(2) The second condition is that 30 days before the trustees resolve to spend the capital, the market value of the capital of the Fund must not be less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward unspent part of the 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The Fund is invested on professional advice in order to obtain the maximum long-term return (net of any tax) which is regarded from time to time as a prudent target for the Fund.

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

**20 Restricted funds**

The income funds of the charity include restricted funds comprising the following unexpended balances of donations and grants held on trust for specific purposes:

	Movement in funds			Movement in funds			Movement in funds		
	Incoming resources	Resources expended	Transfer (to)/ from unrestricted funds	Incoming resources	Resources expended	Transfer (to)/ from unrestricted funds	Incoming resources	Resources expended	Transfer (to)/ from unrestricted funds
	£	£	£	£	£	£	£	£	£
Project: European Jewish Demography Unit	131,122	(142,400)	11,278	-	(168,198)	51,198	117,000	-	-
Project: European Jewish Research Archive	-	(18,837)	18,837	-	-	-	-	-	-
Commission: Jewish Blind and Disabled (JBD)	7,845	(5,431)	(2,414)	-	-	-	-	-	-
Commission: JW3 Monitoring and Evaluation Project	2,664	(2,336)	-	328	(1,453)	1,125	-	-	-
Commission: Industrial Dwellings Society (IDS)	15,856	(8,003)	(7,853)	-	-	-	-	-	-
Project: Study of Antisemitic Attitudes	28,800	-	-	28,800	-	-	-	-	28,800
Project: Communications	84,974	(5,370)	-	79,604	(136,632)	-	60,000	(2,802)	2,972
Commission: IDS II - Industrial dwellings society II	11,910	(11,910)	-	-	(2,802)	(3,223)	6,025	-	-
Commission: EVENS	7,000	(13,785)	6,785	-	-	-	-	-	-
Commission: European Jewish Association	7,384	(14,795)	7,411	-	-	(12,660)	12,660	(12,660)	-
Commission: Census 2021	-	-	-	-	(21,758)	11,758	10,000	(21,758)	-
Project: European Commission Mapping	-	-	-	-	(31,041)	-	31,041	(31,041)	-
Commission: Manchester JRC & Mobilise	-	-	-	-	(9,892)	5,672	4,220	(9,892)	-
	297,555	(222,867)	34,044	108,732	(371,776)	53,870	240,946	(371,776)	31,772

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

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**20 Restricted funds**

**(Continued)**

The aim and use of each restricted fund is as follows:

- (a) Project: European Jewish Demographic Unit - Established in January 2019, JPR's European Jewish Demography Unit is dedicated to generating data about Jewish populations in Europe to help support community development across the continent. Currently supported by the Rothschild Foundation Hanadiv Europe, it is led by JPR Senior Research Fellow, Dr Daniel Staetsky, and chaired by the world's leading expert in Jewish demography, Professor Sergio DellaPergola.
- (b) Project: The European Jewish Research Archive: supported by Rothschild Foundation Hanadiv Europe, this is a project to build and maintain an online free to access archive of research publications on contemporary European Jewish communities. The archive includes reports, articles and other relevant materials that draw on, or discuss, social research on European Jewish communities since 1990.
- (c) Commission: Jewish Blind and Disabled (JBD) – this study was designed to look at the socio-demographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of JBD's strategic review.
- (d) Commission: JW3 Monitoring and Evaluation Project – this annual study is aimed at helping JW3 to monitor and evaluate the effectiveness of their work. It involves helping them to determine what they need to measure in view of their new strategic plan, advising them on how best to gather the required data, and then working with them to determine how best to use it for their purposes.
- (e) Commission: Industrial Dwellings Society (IDS) – this project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of specific sites to support IDS's future planning.
- (f) Project: Study of Antisemitic Attitudes - first run by JPR together with Ipsos MORI in 2017, this survey, monitoring anti-Jewish and anti-Israel attitudes among the British population, was due to be repeated in 2020. However, due to restrictions imposed by the Covid-19 pandemic, the study was postponed, and is now expected to take place in 2024/5.
- (g) Project: Communications - With thanks to support from three key foundations, JPR recruited its first Director of Communications in October 2021. The priorities for the first year of the position are (i) to communicate JPR's research outputs to the media and key target audiences; (ii) to redesign the JPR website; and (iii) to build JPR's social media presence. Work began on all three of these areas in the last quarter of 2021 and the new website was launched in October 2022.
- (h) Commission: IDS II – Industrial dwellings society II – This project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity to support IDS's future planning for a Jewish housing association working to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services.
- (i) Commission: EVENS – a national survey designed to gather information about inequality among ethnic minorities. Our input is specifically designed to help them gather data on Jews and advice on how to analyse it, although we also hope to learn from their work to help inform our own future analysis of Jewish populations.

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

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**20 Restricted funds**

**(Continued)**

(j) Commission: European Jewish Association - The European Jewish Association commissioned JPR to create an index to measure how different European countries are faring with regard to major Jewish concerns.

(k) Commission: Census 2021 - The JLC provided a small grant to support JPR's ongoing analysis of Jewish population data gathered by the Office of National Statistics in the 2021 Census of England and Wales, and general research advice to support the JLC's own work. The grant included funds for a joint event to share the findings of JPR's first report on the initial release of census data.

(L) Project: European Commission Mapping - As part of the EU strategy on combating antisemitism and fostering Jewish life, the European Commission (EC) has committed to creating a European research hub on contemporary antisemitism and Jewish life. The EC commissioned JPR to map the research field and make recommendations about how the proposed hub should support research on antisemitism and Jewish life in future.

(M) Commission: Manchester-JRC & Mobilise - JPR and Mobilise collaborated on a mapping exercise commissioned by the Manchester Jewish Representative Council. The purpose of the exercise was to support strategic discussions about service provision in the Greater Manchester area. JPR's role was to identify existing services in their main areas of interest such as children, young people and families. The findings were presented in September to community and local government representatives in Manchester.

All the funds represent donations received and take into account the research costs incurred during the year.

**INSTITUTE FOR JEWISH POLICY RESEARCH**  
**NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)**  
**FOR THE YEAR ENDED 31 DECEMBER 2022**

21 Analysis of net assets between funds	Unrestricted funds		Restricted funds		Endowment funds		Total	
	2022	£	2022	£	2022	£	2021	£
Fund balances at 31 December 2022 are represented by:								
Intangible fixed assets	4,150		-		-		-	4,980
Tangible assets	88,622		-		-		-	101,800
Investments	63,795		-	2,601,735	-	2,858,276	-	2,932,100
Current assets/(liabilities)	211,935		31,772	-	108,732	-	-	304,812
	<u>368,502</u>		<u>31,772</u>	<u>2,601,735</u>	<u>108,732</u>	<u>2,858,276</u>	<u>108,732</u>	<u>3,343,692</u>

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

### FOR THE YEAR ENDED 31 DECEMBER 2022

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<b>22 Cash generated from operations</b>	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
(Deficit)/surplus for the year	(341,683)	237,473
Adjustments for:		
Investment income recognised in statement of financial activities	(99,916)	(98,102)
Fair value gains and losses on investments	237,764	(202,612)
Amortisation and impairment of intangible assets	830	830
Depreciation and impairment of tangible fixed assets	13,178	12,477
Movements in working capital:		
(Increase)/decrease in debtors	(42,198)	22,728
Increase/(decrease) in creditors	7,095	(10,784)
<b>Cash absorbed by operations</b>	<b>(224,930)</b>	<b>(37,990)</b>

### 23 Operating lease commitments

At the year end the company had annual commitments under a non-cancellable property lease as set out below:

	<b>2022</b>	<b>2021</b>
	<b>£</b>	<b>£</b>
Within one year	45,520	45,520
Between two and five years	155,239	155,329
In over five years	145,165	190,685
	<u>345,924</u>	<u>391,534</u>

Total lease payments made during the year amounted to £45,520 (2021: £24,125)

### 24 Financial commitments, guarantees and contingent liabilities

Contractual commitments for the refurbishment work for the office contracted for but not provided in the financial statements amount to £nil (2021 - £nil).

### 25 Share capital and controlling parties

The company is limited by guarantee and has no share capital. The liability of its members is limited to £1 per member.

### 26 Related party transactions

#### Transactions with related parties

During the year the charity entered into the following transactions with related parties:

# INSTITUTE FOR JEWISH POLICY RESEARCH

## NOTES TO THE FINANCIAL STATEMENTS (CONTINUED)

FOR THE YEAR ENDED 31 DECEMBER 2022

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### 26 Related party transactions

(Continued)

The following amounts were outstanding at the reporting end date:

	Amounts owed by related parties 2022		Amounts owed by related parties 2021	
	Balance £	Net £	Balance £	Net £
Entities over which the entity has control, joint control or significant influence	16,667	16,667	-	-
	<u>16,667</u>	<u>16,667</u>	<u>-</u>	<u>-</u>

During the period €19,500 was transferred to the Stichting Institute for Jewish Policy Research, an entity registered in the Netherlands under the control of the charity, for working capital purposes. This amount, included within other debtors, is interest free and repayable on demand.

**THE INSTITUTE FOR JEWISH POLICY RESEARCH**

England & Wales - Charity number 252626

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# Accounts

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The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)

Report and Accounts

For the Year Ended 31 December 2021

Charity No. 252626

Company No. 894309 (England and Wales)

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Contents  
for the year ended 31 December 2021**

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**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Legal and Professional Information  
for the year ended 31 December 2021**

**Registered Charity Number**  
252626

**Company Number**  
894309 (England and Wales)

**Governing Document**  
Articles of Association

**President**  
Lord Leigh of Hurley

**Honorary President**  
Lord Rothschild OM

**Honorary Vice Presidents**  
Lord Haskel  
Harold Paisner  
Brian Smouha

**Chairman**  
Stephen Moss CBE

**Treasurer**  
Michael Karp

**Executive Director**  
Dr. Jonathan Boyd

**Director of Operations and Secretary**  
Richard Goldstein

**Senior Research Fellows**  
Dr. David Graham  
Dr. Daniel Staetsky  
Carli Lessof

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Legal and Professional Information**  
**for the year ended 31 December 2021**

**Directors and Board of Management**

William Benjamin	(appointed on 06/07/2020)
Elizabeth Crossick	(appointed on 29/06/2015)
Professor Jonathan Haskel	(appointed on 28/10/2019)
Lord Leigh of Hurley	(appointed on 29/06/2015)
Michael Karp	(appointed on 21/01/2015)
Professor Sergio DellaPergola	(appointed on 28/01/2019 and retired on 04/02/2022)
Miles Webber	(appointed on 17/04/2020)
Hilda Worth	(appointed on 06/07/2020)
Stephen Moss	(appointed on 07/09/2010)

**Registered Office**

6 Greenland Place  
London  
England  
NW1 0AP

**Auditors**

Sobell Rhodes LLP  
Chartered Accountants and Statutory Auditors  
The Kinetic Centre  
Theobald Street  
Elstree  
Borehamwood  
Hertfordshire  
WD6 4PJ

**Bankers**

Barclays Bank plc  
1 Churchill Place  
London  
E14 5HP

**Investment Managers**

Aberdeen Standard Capital  
Minerva House  
29 East Parade  
Leeds  
LS1 5PS

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Chairman's Statement  
for the year ended 31 December 2021**

The Institute for Jewish Policy Research (JPR) is an independent research organisation, consultancy and think tank supporting Jewish communities in the UK and across Europe. It has stood at the forefront of Jewish community research for several decades and provides services and data-driven policy advice to those best placed to positively influence Jewish life.

For Jewish communities to flourish, community leaders and government policymakers need access to independent research to help them make sound, evidence-based policy decisions. At its core, JPR's work is focused on that goal: supplying Jewish charities and foundations with research data and analysis to support their planning; directing key policymakers towards existing research to guide them; and providing research services and policy advice to support organisational needs. In addition, JPR shares its work freely on its website and via online and print media, making it accessible to our target audiences. The Institute works across the Jewish community, from the most strictly Orthodox to the most secular, to enable them to understand their demographics and best serve their needs. With JPR's help, organisations working to support Jewish life can become the best versions of themselves, using our research insights to help them achieve their goals. In this way, JPR seeks to enable multiple forms of Jewishness to flourish, and to reach out to all Jews regardless of their particular beliefs or practices.

As outlined in more detail in the Trustees' Report, JPR made several important breakthroughs in 2021. First, JPR's pioneering work on COVID-19 helped to shape community organisations' response to the crisis in multiple areas. During the year, JPR produced a series of reports based on the July 2020 JPR survey of Jews in the UK, exploring topics such as the effect of Covid on physical and mental health, employment and economic needs, the financial security of individuals and households in different parts of the Jewish sector and Jewish community engagement. JPR also conducted critical work understanding why Jews in the UK were disproportionately affected by the virus in the early days of the pandemic, whether other Jewish communities around the world were similarly impacted, and ultimately making recommendations about how best to minimise the risks. The Institute's groundbreaking research in other areas also continued during 2021, most notably with a major study of Jewish identity across Europe, and the first ever look at Jewish attitudes on climate change.

The process of preparing each report obviously takes time, and the JPR team began work in 2021 on several other studies which are due for publication in 2022. This includes three further papers based on our summer 2021 survey – one examining how the pandemic has impacted people's engagement in Jewish communal life and two investigating how the spring 2021 Gaza conflict affected Jews living in the UK. The team is also preparing for the release of the first data about Jews from the 2021 Census, which is scheduled for late 2022. Preparatory work has also begun on a new synagogue membership survey which we are looking to publish in 2023, and our next national survey of the UK Jewish population, using our highly innovative research panel. Internationally, a considerable amount of energy has been invested in JPR's European Jewish Demography Unit's next country report, looking at the Jews in Belgium. Active data gathering about the demography of Jewish populations in other countries, including Spain and Poland, is also in process, and we are hopeful of launching a further investigation in the Netherlands, in partnership with the community there, in 2023.

JPR's work has had a positive impact on fundraising, with all of JPR's major donors continuing to contribute at least to the same levels as they had previously, and several new foundations to JPR beginning to invest. In particular, JPR's successful work helped to secure a major new multi-year investment starting from January 2022 from the Rothschild Foundation Hanadiv Europe, which has

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Chairman's Statement  
for the year ended 31 December 2021**

given a significant boost in terms of expanding the team, developing our research panel and starting to explore how we can attract major research grants from research councils.

JPR was also delighted to receive new funding from three foundations to significantly enhance our communications work. This is an area JPR has been eager to develop for some time, and the funds are now being used to improve our impact, enhance the JPR brand and hopefully increase income to allow us to develop our programme further.

Throughout 2021 our work continued to be accessed and utilised in the field, both in the UK and across Europe. We presented our work directly to an estimated 1,700 people, at 28 events in 7 cities around the world; our reports were downloaded over 75,000 times and were often front-page news in the Jewish media.

Looking ahead, 2022 should be an exciting year for JPR. As well as the work outlined above, we will continue to develop our UK Jewish research panel (the first of its kind in the Jewish diaspora), bringing in both a new Research Fellow to focus on this work, and a freelance expert data manager to manage some of its more technical aspects. Our new Director of Communications, who joined the team in October 2021, will take charge of building a new organisational website and expanding our social media reach to new and existing audiences. Work will continue on core community statistics in the UK, including a new synagogue membership survey, and we will dedicate considerable time and resource to analysis of 2021 Census data as information is released by the Office for National Statistics. We will look to develop and expand our work in Europe, particularly to support the development of the European Commission programme to combat antisemitism and revitalise Jewish life, and work with community leaders to generate new sources of socio-demographic data to support their planning.

As always, we remain enormously appreciative of the foundations and trusts that make significant contributions to our work and who have continued to stand with us. Once again, Pears Foundation has shown its unwavering commitment to JPR, providing unrestricted funding to support the Institute's infrastructure and increased support for our communications work. Rothschild Foundation Hanadiv Europe has significantly boosted its support in many different areas, creating real opportunities for us to expand and enhance our programme. We are also sincerely grateful, once again, to the Maurice Wohl Charitable Foundation for its renewed support, as well as for the substantial support from the David and Ruth Lewis Family Charitable Trust, the Haskel Family Foundation, the Charles Wolfson Charitable Trust, the Mitchell Charitable Trust and many others. Our gratitude too goes to the Morris Leigh Foundation, which continued its longstanding backing for JPR in 2021 and remains an essential source of support, and to the Jewish Leadership Council, which we hope will become a valuable strategic partner for our work in the UK in the years to come. More widely, we convey our gratitude to all of our supporters whose ongoing donations remain essential to our continued success.

Finally, an essential thank you to two groups of thoughtful and dedicated people. Firstly, to our fantastic trustees, who are devoted to our work and provide us with the imagination and support to look at new ideas and areas for study.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Chairman's Statement  
for the year ended 31 December 2021**

And secondly, my heartfelt appreciation to the magnificent team at JPR for all their hard work and commitment, including our Executive Director, Dr Jonathan Boyd, our research team consisting of Dr Daniel Staetsky, Dr Carli Lessof, Dr David Graham, Brigitta Horup, Dr Keith Kahn-Harris and Isabel Sawkins (who joined us in mid-2022), and our operations team of Richard Goldstein, Omri Gal, Carol Glenn, Judith Russell and Rebecca Frankel. I am sincerely grateful to all of them.



**Stephen Moss CBE  
Chairman**

Date: 27 October 2022

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2021**

The Directors present their Annual Report together with the Audited Financial Statements for the year ended 31 December 2021. The Institute for Jewish Policy Research is a charitable company limited by guarantee under registration number 894309 and is registered by the Charity Commission under registration number 252626. Please refer to pages 1 and 2 for further legal and professional information.

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Institute for Jewish Policy Research (JPR) is a registered charitable company and a company limited by guarantee. JPR is governed by its Articles of Association and by the regulations of the Charity Commission and company law.

JPR's governance structure consists of the Board of Directors and a working group of Honorary Officers (Chair and Treasurer), who oversee management matters. Members of the Board are non-executive Directors and Trustees of the charitable company. They determine the overall direction of JPR, provide leadership and fulfil their fiduciary responsibilities.

Trustees are appointed (or reappointed, as the case may be) for a three-year term of office on the recommendation of the Chairman and require approval by the Board. Under usual circumstances, Trustees can serve a maximum of three consecutive terms of office. An amendment was added to the Articles of Association in 2017, allowing for the possibility of further extensions in special circumstances. This amendment was passed by adopting a Special Resolution at the General Meeting of the Company on October 23rd, 2017. It was determined that any further additional term or terms (of any such length as is determined by the Trustees), would need to be approved at a meeting of the Trustees.

The Trustees must appoint a Chairman from among their number. An amendment was added to the Articles of Association in 2021 to allow the Chairman to serve for three three-year terms, instead of two, and this may be extended by a single year as an emergency measure. The Chairman may only hold office for such time as he or she is a Trustee.

On acceptance to the Board, the Trustees receive the JPR Governance Handbook, which outlines JPR's governance structure and the responsibilities of Board members, and up-to-date documentation on the Institute's aims and programmes.

At all times there must be a President of the Charity, who is appointed by the Trustees. The President may also be a Trustee of the Charity if appointed as such by the Trustees. The President holds office for a three-year term and may be reappointed by the Trustees for any number of further three-year terms as the Trustees see fit.

The Board appoints the Executive Director, who reports to the Board on the substantive areas of the Institute's management. The Board can appoint a Company Secretary who oversees the work in matters of compliance with company and charitable company law. While day-to-day matters are delegated to the staff, all substantive decisions are referred to the Board for approval.

The Board also appoints a Finance Committee which meets regularly during the year to oversee the annual audit, investment strategy and charge-out rate for commissions and to carry out an annual financial review; a Fundraising Committee which sets out and supports the fundraising strategy and monitors its progress during the year and a Nominations Committee to oversee succession planning

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2021**

for the JPR Board and Committees. In addition, the Chairman and the Treasurer both review staff salaries each year and must approve any changes.

The Members of the Board of Directors who served during 2021 are:

Stephen Moss CBE (Chairman)	(appointed 07/09/2010)
Lord Leigh of Hurley (President)	(appointed 29/06/2015)
Michael Karp	(appointed 21/01/2015)
Elizabeth Crossick	(appointed 29/06/2015)
Sergio DellaPergola	(appointed 28/01/2019 and retired 04/02/2022)
Jonathan Haskel	(appointed 28/10/2019)
Miles Webber	(appointed 17/04/2020)
Hilda Worth	(appointed 06/07/2020)
William Benjamin	(appointed 17/04/2020)

After the year-end Professor Sergio DellaPergola retired from the Board. He contributed greatly to the work of the charity and we are delighted that he remains one of JPR's Senior Research Advisers, as well as Chair of the Institute's European Jewish Demography Unit.

JPR also has three Honorary Vice Presidents, who hold a general oversight role as required. They are Lord Haskel, Harold Paisner and Brian Smouha, all of whom previously held senior positions on the Board of Directors.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £216,709 (2020 £218,459). The Chairman reviews the salaries of all employees annually, including the above-mentioned two key management personnel, with reference to their duties and responsibilities, having regard to the resources of JPR and employment legislation.

**OBJECTIVES AND ACTIVITIES**

JPR believes that for Jewish communities to flourish, community leaders and government policymakers need access to independent research to help them make sound, evidence-based policy decisions. The Institute's work is focused on that goal: supplying Jewish charities and foundations with data to support their planning; directing key policymakers towards existing research to guide them; and providing research services and policy advice to support organisational needs. The charity works across the Jewish community, from the most strictly Orthodox to the most secular, to enable them to understand their demographics and best serve their needs. With JPR's help, Jewish organisations can become the best versions of themselves, using our research insights to help them achieve their goals. In this way, we seek to enable multiple forms of Jewishness to flourish, and to reach out to all Jews regardless of their particular beliefs or practices.

JPR's research covers a wide range of issues. At the most fundamental level, it looks at demography: Jewish population sizes, birth and death rates, fertility rates, age distributions and patterns of migration. At the same time, the Institute focuses on specific issues including health and wellbeing, socioeconomics, education, Jewish identity and practice, charitable giving, campus life, antisemitism and attitudes to Israel, shedding light on some of the most pressing issues facing Jews today. Without

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2021**

these statistics as a reference point, organisations are working blind, with no understanding of the changing context in which they function. JPR's data provide essential resources for charities and foundations working across the Jewish world, helping schools, elderly care homes, social welfare charities, Jewish community representative organisations, governmental bodies and NGOs to better understand Jewish communities and plan for their future.

JPR presents its research findings in various settings, such as symposia and seminars aimed at specific groups, strategic planning days involving key communal leaders, training days for staff teams of specific organisations, academic conferences and public events. JPR shares its work on its website and via online and print media, seeking to make it accessible at all times to target audiences and beyond.

### **JPR'S WORK IN 2021**

Continuing on from 2020, COVID-19 remained an important focus of JPR's work in 2021, we analysed the data from JPR's summer 2020 national survey to generate reports on key issues facing Jewish communities in light of the pandemic. In addition, JPR prepared and ran a follow-up survey in summer 2021 – using the JPR research panel for the first time – and actively continued to analyse those data to produce further reports to update community leaders on the impact of the pandemic. In addition, JPR continued to monitor mortality data in the UK and around the world to determine how Jews in different countries were being affected. The charity has shared its work widely with the media and directly with lay and professional leaders at individualised presentations for particular organisations, wider cross-communal events and our own webinars.

JPR also continued to share its work online as much as possible, publishing several articles about the pandemic in the Jewish media in the UK and across the world, and running and participating in numerous events, large and small, to communicate its findings to those best placed to act on them. At the same time as continuing its COVID-related research, JPR carried on working in all of our core areas, publishing groundbreaking work on European Jewish demography, supporting a range of Jewish organisations with their data needs and continuing our community statistics work.

## **1. RESEARCH REPORTS PUBLISHED DURING 2021**

The foundation of JPR's work is its research reports, which are made freely available to download to maximise the scope of the work being accessed and utilised in the field. In 2021 JPR completed eight reports, with several others in the pipeline. In response to the pandemic and drawing on the research the Charity has done, a number of published papers investigated the effects of COVID-19 on Jews in the UK. In addition, JPR's international work continued to support community policy development overseas.

### **1.1. COVID-19 RELATED REPORTS**

#### ***Jewish community income: How is it being affected by the pandemic? (January 2021)***

This paper – the fourth in the series on the impact of the pandemic on the UK Jewish community – draws on the data gathered in JPR's summer 2020 national survey and looks at changing attitudes among Jews towards charitable giving, paying synagogue membership fees and paying the voluntary contribution to Jewish schools in light of the pandemic. Overall, it paints a reasonably optimistic picture – while there is certainly evidence of decline in the number of people contributing to all of these income streams, it also shows that the vast majority have not changed their giving habits and indicates that there has been a shift in favour of giving to Jewish charities over general ones.

***Moving beyond COVID-19: What needs to be done to help preserve and enhance Jewish communal life? (March 2021)***

To bring together the work the Charity has done on the pandemic, JPR published this paper to summarise many of the findings to date and consider their policy implications. The report touches on multiple themes, including the economic needs of disadvantaged households, how best to maintain the Jewish charitable sector, the importance of supporting local synagogue communities and Jewish schools, how to address the potentially harmful effects of the pandemic on the community's informal educational infrastructure, health measures that should be considered to help protect lives, intracommunal relations, and issues around the use of technology to help support and bolster Jewish life. In addition, it considers how the pandemic has impacted data collection work and makes recommendations about the research that needs to be undertaken to support Jewish life going forward. JPR ran an event about the report in May 2021, and it featured at the Jewish Leadership Council's leadership conference in June.

***Jewish employment patterns: How the COVID-19 pandemic is affecting Jewish people's working lives (March 2021)***

The fifth paper in JPR's series examining the effects of the coronavirus pandemic on the UK Jewish population shows that more than one in three (36%) Jews who were working or seeking work just prior to the pandemic had either been made redundant or furloughed, and/or had their pay or hours reduced in the months between February (i.e. pre-pandemic) and July 2020. The paper also showed that those who were most likely to experience this kind of severe work interruption were the youngest workers (aged 16-24), Jewish women (especially regarding furlough and redundancy), single parents, those with household incomes below £30,000 per year prior to the pandemic, and the most religious respondents, especially Strictly Orthodox workers, more than half of whom (52%) were affected.

***Lasting effects: Experiences of COVID-19 and Long COVID symptoms among Jews in the UK (May 2021)***

This paper, the sixth in the series, draws on data JPR gathered in the July 2020 survey to take an early look at how Long COVID was affecting Jews, and to assess infection rates across the Jewish population at that time. It demonstrated that about one in four British Jews believed they had contracted coronavirus by the time the survey took place, much higher than the rates found in wider society, and this rate could be found across all denominational groups with the exception of the strictly Orthodox, where the rate was somewhat higher at about four in ten. Synagogue members were found to be about 50% more likely than non-synagogue members to have contracted the virus, and 80% of all those reporting coronavirus symptoms said they first experienced them in either February or March 2020. About 15% of those who had experienced coronavirus symptoms reported having Long COVID in July 2020 – a similar rate to that found in the general population.

***Did Jews in the UK die disproportionately from COVID-19? (June 2021)***

This study draws on data gathered from Jewish burial societies across the UK to look at mortality rates among Jews throughout the pandemic, up to the end of the second wave. Most importantly, it shows that whereas excess mortality rates among Jews were significantly higher than among the general public during the first wave, they were much the same as general rates – even a little lower – during the second one. It further shows that rates among Orthodox Jews were higher than among Progressive Jews during the first wave (although both were higher than average), whereas they were much the same during the second wave (in fact Progressive rates were marginally higher). The report provides further evidence for the hypothesis that Jews were so badly affected during the first wave because of 'religious (or intra-communal) sociability.' JPR used the report to draw attention to this across the

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community and to encourage community leaders to take a more active responsibility for community public health if and when a similar event occurs in the future.

## **1.2. OTHER UK REPORTS**

### ***Climate change: What do Jews in the UK think? (October 2021)***

Beyond the pandemic, JPR also used the panel survey in summer 2021 to test out the gathering of data on a range of social and political issues and published its first report using these data on climate change. This was timed to be released at the beginning of the COP26 climate conference in Glasgow. Monitoring social and political attitudes is important for various aspects of community planning and also helps to determine certain consequences of demographic change. The report found that British Jews were somewhat more conscious than the general population of the UK about climate issues, but that significant differences could be determined by denominational affiliation, with progressive synagogue members far more climate aware than the strictly Orthodox.

### ***Numbers of Jewish children in Jewish schools: Statistical bulletin for 2018/19 to 2020/21 (December 2021)***

This bulletin showing the number of Jewish children in Jewish schools from 2018 to 2021 disclosed that while the overall number of Jewish pupils in Jewish schools continues to grow, the growth rates have slowed down in recent years, mainly in the mainstream sector, although they have declined in the Orthodox sector as well.

## **1.3. INTERNATIONAL REPORTS**

### ***The Jewish identities of European Jews: What, why and how (December 2021)***

This detailed and comprehensive report explores the nature of contemporary Jewish identity in Europe today, based on the data we gathered for the European Union Agency for Fundamental Rights (FRA) in 2018 – the largest dataset ever built on Jews across Europe. Written by leading Jewish demographers Professor Sergio DellaPergola and Dr Daniel Staetsky, the Chair and Director of JPR's European Jewish Demography Unit respectively, it covers Jews living in twelve different countries – Austria, Belgium, Denmark, France, Germany, Hungary, Italy, the Netherlands, Poland, Spain, Sweden and the UK – and explores their Jewishness in multiple ways, both as a collective living in Europe, and in each individual place. It seeks to provide insights on several important questions, including whether Jews see themselves more as a religion or an ethnicity, how attached they feel variously to the countries in which they live, to Israel and to the European Union, how they understand and live their Jewishness and how this differs when examined by age band and denomination. Further work on the data is planned for 2022.

## **1.4. COMMISSIONED STUDIES FOR CLIENTS**

Despite its continuing focus on COVID-19 research throughout 2021, JPR continued to serve the Jewish community by providing commissioned research for a number of clients:

### **European Jewish Association**

The European Jewish Association, a political advocacy organisation with an Orthodox Jewish leaning, based in Brussels, commissioned JPR to create an index to measure how different European countries are faring with regard to major Jewish concerns. The project involved identifying particular variables that are measurable and by which an assessment could be made – for example, whether the government has established a formal governmental position to combat antisemitism, whether it has adopted the IHRA definition of antisemitism, whether it permits *shechita* or *brit milah*, or whether it includes the Holocaust or Judaism as part of its national curriculum, etc. The project did not involve

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data gathering work itself but rather designing the component parts of what such an index might include.

**University of Manchester**

JPR provided commissioned academic support and advice to the research team at Manchester University for its 'Evidence for Equality National Survey' (EVENS) – a national survey designed to gather information about inequality among ethnic minorities. JPR's input was specifically designed to help them gather data on Jews and advice on how to analyse them.

**Industrial Dwellings Society**

In 2021, JPR completed the first of two commissioned reports for the Industrial Dwellings Society – a Jewish housing association working to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services. For both reports, JPR mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of certain areas to support IDS planning work.

**Jewish Blind & Disabled**

The study for Jewish Blind and Disabled (JBD) looked at the sociodemographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of the organisation's strategic review.

**JW3**

JPR has a small multi-year project with JW3 to help its team to monitor and evaluate the effectiveness of their work. This commissioned project involves helping JW3 to determine what it needs to measure in view of its new strategic plan, advising their staff on how best to gather the required data, and then working with them to determine how best to use those data for their purposes. As part of the project in 2021, JPR presented the key findings from our July survey to the JW3 team at a staff planning day.

**1.5. RESEARCH REPORTS IN DEVELOPMENT DURING 2021**

The process of preparing each report obviously takes time, and work began in 2021 on a number of other publications that we expect to publish in 2022. Two further papers based on JPR's summer 2021 survey were in development in 2021 – one examining how the pandemic has impacted people's engagement in Jewish communal life, with particular focus on the effects of online activities, and another investigating the impact of the Gaza conflict in the spring of 2021 on British Jews. JPR is also preparing for the release of the first data about Jews from the 2021 Census, which is scheduled for autumn 2022, and has begun the process of drafting a short report which takes an initial look at the findings. Preparatory work has also begun on a new synagogue membership survey, the findings from which the Institute is looking to publish in 2023.

Internationally, a considerable amount of energy has been invested in JPR's next country report, looking at the demography of Jews in Belgium. Other reports, on the demography of Jews in Spain, Portugal, Poland and the Netherlands are also planned or in process.

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**2. PRESENTATIONS, DOWNLOADS AND ACTIVE USE OF JPR RESEARCH DATA AND FINDINGS**

In 2021, JPR presented its work directly to an estimated 1,700 people, at 28 events in seven cities around the world. Among the events during 2021 were the following:

Date	Client	Detail
January	JW3	Presentation of JPR's work on the pandemic to the JW3 professional team and trustees, as part of the organisation's strategic planning work.
	Jewish Leadership Council	Presentation of JPR's work on the pandemic to the JLC members, to support the community response to emerging challenges.
	JPR public webinar	Public presentation of key findings from the JPR report, <i>Jews in Europe at the turn of the Millennium: Population trends and estimates</i> .
February	Organization for Security and Cooperation in Europe (OSCE)	Presentation on how to research antisemitism, making recommendations about how to create a more harmonised multi-national approach.
	Board of Deputies of British Jews	Presentation about Jewish mortality rates, at a public panel event with Dr Charlotte Benjamin, Professor David Katz and Moishe Sinitsky.
	Southend & Westcliff Hebrew Congregation	Presentation on Jewish health and mortality patterns as part of the synagogue's adult education programme.
March	JPR public webinar	Presentation and discussion of the JPR report, <i>Social research on European Jewish populations: The state of the field</i> aimed at researchers and community leaders across Europe.
	London School of Jewish Studies	Presentation of JPR's work on the pandemic to the LSJS professional team, as part of the school's professional development programme.
	School of Oriental and African Studies (SOAS)	Presentations about our research on Jews and coronavirus, alongside Dr Michael Marks and Eli Spitzer.
	Board of Deputies of British Jews	Presentation of research data and thinking on how and when to gather data on Jews by religion and/or ethnicity.
	Edgware United Synagogue	Presentation about the importance of the UK Census, and how census data are used to support community planning (simultaneously broadcast across the United Synagogue).
	Hampstead Garden Suburb Synagogue	Presentation about the importance of the UK Census, and how census data are used to support community planning.
	North Western Reform Synagogue	Presentation about the importance of the UK Census, and how census data are used to support community planning.
	Board of Deputies of British Jews	Presentation and panel discussion about the importance of the UK Census, and how census data are used to support community planning, with Peter Benton from the Office for National Statistics.
	United Nations	Presentation at conference on combating

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		antisemitism, about what research data tell us about how best to combat it (convened by UN High Representative for the Alliance of Civilisations and former Spanish Minister of Foreign Affairs, Miguel Moratinos).
May	JPR webinar	JPR public webinar which presented and discussed some of the key data we have published about the pandemic.
	Western Marble Arch Synagogue	Presentation about the nature of contemporary Jewish identity at a pre-Shavuot event.
	Dutch Jewish Humanitarian Fund	Presentation to trustees looking at key social and demographic trends among Jews across Europe, to help the Fund's strategic planning work.
June	Jewish Leadership Council	Presentation and discussion of some of the data JPR has published about the effects of the pandemic on the community for the JLC community trustees conference.
	European Network of Small Jewish Communities	Presentation on the impact of coronavirus on European Jewish communities.
July	Woolf Institute, Cambridge	Lecture on ' <i>Why Jews live longer than non-Jews: what the latest health crisis can teach us about Jewish longevity</i> ' as part of the Institute's Religion in Numbers seminar.
Sept	JPR House of Lords lunch	JPR event outlining JPR's work over the course of the pandemic, attended by community leaders, JPR donors and politicians/civil servants.
Nov	Office for National Statistics	Inter-faith panel discussion looking at the relationship between belief and statistics and how faith motivates JPR's work.
	Natan Fund	Presentation to trustees about key trends in the UK Jewish population and community as part of the Fund's mission to the UK.
	United Nations	Presentation at closed consultation on antisemitism with UN Special Rapporteur on Freedom of Religion or Belief, Dr Ahmed Shaheed.
	Russian Jewish Congress	Presentation on challenges in understanding antisemitism data at the 'Protecting the Future' conference in Moscow.
Dec	Jewish Community Academy Trust	Presentation to the Office of the Chief Rabbi and the United Synagogue of key trends and issues in Jewish schools in the UK as part of JCAT's strategic planning work.

In addition to the above-mentioned reports and presentations, JPR Executive Director, Dr Jonathan Boyd, has a monthly column in *The Jewish Chronicle* in which he uses data generated by JPR and other agencies to share his reflections about contemporary Jewish life on a wide range of topical issues. JPR's research is also regularly featured in Jewish media, including *The Jewish Chronicle*, *Jewish News*, *The Times of Israel*, *Haaretz*, *JTA* and *J-Wire*.

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In 2021, JPR reports were downloaded 75,900 times and JPR's e-newsletters reached close to 5,000 people every edition, with an opening rate of over 30%.

### **3. OTHER INITIATIVES AND DEVELOPMENTS**

#### **Communications**

With thanks to support from three key foundations, JPR recruited its first Director of Communications in October 2021. The priorities for the first year of the position are (i) to communicate JPR's research outputs to the media and key target audiences; (ii) to redesign the JPR website; and (iii) to build JPR's social media presence. Work began on all three of these areas in the last quarter of 2021.

#### **JPR in Europe**

During 2021, JPR moved forward with establishing a foundation (*Stichting*) in the Netherlands to help manage aspects of its work within the European Union. Whilst technically independent, the *Stichting* is controlled by JPR as a 'special trust' (as defined for the purposes of charities accounting) in the UK. This will enable JPR to file consolidated accounts for both JPR and the new *Stichting* with Companies House in the UK. By the end of 2021, the Deed of Incorporation had been approved and the *Stichting Institute for Jewish Policy Research* was formally registered at the Dutch Chamber of Commerce (KVK). In the first months of 2022, the Dutch Tax Authority (Belastingdienst) awarded the *Stichting* ANBI (non-profit tax designation) status and a bank account was set up with ABN-Amro.

#### **European Jewish Research Archive (EJRA)**

Work progressed on JPR's European Jewish Research Archive (EJRA), a publicly available online archive for research publications on contemporary European communities. The archive includes items that draw on, or discuss, social research on European Jewish communities since 1990. In 2021, the archive had 19,977 unique visitors to the site (a 69% increase on 2020), who spent 22,500 unique sessions on the site (a 60% increase on 2020) and produced nearly 31,963 page views (a 25% increase on 2020). The archive now contains over 4,000 items in 29 languages covering 54 countries.

#### **Office move**

JPR moved into new offices in Camden Town in 2021 after being compelled to leave ORT House due to ORT's plans to redevelop the site. The new office is fully functional, although staff are working there somewhat sporadically. In an ideal world, JPR hopes to be able to return to something approaching normal working patterns during the course of 2022.

### **PUBLIC BENEFIT**

The Institute for Jewish Policy Research is an independent research institute that which conducts and disseminates research on contemporary Jewish communities. JPR's research is policy-oriented; it collects and analyses data and makes them available to policymakers, service providers and the general public through online and print publishing.

The Directors, having carefully considered the Charity Commission's guidance on public benefit, have concluded that:

JPR's aims and activities give clearly identifiable benefits to the public and continue to be charitable. The work particularly benefits the Jewish voluntary sector in the United Kingdom and elsewhere in

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Europe. Through its pioneering social research, JPR also makes contributions to the wider voluntary sector, by sharing its knowledge and scholarship, thereby benefiting wider society. The benefits are not unreasonably restricted in any way.

## **PERFORMANCE**

JPR made several important breakthroughs in 2021. First, our work on COVID-19 helped to inform thinking and planning across the community at a time when many aspects of Jewish communal were restricted and many charities needed data to guide their responses to the pandemic. Second, our work helped to build the Institute's profile in the community – community leaders valued JPR's research carried out on the pandemic as JPR was the only Jewish organisation systematically analysing its effects on British Jews in an academically credible way. Third, that work also had an impact on fundraising – all of our major donors continued to contribute at least to the same levels as they had been previously, and in some cases more, and we attracted several new foundations to JPR during the year. The work also helped to secure a major new multi-year investment from the Rothschild Foundation Hanadiv Europe, which has given JPR a significant boost in terms of expanding the team, developing the research panel and starting to explore how we can attract major research grants from research councils. Fourth, JPR was delighted to receive new funding for its communications work. This is an area that the Institute has been eager to develop for some time, and the funds will help JPR to make progress in ways that should improve its impact, enhance the JPR brand and hopefully increase income to allow it to achieve even more.

As always, a major measure of JPR's effectiveness is shown by how many Jewish community leaders and organisations use its research to inform their policy decisions. The JPR outputs shown above indicate how often the Institute's various reports both on the impact of the pandemic and other issues were downloaded, and how often JPR was invited to present the data to organisations, not just throughout the UK but internationally too. By this measure, once again, this has been a successful year for JPR.

Overall, 2021 was an outstanding year for JPR, especially in the context of what was going on around the world. Once again, the JPR team continued to be incredibly productive whilst working mostly from home, income held at a stable level and our work was utilised widely, as community leaders sought to understand the effects of the pandemic.

It appears that 2022 will be another significant year for JPR. As outlined below, the Institute intends to further develop its research panel, deliver another community-wide survey, begin to analyse data from the 2021 National Census, and build an exciting new website and social media programme in order to enhance our outreach and make our data even more accessible. It is an exciting and much needed programme that is backed by solid fundraising plans and significant reserves.

## **LOOKING AHEAD**

Following another year of focused work providing the Jewish community with data to plan its way through the instability of the coronavirus pandemic, JPR has a compelling list of projects to look forward to in 2022.

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**Continuing to develop our UK Jewish population research panel**

JPR's research panel is designed to significantly enhance our capacity to gather attitudinal data about British Jews, reduce the costs of doing so, and provide a data-gathering service for Jewish charities, trusts and foundations to help them better understand Jewish public opinion. Infrastructural work on the panel over the course of 2022 will focus on two main areas: (i) adding capacity to the JPR research team to improve our ability to manage and process large quantities of data. Much of this is being directly funded by a new grant from the Rothschild Foundation; and (ii) digital marketing to accompany a national survey that will gather new data on aspects of Jewish identity (as well as mental health, employment and a number of other social and political issues), and help recruit more people to the panel, with a particular emphasis on reaching two difficult-to-reach subgroups – young people (aged 16-40) and the communally unaffiliated.

In terms of research outputs from the panel work, we will be publishing new reports on how the pandemic has impacted levels of engagement in Jewish life (with a particular focus on the effects of online technology) and how British Jews were affected by the Gaza conflict in May 2021. Also on the agenda is preparatory work for a possible second National Jewish Student Survey which is on our radar screen for 2023 or 2024.

**Securing and enhancing our work on core UK community statistics**

This work, which includes measuring births, deaths, marriages and divorce rates, as well as Jewish school enrolment and synagogue membership, is fundamental to understanding the basics of British Jewish life and feeds into all of our demographic work in multiple ways. In spite of its importance to the community, JPR no longer receives any direct communal funding for this work whatsoever – it was supported by the Board of Deputies of British Jews until 2018, but it has withdrawn its support in recent years. Nevertheless, despite the lack of external funding for this research and following considerable development work in 2021, JPR will be launching a new synagogue membership survey in 2022 at our own expense due to the importance of this work. It will be the first such study since 2016, and will both measure affiliation rates and feed into our methodological work on the research panel. In addition, JPR hopes to continue to work on births and deaths data and Jewish school enrolment rates, although due to the lack of communal funding, it is likely that we will only have capacity to utilise these data for JPR's internal purposes; insufficient investment limits our capacity to publish and share these findings more widely. We were looking to expand the reach of this type of work into new areas – notably, community income, employment rates and accurate temporal analysis of antisemitic incidents – so that we generate much more accurate assessments of how these aspects of Jewish life are changing over time, but such work is unlikely in 2022 and 2023 due to the lack of communal investment.

**Beginning to analyse 2021 Census data**

The first output based on 2021 Census religion data is expected to be released by the Office for National Statistics in autumn 2022, followed by further data tables over the rest of the year and throughout 2023. JPR is preparing to produce an initial short report upon release of the first data, which will look at Jewish population size at the national level and by geographical area. Other reports are expected to follow as and when further data are released – in particular, we expect to publish on the age structure of the Jewish population, how it has changed since 2011, and what the implications are for population projections going forward. JPR also expects to use the data to begin presenting the findings to community leaders and to support various projects commissioned by community organisations that are keen to understand demographic issues relevant to their own planning.

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**Continuing to support Jewish communities across Europe**

As previously mentioned, JPR has published a new study about the Jewish identities of Jews in Europe and will be working over the course of 2022 to produce a series of by-products based on that report (mini-reports, events, short articles, etc.) that are designed to engage community leaders, policymakers and practitioners in some of the key issues it raises. JPR is also working on several country reports, notably an in-depth demographic study about the Jewish population of Belgium, alongside further demographic work on Spain, Portugal and Poland. This is part of the Institute's European Jewish Demography programme, which aims to provide key demographic information to community leaders across the continent. In order to sustain this work at the same level going forward, JPR needs to find supplementary sources of funding, so will be seeking to raise funds more actively from European foundations to help cover these costs.

**Work with the European Commission**

In the first half of 2022, JPR researchers signed a contract with the European Commission to map the current research infrastructure on antisemitism in Europe. This project is among the first initiatives of the Commission's recently published strategy on combating antisemitism and revitalising Jewish life, which includes establishing a 'research hub' to help finance research projects on these issues and cultivate the research field of contemporary European Jewry.

**Measuring levels of anti-Jewish and anti-Israel sentiment in Great Britain**

JPR is still hoping to run a follow-up to its 2017 study of the attitudes of the general population of Great Britain towards Jews and Israel, to track change over time. The project was delayed due to the pandemic – face-to-face interviews were not possible – but subject to funding, JPR is looking to activate the study either in 2022 or 2023.

**Continuing to maintain our archive of research on contemporary European Jewish life**

JPR started building our European Jewish Research Archive in 2014 with the support of the Rothschild Foundation Hanadiv Europe. It has involved collecting and digitising thousands of reports and building the technological infrastructure to make the archive accessible and searchable. New funding from the Rothschild Institute Hanadiv Europe for the 2022-25 period will help to continue JPR's work on it.

**A new JPR website and social media programme**

As mentioned earlier, JPR will be rebuilding the JPR website from the ground up in 2022 – work began actively in March and is expected to be completed in the autumn. JPR is working towards a complete re-think of the site, designed very much with user experience and user journeys in mind, and with different types of content available to help engage new and existing audiences in our research findings and their implications. The site will also have a new and improved content management system, which will make it much easier to manage and maintain. We will also be working much more actively on social media platforms in an attempt to significantly expand our reach and engage new audiences.

**Monitoring, evaluation and learning**

JPR continues to work in this area and is particularly focusing on supporting community organisations to better self-evaluate, by ensuring that they are gathering the right data in the right ways to be able to make their own assessments of their effectiveness. This is an area the Institute is keen to cultivate, but in order that we can expand into this space meaningfully, the work will need to be funded properly and directly.

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**RISK ASSESSMENT**

Risk management is reviewed regularly by staff and a Risk Register is submitted to the Board for approval on an annual basis. The Directors have identified the main risks to which the charitable company is exposed and have taken steps to mitigate them.

**FINANCIAL REVIEW FOR THE YEAR**

The Chairman's Statement on pages 3-4 provides a summary of activities during the year. The results for the year are shown in the Statement of Financial Activities on page 24.

JPR's income continues to come from four main sources: the MCA Endowment; grants from foundations; commissioned work and donations.

The value of the endowment fund recovered to £2,932,300 at the end of 2021. This marks an increase from the start of the year of 7.30% (£2,751,597). The income attained from the fund's investment was £100,000, as budgeted in advance by the Trustees.

The fund's investment manager noted that the overall objectives of the endowment were met in 2021, with good progress on capital growth and the income target was met for the year. During the year the endowment increased in capital value from £2.75 million to £2.9 million, making strong progress against the mid-term target of returning the value to over £3 million. This growth was driven by a strong year for equity markets, with vaccine rollouts being largely successful at curtailing the worst effects of COVID-19, combined with an accommodative economic outlook with supportive interest rates and expected levels of government spending. This outlook deteriorated towards the end of the year with supply chain problems and rising inflation starting to impact economic and company projections.

Income paid away during the year met with the endowment's target of £100,000, with income generated in excess of this being carried into 2022. The total income carried forward into 2022 was slightly lower than that of 2021 with income generated in the year totalling just over £98,000. Dividends from equities continued to recover during the year from the lows of the COVID-19 pandemic, with notable examples being Rio Tinto and BHP. These companies were the largest contributors of the year, making up over £16,000 of the total generated due to a strong recovery in economic activity, combined with supply disruption, boosting commodity prices. Bond yields rose significantly over the year despite persistent messages from central banks pointing to lower for longer rates. The fund continued to hold a proportionally lower allocation than the benchmark due to a challenging outlook for the asset class and still relatively low income generation. Instead, the fund held more alternatives such as renewable energy and social infrastructure to both generate income but also diversify the return profile of the portfolio.

The outlook into 2022 looks more challenged than that of 2021 with rising inflation leading to the prospect of the first material interest rate hikes in the UK since the 2008 financial crisis. While the world and global economy continue to recover from the pandemic it remains to be seen how long supply chain disruptions last and the impact this will have on companies. The fund's strategic approach focuses on investments that have pricing power, i.e. more resilient revenue growth in an inflationary environment. Considering this outlook, more cyclical stocks have been added to the portfolio that are also underpinned by structural growth and as well as continuing to diversify with additional

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alternatives. In this scenario it is likely that income generation can continue to meet JPR's objectives, however capital growth may be more challenged in the short term with increased volatility likely.

In 2021, JPR secured a total of £582,397 in unrestricted donations, up from £523,122 in 2020. This included the Pears Foundation £75,000, the third of three £75,000 annual grants from the Maurice Wohl Charitable Foundation, as well as a new grant of £40,000 from the Haskel Family Foundation. In addition, the Lewis Family Charitable Trust and the Charles Wolfson Charitable Trust repeated their sizeable donations again in 2021. We also received new and very welcome donations from the Bloom and Kirsch Foundations. Income from commissioned work brought in £291,631 in 2021. This was an increase from 2020 of £246,625.

With the securing of existing large donors as well as welcoming other new large donors, the financial outlook for JPR in 2022 looks encouraging. Together with the work achieved in 2021 and new, exciting projects to look to in 2022, the fundraising sub-committee, chaired by JPR Chairman Stephen Moss CBE, has excellent material upon which to build and deliver fundraising activities. This, alongside JPR's strong financial reserves, points to a bright future for JPR.

#### **PERMANENT ENDOWMENT INVESTED IN TOTAL RETURN BASIS**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the preparation and production of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe, together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of the said purposes. The income of the Fund may be spent by the Charity on a year-to-year basis, as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000, converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

In order for capital to be spent, it is necessary to satisfy two conditions:

1. The total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.
2. Thirty days before the trustees resolve to spend the capital, the market value of the Fund must be not less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward the unspent part of such 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The fund is invested in a discretionary agreement with abdrn (formerly Aberdeen Standard Capital). Charlie Thompson and Rob Richardson took over as account managers in July 2019 and work together to maximise the long-term return whilst providing a good level of income as agreed with the Board. Charlie has 18 years of investment experience, is a Chartered Wealth Manager and is a Fellow of the Chartered Institute for Securities and Investment. Rob has six years of investment experience, is an IMC holder and an Associate Member of the Chartered Institute for Securities and Investment.

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(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2021**

The Board has adopted an ethical policy for the investment of these funds, namely, not to invest in any companies involved in the manufacture and distribution of tobacco and arms or any companies that boycott Israel.

**RESERVES POLICY**

JPR's reserves policy is to seek to hold three to six months of overheads. This would amount to between £212,987 and £425,974. As of 31 December 2021, there was a surplus of unrestricted funds of £376,684 which is in line with the target range as set out above.

JPR has adopted this policy to cover for the risk of any unforeseen emergencies, such as unexpected IT costs or day-to-day operational costs, such as employing temporary staff to cover sickness absence during major projects. The reserves policy will also cover any fluctuations in income, such as late payments for commissioned work or large grants being delayed or not renewed. The reserves will ensure any expenditure is covered on preparatory work on projects, as well as any necessary organisational development costs not covered by income.

The policy of holding three to six months' reserves will enable JPR to develop new sources of finance or cut back on expenditure should an emergency arise. In the meantime, such a prudent policy provides a stable base for JPR's research and the dissemination of the results to assist Jewish communities in the UK and continental Europe.

**STATEMENT OF DIRECTORS' RESPONSIBILITIES**

The Directors are responsible for preparing the Directors' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (the United Kingdom Generally Accepted Accounting Practice).

Company law requires the Directors 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 the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and 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;
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that 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 and Charities Act 2011. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2021**

Insofar as the Directors are aware:

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

The Directors 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.

**Auditors**

In accordance with Section 485 of the Companies Act 2006, a resolution proposing that Sobell Rhodes LLP (formerly Martin May) be reappointed as auditors of the company will be put to the Annual General Meeting.

By Order of the Board



**Stephen Moss CBE  
Chairman**

Date: 27 OCTOBER 2022

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditors' Report  
for the year ended 31 December 2021**

**Opinion**

We have audited the financial statements of The Institute for Jewish Policy Research (the 'charity') for the year ended 31 December 2021 which comprise the statement of financial activities, the balance sheet, the statement of cash flows and notes to the financial statements, including significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including FRS 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

In our opinion the financial statements:

- give a true and fair view of the state of the charity's affairs as at 31 December 2021 and of its incoming resources and application of resources 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 Financial Reporting Council's (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 trustees with respect to going concern are described in the relevant sections of this report.

**Other information**

The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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. 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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditors' Report  
for the year ended 31 December 2021**

**Matters on which we are required to report by exception**

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
- we have not received all the information and explanations we require for our audit.

**Responsibilities of trustees**

As explained more fully in the trustees' responsibilities statement, the trustees 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 the trustees 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 limited liability partnership or to cease operations, or have no realistic alternative but to do so.

**Auditor's 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, is detailed below.

We enquired of management to obtain an understanding of the legal and regulatory frameworks that are applicable to the charity. The most significant that are relevant to the charity are the United Kingdom Generally Accepted Accounting Practices, the Companies Act 2006 and the Charities Statement of Recommended Practice (SORP) and the tax legislation in respect of Corporation tax, VAT and PAYE. We understood how the charity complies with these through enquiries of management and asked of any instances of non-compliance in these areas.

We assessed the susceptibility of the charity's financial statements to material misstatements, including how fraud might occur through enquiries of management and to understand where they considered there was susceptibility to fraud. We obtained an understanding of the controls that the charity has established to address the risk that prevents, deters, and detects fraud.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Independent Auditors' Report  
for the year ended 31 December 2021**

Based on this understanding, we designed our audit procedures to detect irregularities including fraud which primarily consisted of the following:

1. Identifying and testing of journal entries including large and unusual transactions to understand their rationale.
2. Enquiries of management and those charged with governance on instances of any known fraud and around actual and potential litigation claims.
3. Enquiries of the tax engagement team that are independent of the audit team for instances of non-compliance.

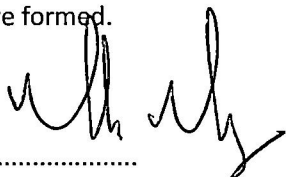
The Senior Statutory Auditor reviewed the experience and expertise of the audit engagement team to ensure that they had the appropriate competence and capabilities to identify any instances of fraud and non-compliance with the relevant laws and regulations.

The objective of our audit, in respect of fraud, are: to identify and assess the risks of material misstatement of the financial statements due to fraud; to obtain sufficient appropriate audit evidence regarding the assessed risk of material misstatement due to fraud, through designing and implementing appropriate responses; and to respond appropriately to fraud or suspected fraud identified during the audit. However, the primary responsibility for the prevention and detection of fraud rests with both those charged with governance of the entity and management.

A further description of our responsibilities is available on the FRC's website at:  
<https://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 charity's trustees, as a body, in accordance with Part 4 Charities (Accounts and Reports) Regulations 2008. Our audit work has been undertaken so that we might state to the charity's trustees 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 trustees as a body, for our audit work, for this report, or for the opinions we have formed.



.....  
Martin May BA FCA (Senior Statutory Auditor )

For and on behalf of Sobell Rhodes LLP

Statutory Auditor

The Kinetic Centre

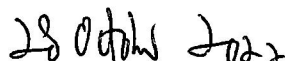
Theobald Street

Borehamwood ,

Elstree

Hertfordshire

WD6 4PJ



**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Statement Of Financial Activities  
Including Income And Expenditure Account  
for the year ended 31 December 2021**


	Note	Unrestricted Funds £	Restricted Funds £	Permanent Endowment Fund £	Total Funds 2021 £	Total Funds 2020 £
<b>Incoming and endowments from:</b>						
Donations and legacies	2	195,530	-	-	195,530	260,906
Investments	3	100,032	-	-	100,032	110,681
Charitable activities	4	286,835	297,555	-	584,390	522,831
<b>Total income and endowments</b>		<u>582,397</u>	<u>297,555</u>	<u>-</u>	<u>879,952</u>	<u>894,418</u>
<b>Expenditure on:</b>						
Raising funds		99,792	-	-	99,792	106,905
Charitable activities		502,221	222,867	20,211	745,299	732,490
<b>Total expenditure</b>	5	<u>602,013</u>	<u>222,867</u>	<u>20,211</u>	<u>845,091</u>	<u>839,395</u>
Investment return: net of realised and unrealised (gains)/losses	14	-	-	202,612	202,612	(28,953)
<b>Net income/(expenditure)</b>	8	(19,616)	74,688	182,401	237,473	26,070
Transfer between funds	19	(34,044)	34,044	-	-	-
<b>Net movement in funds</b>		<u>(53,660)</u>	<u>108,732</u>	<u>182,401</u>	<u>237,473</u>	<u>26,070</u>
<b>Reconciliation of funds:</b>						
Total funds brought forward		430,344	-	2,675,875	3,106,219	3,080,149
<b>Total funds carried forward</b>	20	<u>376,684</u>	<u>108,732</u>	<u>2,858,276</u>	<u>3,343,692</u>	<u>3,106,219</u>

All of the above results are derived from continuing activities. All gains and losses recognised in the year are included above.

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Balance Sheet**  
**Company Number: 894309 (England and Wales)**  
**as at 31 December 2021**

	Notes	2021		2020	
		£	£	£	£
<b>Fixed assets</b>					
Intangible assets	12		4,980		5,810
Tangible assets	13		101,800		20,469
Investments	14		2,932,100		2,751,598
			<u>3,038,880</u>		<u>2,777,877</u>
<b>Current assets</b>					
Debtors	15	36,055		58,783	
Cash at bank and in hand		<u>330,521</u>		<u>342,108</u>	
		<u>366,576</u>		<u>400,891</u>	
<b>Creditors: amounts falling due within one year</b>					
	16	(61,764)		(72,549)	
<b>Net current assets</b>			<u>304,812</u>		<u>328,342</u>
<b>Net assets</b>	20		<u>3,343,692</u>		<u>3,106,219</u>
<b>Funds</b>					
General funds			226,684		280,344
Designated funds			150,000		150,000
Total unrestricted funds	17		<u>376,684</u>		<u>430,344</u>
Permanent endowment funds	18		2,858,276		2,675,875
Restricted funds	19		108,732		-
<b>Total funds</b>	20		<u>3,343,692</u>		<u>3,106,219</u>

These financial statements were approved by the Board of directors on <sup>27</sup>October 2022 and signed on its behalf by:

  
 Stephen Moss CBE  
 Chairman

  
 Michael Karp  
 Treasurer

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Statement of Cash Flow**  
**as at 31 December 2021**

	Note	2021 £	2020 £
<b>Net cash flow from operating activities</b>	21	<u>(37,990)</u>	<u>(108,160)</u>
<b>Cash flow from investing activities:</b>			
Payments to acquire tangible fixed assets		(93,808)	(19,796)
Income from investments		100,000	100,000
Payment of investment manager's fees		20,211	22,928
<b>Net cash flow from investing activities</b>		<u>26,403</u>	<u>103,132</u>
<b>Net increase / (decrease) in cash and cash equivalents</b>		(11,587)	(5,028)
<b>Cash and cash equivalents at 1 January</b>		342,108	347,136
<b>Cash and cash equivalents at 31 December</b>		<u>330,521</u>	<u>342,108</u>
<b>Cash and cash equivalents consists of:</b>			
Cash at bank and in hand		330,521	342,108
<b>Cash and cash equivalents at 31 December</b>		<u>330,521</u>	<u>342,108</u>

As there are no debts, the analysis of changes in net debts disclosure is not required.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

**1 Summary of significant accounting policies**

***General information and basis of preparation***

The Institute for Jewish Policy Research is a private company limited by guarantee registered in England and Wales. In the event of the Charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the Charity. The address of the registered office is given in the Charity Information on page 1 of these financial statements. The nature of the charity's operations and principal activities are noted in the Report of the Directors.

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, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the Charity and rounded to the nearest £1.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

***Funds***

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the Charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of the designated funds are set out in the notes to the financial statements.

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.

Permanent endowment funds represent those assets which must be held permanently by the charity, principally comprising of investments. Income arising on the permanent endowment funds can be used in accordance with the objects of the Charity and is included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund. Investment management charges and legal advice relating to the fund are charged against the fund.

***Income recognition***

All incoming resources are included in the Statement of Financial Activities (SoFA) when the Charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the Charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the Charity and it is probable that they will be fulfilled.

**1 Summary of significant accounting policies** (continued)

For legacies, entitlement is the earlier of the charity being notified of an impending distribution or the legacy being received. At this point income is recognised. On occasion legacies will be notified to the charity however it is not possible to measure the amount expected to be distributed. On these occasions, the legacy is treated as a contingent asset and disclosed.

Income from performance related grants are recognised at fair value when the Charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Investment income is earned through holding assets for investment purposes such as shares and property. It includes dividends and interest. It is included when the amount can be measured reliably. Interest income is recognised using the effective interest method and dividends are recognised as the charity's right to receive payment is established.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

**Expenditure recognition**

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings. Note 5 should be referred to for details of the nature and cost involved:

- Costs of raising funds
- Expenditure on charitable activities
- Other expenditure represents those items not falling into the categories above.

Support costs are those that assist the work of the Charity but do not directly represent charitable activities and include office costs, governance costs and administrative payroll costs. They are incurred directly in support of expenditure on the objects of the charity. Where support costs cannot be directly attributed to particular headings they have been allocated to costs of raising funds and expenditure on charitable activities on a basis consistent with use of the resources. Support costs detailed under note 5 are allocated on the basis apportionment of the time spent on these activities.

Costs of raising funds are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities.

The analysis of these costs is included in note 5.

**Intangible assets**

Intangible fixed assets are measured at cost less accumulative amortisation and any accumulative impairment losses. Trade marks are written off over their useful life.

**Depreciation**

Tangible fixed assets are stated at cost (or deemed cost) or valuation less accumulated depreciation and accumulated impairment losses. Cost includes costs directly attributable to making the asset capable of operating as intended.

The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021

1 Summary of significant accounting policies (continued)

Depreciation is provided on all tangible fixed assets, at rates calculated to write off the cost, less estimated residual value, of each asset on a systematic basis over its expected useful life as follows:

Leasehold improvements	over the term of the lease
Fixtures and equipment	25% straight line
Computers	33.33% straight line

**Investments**

Investments are recognised initially at fair value which is normally the transaction price including transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains / (losses) on investments' in the SoFA if the shares are publicly traded or their fair value can otherwise be measured reliably. Other investments are measured at cost less impairment.

**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.

**Impairment**

Assets not measured at fair value are reviewed for any indication that the asset may be impaired at each balance sheet date. If such indication exists, the recoverable amount of the asset, or the asset's cash generating unit, is estimated and compared to the carrying amount. Where the carrying amount exceeds its recoverable amount, an impairment loss is recognised in the SoFA unless the asset is carried at a revalued amount where the impairment loss is a revaluation decrease.

**Provisions**

Provisions are recognised when the Charity has an obligation at the balance sheet date as a result of a past event, it is probable that an outflow of economic benefits will be required in settlement and the amount can be reliably estimated.

**Foreign currencies**

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.

**Leasing**

Rentals payable under operating leases are charged to the SoFA on a straight line basis over the period of the lease.

**Pensions**

The charitable company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the charitable company in independently administered funds. Contributions are charged to the Statement of Financial Activities as they become payable in accordance with the rules of the scheme.

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Notes to the Accounts**  
**for the year ended 31 December 2021**

**1 Summary of significant accounting policies** *(continued)*

**Tax**

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.

**Going concern**

The financial statements have been prepared on a going concern basis as the trustees believe that there are no material uncertainties exist. Please see the Key judgement note below for further details.

**Key judgements**

In the application of the charitable company's accounting policies, the trustees are required to make judgements, estimates and assumptions about the carrying amount of assets and liabilities that are not readily apparent from other sources. The estimates and associated assumptions are based on historical experience and other factors that are considered to be relevant. Actual results may differ from these estimates. In preparing these financial statements, the trustees have made the following key judgments:

a) The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorising these financial statements. They believe there will be sufficient funds available to support the core costs of the Charity.

b) To determine the proportion of commissioned projects that have been completed, the trustees use costs incurred as a basis and judge that income to be recognised is equivalent to that. Any actual surplus or deficit is determined at project completion and transferred to or from unrestricted funds.

**2 Income from donations**

	Unrestricted Funds	Restricted Funds	2021 Total	2020 Total
	£	£	£	£
Donations	195,530	-	195,530	110,906
Legacy	-	-	-	150,000
	195,530	-	195,530	260,906

2020 Income from Donations was £260,906 of which all the income was attributable to unrestricted funds.

**3 Income from investments**

	Unrestricted Funds	Restricted Funds	2021 Total	2020 Total
	£	£	£	£
General bank interest receivable	32	-	32	566
Income from MCA permanent endowment fund	100,000	-	100,000	110,115
	100,032	-	100,032	110,681

2020 Income from Investments was £110,681 of which all the income was attributable to unrestricted funds.

The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021

4 Income from charitable activities

	Unrestricted Funds	Restricted Funds	2021 Total	2020 Total
	£	£	£	£
Research projects and sales of reports	286,835	297,555	584,390	522,831
	<u>286,835</u>	<u>297,555</u>	<u>584,390</u>	<u>522,831</u>

(note 19)

2020 Income from Charitable Activities was £522,831 of which £260,615 was attributable to restricted funds and the balance of £262,216 was attributable to unrestricted funds.

5 Total expenditure

	Activities Undertaken Directly	Support Costs	2021 Total
	£	£	£
<b>Costs directly allocated to activities:</b>			
Fund raising for donations	57,472	42,320	99,792
Research project costs	445,725	95,713	541,438
Lectures and seminars	20,712	5,731	26,443
Research and organisational development costs	80,433	96,985	177,418
	<u>604,342</u>	<u>240,749</u>	<u>845,091</u>
<b>Support costs allocated to activities:</b>			£
Bad debts			(659)
Database			2,088
Staff costs			65,663
Premises			75,196
General office costs			38,395
Depreciation and leasehold amortisation			12,477
Bank charges and exchange rate difference			2,165
Legal and professional			5,208
Investment manager's fees			20,211
Auditor's remuneration			19,175
Amortisation of trade marks			830
			<u>240,749</u>

The total support cost attributable to charitable activities is apportioned pro rata to the time spent on each charitable activity.

The Trustees have decided to meet some of the governance costs, for example audit fees from unrestricted funds and so no allocation or charge is made to restricted funds.

The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021

5 Total expenditure

The total expenditure for the year ended 31 December 2020 are as follows:

	Activities Undertaken Directly	Support Costs	2020  Total £
	£	£	£
<b>Costs directly allocated to activities:</b>			
Fund raising for donations	69,203	37,702	106,905
Research project costs	253,789	28,822	282,611
Lectures and seminars	21,665	2,872	24,537
Research and organisational development costs	309,629	115,713	425,342
	<u>654,286</u>	<u>185,109</u>	<u>839,395</u>

**Support costs allocated to activities:**

	£
Bad debts	750
Database	2,156
Staff costs	51,929
Premises	51,856
General office costs	29,163
Depreciation and leasehold amortisation	7,948
Bank charges and exchange rate difference	(128)
Legal and professional	6,509
Investment manager's fees	22,928
Auditor's remuneration	11,168
Amortisation of trade marks	830
	<u>185,109</u>

Allocation of expenditure according to funds:

	2021 Total £	2020 Total £
Unrestricted funds	602,013	533,856
Restricted funds (note 20)	222,867	282,611
Permanent endowment funds	20,211	22,928
	<u>845,091</u>	<u>839,395</u>

6 Governance costs

	2021 Total £	2020 Total £
Legal and professional	5,208	6,509
Auditor's remuneration	19,175	11,168
	<u>24,383</u>	<u>17,677</u>

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Notes to the Accounts**  
**for the year ended 31 December 2021**

**7 Auditor's remuneration**

	<b>2021</b>	<b>2020</b>
	<b>Total</b>	<b>Total</b>
	<b>£</b>	<b>£</b>
Audit of the Charity's annual accounts	12,375	7,607
Adjustment to Prior year provision	3,300	
Other services - preparation of the Charity's annual accounts	3,500	3,561
	<u>19,175</u>	<u>11,168</u>

**8 Net income/(expenditure)**

This is stated after charging:

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Depreciation	12,477	7,948
Auditor's remuneration	19,175	11,168
Operating lease rentals	43,470	43,470
Investment return: net of realised and unrealised (gains)/losses	(202,612)	28,953
Amortisation	830	830
	<u>(126,660)</u>	<u>92,369</u>

**9 Trustees' remuneration and key management personnel remuneration and expenses**

None of the trustees received remuneration for their services nor did they receive any reimbursement of expenses during the year.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £216,709 (2020 £218,459).

**10 Staff costs and employee benefits**

	<b>2021</b>	<b>2020</b>
	<b>£</b>	<b>£</b>
Wages and salaries	490,793	486,286
Social security costs	52,780	51,837
Pension costs (see note 11)	29,129	28,788
Pension to former employee	-	-
	<u>572,702</u>	<u>566,911</u>

The number of employees who received total employee benefits (excluding employer pension costs of more than £60,000) are as follows:

	<b>2021</b>	<b>2020</b>
	<b>Number</b>	<b>Number</b>
£60,001 - £70,000	1	1
£70,001 - £80,000	-	-
£80,001 - £90,000	2	2
£90,001 - £100,000	-	-
£100,001 - £110,000	-	-
£110,001 - £120,000	1	1

The average number of employees during the year was:

	<b>2021</b>	<b>2020</b>
	<b>Number</b>	<b>Number</b>
Average number of employees	<u>9</u>	<u>9</u>

The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021

**11 Pension costs**

The charitable company operates a contributory pension scheme. It is a defined contribution scheme and contributions are charged in the statement of financial activities as they are paid. The charge for the year was £32,502 (2020 £29,202) and the liability outstanding at the year end was £1,692 (2020 £896).

**12 Intangible assets**

Trademarks:	£
<b>Cost</b>	
At 1 January 2021	8,300
Additions	-
At 31 December 2021	<u>8,300</u>
<b>Amortisation</b>	
At 1 January 2021	2,490
Provided during the year	830
At 31 December 2021	<u>3,320</u>
<b>Net book value</b>	
At 31 December 2021	<u>4,980</u>
At 31 December 2020	<u>5,810</u>

**13 Tangible fixed assets**

	Improvement to leasehold building	Fixtures and fittings	Computer equipment	Total
	£	£	£	£
<b>Cost</b>				
At 1 January 2021	52,408	2,604	17,799	72,811
Additions	83,943	9,595	270	93,808
Disposals	(34,959)	(2,604)	(3,222)	(40,785)
At 31 December 2021	<u>101,392</u>	<u>9,595</u>	<u>14,847</u>	<u>125,834</u>
<b>Depreciation</b>				
At 1 January 2021	35,444	2,604	14,294	52,342
Charge for the year	8,657	1,488	2,332	12,477
On disposals	(34,959)	(2,604)	(3,222)	(40,785)
At 31 December 2021	<u>9,142</u>	<u>1,488</u>	<u>13,404</u>	<u>24,034</u>
<b>Net book value</b>				
At 31 December 2021	<u>92,250</u>	<u>8,107</u>	<u>1,443</u>	<u>101,800</u>
At 31 December 2020	<u>16,964</u>	<u>-</u>	<u>3,505</u>	<u>20,469</u>

**14 Fixed assets investments in MCA permanent endowment fund**

	2021	2020
	£	£
Fair value brought forward	2,751,597	2,793,364
Investment return: dividends and interest	98,102	110,115
Investment return: income paid out	(100,000)	(100,000)
Investment management costs	(20,211)	(22,928)
Investment return: net of realised and unrealised losses.	202,612	(28,953)
Fair value carried forward	<u>2,932,100</u>	<u>2,751,598</u>
Historical cost	<u>2,312,353</u>	<u>2,217,087</u>

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

Investments at fair value comprised:

	£	£
Equity shares	2,381,245	2,239,978
Fixed interest securities	374,208	392,726
Cash deposits/funds	112,572	86,410
Property funds	64,075	32,484
	<u>2,932,100</u>	<u>2,751,598</u>

The fair value of listed investments is determined by reference to the quoted stock market price at the balance sheet date. Other investments are measured using the following methods:

- a) UK government securities using the London Official Bid & Ask price to calculate the mid-price.
- b) Unlisted and suspended securities at a zero value.
- c) Securities in liquidation using the most recent and reliable valuations available. The most reliable valuation may include using Aberdeen Standard Capital's best price estimates.
- d) Unlisted Floating Rate Notes valued at face or nominal value.
- e) Investments with extended settlement periods (e.g. hedge funds, placings and some unit trusts) use the latest available Net Asset Value.
- f) All values provided are as at the close of business on the valuation date. If the valuation date falls on a non-business day, the prices quoted will be those as at the close of business on the last business day before the valuation date. In some instances, the price quoted for certain holdings may be the last price received prior to the valuation date.

**15 Debtors**

	2021 £	2020 £
Trade debtors	-	300
Prepayments	21,674	5,268
Other debtors	7,587	30,890
Accrued restricted project income	6,794	22,325
	<u>36,055</u>	<u>58,783</u>

Other debtors includes £7,587 (2020 £7,587) falling due after one year.

**16 Creditors: amounts falling due within one year**

	2021 £	2020 £
Trade creditors	19,930	4,487
Accruals	16,314	12,056
Deferred restricted project income (note 19)	-	43,483
Other taxes and social security costs	16,729	-
Other creditors	8,791	12,523
	<u>61,764</u>	<u>72,549</u>

**17 Unrestricted funds**

	£
At 1 January 2021	430,344
Income	582,397
Expenditure	(602,013)
Transfer to restricted fund (note 19)	(34,044)
At 31 December 2021	<u>376,684</u>

£150,000 is designated for Project: Study of Antisemitic Attitudes . These funds are expected to be utilised in 2022.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

**18 Permanent endowment funds**

	At 1 January 2021 £	New Designation £	Utilised £	At 31 December 2021 £
MCA permanent endowment fund	2,675,875	182,401		2,858,276

The charitable company has restricted rights over the capital. It is entitled to the total income, realised and unrealised gains, in any financial year provided these do not exceed 8% of the original grant (£3,466,337) adjusted for inflation.

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the organising and carrying out of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of these purposes. The income of the Fund may be spent by the Charity on a year to year basis as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000, converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

In order for capital to be spent it is necessary to satisfy two conditions:

(1) The first condition is that the total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.

(2) The second condition is that 30 days before the trustees resolve to spend the capital, the market value of the capital of the Fund must be not less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward the unspent part of the 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The Fund is invested on professional advice in order to obtain the maximum long-term total return (net of any tax) which is regarded from time to time as a prudent target for the Fund.

**19 Restricted funds**

	Incoming Resources £	Resources Expended £	Transfer (to)/ from unrestricted funds £	At 31 December 2021 £
<b><u>Total projects and commissions</u></b>	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Project: European Jewish Demography Unit	131,122	(142,400)	11,278	-
Project: European Jewish Research Archive	-	(18,837)	18,837	-
Commission: Jewish Blind and Disabled (JBD)	7,845	(5,431)	(2,414)	-
Commission: JW3 Monitoring and Evaluation Project	2,664	(2,336)	-	328
Commission: Industrial Dwellings Society (IDS)	15,856	(8,003)	(7,853)	-
Project: Study of Antisemitic Attitudes	28,800		-	28,800
Project: Communications	84,974	(5,370)		79,604
Commission: IDS II - Industrial dwellings society II	11,910	(11,910)		-
Commission: EVENS	7,000	(13,785)	6,785	-
Commission: European Jewish Association.	7,384	(14,795)	7,411	-
Total projects and commissions	297,555	(222,867)	34,044	108,732

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

**19 Restricted funds**

The aim and use of each restricted fund is as follows:

(a) Project: European Jewish Demographic Unit - Established in January 2019, JPR's European Jewish Demography Unit is dedicated to generating data about Jewish populations in Europe to help support community development across the continent. Currently supported by the Rothschild Foundation Hanadiv Europe, it is led by JPR Senior Research Fellow, Dr Daniel Staetsky, and chaired by the world's leading expert in Jewish demography, Professor Sergio Della Pergola.

(b) Project: The European Jewish Research Archive: supported by Rothschild Foundation Hanadiv Europe, this is a project to build and maintain an online free to access archive of research publications on contemporary European Jewish communities. The archive includes reports, articles and other relevant materials that draw on, or discuss, social research on European Jewish communities since 1990.

(c) Commission: Jewish Blind and Disabled (JBD) – this study was designed to look at the socio-demographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of JBD's strategic review.

(d) Commission: JW3 Monitoring and Evaluation Project – this annual study is aimed at helping JW3 to monitor and evaluate the effectiveness of their work. It involves helping them to determine what they need to measure in view of their new strategic plan, advising them on how best to gather the required data, and then working with them to determine how best to use it for their purposes.

(e) Commission: Industrial Dwellings Society (IDS) – this project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of specific sites to support IDS's future planning.

(f) Project: Study of Antisemitic Attitudes – first run by JPR together with Ipsos MORI in 2017, this survey, monitoring anti-Jewish and anti-Israel attitudes among the British population, was due to be repeated in 2020. However, due restriction imposed by the Covid-19 pandemic, the study was postponed to 2021.

(g) Project: Communications - With thanks to support from three key foundations, JPR recruited its first Director of Communications in October 2021. The priorities for the first year of the position are (i) to communicate JPR's research outputs to the media and key target audiences; (ii) to redesign the JPR website; and (iii) to build JPR's social media presence. Work began on all three of these areas in the last quarter of 2021.

(h) Commission: IDS II – Industrial dwellings society II – a Jewish housing association working to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services. For both reports, JPR mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of certain areas to support IDS planning work.

(i) Commission: EVENS – a national survey designed to gather information about inequality among ethnic minorities. Our input is specifically designed to help them gather data on Jews and advice on how to analyse it, although we also hope to learn from their work to help inform our own future analysis of Jewish populations.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

(j) Commission: European Jewish Association - The European Jewish Association, a political advocacy organisation with an Orthodox Jewish leaning, based in Brussels, commissioned JPR to create an index to measure how different European countries are faring with regard to major Jewish concerns. The project involved identifying particular variables that are measurable and by which an assessment could be made – for example, whether the government has established a formal governmental position to combat antisemitism, whether it has adopted the IHRA definition of antisemitism, whether it permits shechita or brit milah, or whether it includes the Holocaust or Judaism as part of its national curriculum, etc. The project did not involve data gathering work itself but rather designing the component parts of what such an index might include.

All the funds represent donations received and take into account the research costs incurred during the year.

**20 Analysis of net assets between funds**

	Unrestricted funds £	Restricted funds £	Endowment funds £	Total funds £
Intangible assets	4,980			4,980
Tangible assets	101,800			101,800
Investments	73,824		2,858,276	2,932,100
Current assets	257,844	108,732		366,576
Creditors: amounts falling due within one year	(61,764)			(61,764)
<b>Total net assets</b>	<b>376,684</b>	<b>108,732</b>	<b>2,858,276</b>	<b>3,343,692</b>

**21 Reconciliation of net income to net cash flow from operating activities**

	2021 £	2020 £
Net income/(expenditure)	237,473	26,070
Income from investments	(98,102)	(110,115)
Amortisation of intangible fixed assets	830	830
Amortisation and depreciation of tangible fixed assets	12,477	7,948
Investment return: net of realised and unrealised (gains)/losses	(202,612)	28,953
(Increase) in debtors	22,728	(42,602)
(Decrease) / increase in creditors	(10,784)	(19,244)
<b>Net cash flow from operating activities</b>	<b>(37,990)</b>	<b>(108,160)</b>

**22 Leasing commitments**

At the year end the company had annual commitments under a non-cancellable property lease as set out below:

	2021 £	2020 £
within one year	45,520	14,404
within two to five years	155,329	166,803
Later than five years	190,685	179,212
<b>Total leasing commitments</b>	<b>391,534</b>	<b>360,419</b>
Total lease payments made during the year amounted to £24,126 (2020: £43,710)		

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2021**

**23 Financial Commitments**

Contractual commitments for the refurbishment work for the office contracted for but not provided in the financial statements amount to £nil (2020 £54,375).

**24 Share capital and controlling parties**

The company is limited by guarantee and has no share capital. The liability of its members is limited to £1 per member.

**25 Related party transactions**

There are no related party transactions during the year (2020 £nil).

**THE INSTITUTE FOR JEWISH POLICY RESEARCH**

England & Wales - Charity number 252626

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# Accounts

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**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)**

**Report and Accounts**

**For the Year Ended 31 December 2020**

**Charity No. 252626**

**Company No. 894309 (England and Wales)**

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Contents  
for the year ended 31 December 2020**

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**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Legal and Professional Information  
for the year ended 31 December 2020**

**Registered Charity Number**  
252828

**Company Number**  
884309 (England and Wales)

**Governing Document**  
Articles of Association

**President**  
Lord Leigh of Hurley

**Honorary President**  
Lord Rothschild OM

**Honorary Vice Presidents**  
Lord Haskel  
Peter Levy OBE (Passed away on 16 November 2020)  
Harold Paliner  
Brian Smouha

**Chairman**  
Stephen Moss CBE

**Treasurer**  
Michael Karp

**Executive Director**  
Dr. Jonathan Boyd

**Director of Operations and Secretary**  
Richard Goldstein

**Senior Research Fellows**  
Dr. David Graham  
Dr. Daniel Staetsky  
Carl Leasof

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Legal and Professional Information  
for the year ended 31 December 2020**

**Directors and Board of Management**

William Benjamin	(appointed on 06/07/2020)
Elizabeth Crossick	(appointed on 29/06/2015)
Professor Jonathan Haskel	(appointed on 28/10/2019)
Lord Leigh of Hurley	(appointed on 29/06/2015)
David Karat	(appointed on 29/10/2012 and retired on 20/04/2020)
Michael Karp	(appointed on 21/01/2015)
Shirley Soskin	(appointed on 29/06/2015 and retired on 06/07/2020)
Professor Sergio DellaPergola	(appointed on 28/01/2019)
Miles Webber	(appointed on 17/04/2020)
Hilda Worth	(appointed on 06/07/2020)

**Registered Office**

6 Greenland Place  
London  
England  
NW1 0AP

**Auditors**

Sobell Rhodes LLP  
Chartered Accountants and Statutory Auditors  
The Kinatio Centre  
Theobald Street  
Elstree  
Borehamwood  
Hertfordshire  
WD6 4PJ

**Bankers**

Barclays Bank plc  
1 Churchill Place  
London  
E14 5HP

**Investment Managers**

Aberdeen Standard Capital  
Minerva House  
29 East Parade  
Leeds  
LS1 6PS

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Chairman's Statement  
for the year ended 31 December 2020**

The Institute for Jewish Policy Research (JPR) is an independent research organisation, consultancy and think tank that specialises in contemporary Jewish issues. It has stood at the forefront of Jewish community research for several decades and is responsible for much of the data and analysis that exist on Jews across Europe.

At its core, JPR's objective is to generate research data and analysis to support Jewish community development in the UK and across Europe and inform policy development in dialogue with those best placed to influence Jewish life. In pursuit of this goal, we generate our own research, produce reports on key topics intended to help community leaders better understand major issues, provide bespoke research services and policy advice to support the specific needs of individual organisations and present our research findings at meetings and seminars. In addition, we share our work freely on our website and via online and print media, making it accessible to our target audiences. JPR works across all parts of the Jewish community – from the most strictly Orthodox to the most secular – to enable them to understand their demographics so we can best serve their needs.

2020 was a unique year for everyone and the coronavirus impacted JPR in many ways. The office was closed in mid-March 2020 and all staff began working from home. I am proud to say that the team responded magnificently and not only managed to continue to work largely uninterrupted but shifted its focus almost immediately to address the needs of the community in a desperate time.

As a result of the pandemic, JPR quickly reduced or put on hold some projects in order to concentrate on gathering and analysing data on COVID-19 to provide Jewish organisations with the information they needed to help steer their way through the crisis. In particular, in July 2020, we launched a major survey of Jews across the UK to measure the extent to which they were impacted by the pandemic in the first wave, whether in terms of their health, finances, relationships or Jewish lives. At the same time, our European Jewish Demography Unit team significantly upgraded its work on mortality, to assess accurately the extent to which Jews were affected by the pandemic, both in the UK and around the world. We presented the data and the analysis through a series of published reports as well as at webinars, meetings, seminars and via newspaper articles.

Throughout 2020 and into 2021, JPR was the only research organisation to provide critical and timely data on how Jewish people in the UK were being impacted by the pandemic, in ways specifically designed to help Jewish organisations make critical decisions on how to respond.

JPR's work also continued apace in other areas. Our Demography Unit produced the first in a series of in-depth European country reports about Jewish population trends, this time on Austria. It also produced a highly detailed and ground-breaking report analysing European Jewish demography today, showing how and why the Jewish population of the continent has changed over time and providing essential data to feed into Jewish community planning across the continent. Further afield, we published a landmark major survey of Jews in South Africa for the Kaplan Centre at the University of Cape Town, to provide key data to support community planning across the country. In addition, after several years of building our European Jewish Research Archive, which collects together all research conducted on European Jewish populations since 1990, we analysed its holdings to assess the state of contemporary European Jewish research and produced a report that maps the research field through a variety of lenses, including the topics investigated, geographical coverage and the researchers and publishers involved.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Chairman's Statement  
for the year ended 31 December 2020**

Despite the uncertainty and financial strains that 2020 brought to many community charities, we undertook several commissioned studies for clients during the year, including the Industrial Dwellings Society, Jewish Blind & Disabled and the Lauder Foundation in Vienna, and expect to undertake more of this type of work as the pandemic lifts and community organisations need help determining how best to move forward.

Throughout 2020 our work was accessed and utilised in the field, both in the UK and across Europe, more than ever before. As work meetings and conferences rapidly moved online, JPR presented its work directly to an estimated 1,900 people, at 26 events in 13 cities around the world; our reports were downloaded over 100,000 times and were often front-page news in the Jewish media.

Looking ahead, 2021 is an exciting year for JPR. In the UK, we plan to continue our pioneering work to examine the effects of the pandemic on Jews in the UK, develop our new UK Jewish population panel (the first of its kind in the Jewish diaspora), continue our work on core community statistics such as synagogue membership, Jewish schools' enrolment and births and deaths, initiate a follow-up survey to our 2017 study of the attitudes of the general population of Great Britain towards Jews and Israel, and begin preparation for a new National Jewish Community Survey. Further afield, we will continue to support Jewish communities across Europe through the work of our European Jewish Demography Unit, producing more country-specific reports, updated analysis of COVID-19 mortality, and a ground-breaking study of European Jewish Identity that promises to be of tremendous value to community leaders across the continent.

As always, we remain enormously appreciative of the foundations and trusts that make significant contributions to our work and have stood by us through a very difficult year. Once again, Pears Foundation has shown its unwavering commitment to JPR, providing unrestricted funding to support the Institute's infrastructure along with tremendous moral support. We are also sincerely grateful, once again, to the Maurice Wohl Charitable Foundation and to the Rothschild Foundation Hanadiv Europe for their invaluable multi-year assistance, as well as for the substantial support from the David and Ruth Lewis Family Charitable Trust, the Eranda Rothschild Foundation, the Charles Wolfson Charitable Trust, the Mitchell Charitable Trust and the Genesis Philanthropy Group. Our gratitude too goes to the Morris Leigh Foundation, which continued its longstanding backing for JPR in 2020, and remains an essential source of support, and to the Jewish Leadership Council which invested in JPR for the first time this year, and which we hope will become an essential strategic partner in the years to come. More widely, we convey our gratitude to all of our supporters whose ongoing donations remain essential to our continued success.

Thank you also to our wonderful trustees, who are dedicated to our mission, and provide us with the vision to seek new directions.

Finally, my sincere admiration to the wonderful team at JPR for all their hard work and commitment, including our Executive Director, Dr Jonathan Boyd, our research team consisting of Dr Daniel Staetsky, Carli Lessof, Dr David Graham, Brigitta Horup (joined January 2020) and Dr Keith Kahn-Harris, and our operations team of Richard Goldstein, Carol Glenn, Judith Russell, Rebecca Frankel and Catriona Sinclair. Their work ethic, steadfastness and efficiency during this most difficult of years, has been superb. I am grateful to all of them.

Stephen Moss CBE  
Chairman



Date: 22/9/21

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2020**

The Directors present their Annual Report together with the Audited Financial Statements for the year ended 31 December 2020. The Institute for Jewish Policy Research is a charitable company limited by guarantee under registration number 894309 and is registered by the Charity Commission under registration number 252626. Please refer to pages 1 and 2 for further legal and professional information.

**STRUCTURE, GOVERNANCE AND MANAGEMENT**

The Institute for Jewish Policy Research (JPR) is a registered charitable company and a company limited by guarantee. JPR is governed by its Articles of Association and by the regulations of the Charity Commission and company law.

JPR's governance structure consists of the Board of Directors and a working group of Honorary Officers (Chair and Treasurer), who oversee management matters. Members of the Board are non-executive Directors and Trustees of the charitable company. They determine the overall direction of JPR, provide leadership and fulfil their fiduciary responsibilities.

Trustees are appointed (or reappointed, as the case may be) for a three-year term of office on the recommendation of the Chairman and require approval by the Board. Under usual circumstances, Trustees can serve a maximum of three consecutive terms of office. An amendment was added to the Articles of Association in 2017, allowing for the possibility of further extensions in special circumstances. This amendment was passed by adopting a Special Resolution at the General Meeting of the Company on October 23rd, 2017. It was determined that further additional term or terms (of any such length as is determined by the Trustees), would need to be approved at a meeting of the Trustees.

The Trustees must appoint a Chairman from among their number. The Chairman serves for a three-year term and may be reappointed for one further term of three years. The Chairman may only hold office for such time as he or she is a Trustee.

On co-option to the Board, the Trustees receive the JPR Governance Handbook, which outlines JPR's governance structure and the responsibilities of Board members, and up-to-date documentation on the Institute's aims and programmes.

At all times there must be a President of the Charity, who is appointed by the Trustees. The President may also be a Trustee of the Charity if appointed as such by the Trustees. The President holds office for a three-year term and may be reappointed by the Trustees for such number of further three-year terms as the Trustees see fit.

The Board appoints the Executive Director, who reports to the Board on the substantive areas of the Institute's management. The Board can appoint a Company Secretary who oversees the work in matters of compliance with company and charitable company law. While day-to-day matters are delegated to the staff, all substantive decisions are referred to the Board for approval.

The Board also appoints a Finance Committee which meets regularly during the year to oversee the annual audit, investment strategy and charge out rate for commissions and to carry out an annual financial review; a Fundraising Committee which sets out and supports the fundraising strategy and monitors its progress during the year and a Nominations Committee to oversee succession planning

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2020**

for the JPR Board and Committees. Also the Chairman and the Treasurer both review staff salaries each year and must approve any changes.

The Members of the Board of Directors who served during 2020 are:

Stephen Moss CBE (Chairman)	(appointed 07/09/2010)
Lord Leigh of Hurley (President)	(appointed 29/06/2015)
David Karat	(appointed 29/10/2012 and retired 20/04/2020)
Michael Karp	(appointed 21/01/2015)
Elizabeth Crossick	(appointed 29/06/2015)
Shirley Soskin	(appointed 29/06/2015 and retired 06/07/2020)
Professor Sergio DellaPergola	(appointed 28/01/2019)
Professor Jonathan Haskel	(appointed 28/10/2019)
Miles Webber	(appointed 17/04/2020)
Hilda Worth	(appointed 06/07/2020)
William Benjamin	(appointed 06/07/2020)

During the year end David Karat and Shirley Soskin retired from the board. They contributed greatly to the work of the charity in a variety of ways and the staff and trustees are deeply appreciative. We have also been delighted to welcome three new trustees since the beginning of 2020: William Benjamin, Hilda Worth and Miles Webber.

JPR also has four Honorary Vice Presidents, who hold a general oversight role as required. They are Lord Haskel, Peter Levy OBE, Harold Palsner and Brian Smouha, all of whom previously held senior positions on the Board of Directors. During 2020 Peter Levy, a former Chairman of JPR and longstanding supporter of our work, passed away. We were deeply sad to lose such a committed and engaged Honorary Vice President and friend to JPR over many years, whose guidance and counsel we shall all miss.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £218,459 (2019 £211,731). The Chairman reviews the salaries of all employees annually, including the above mentioned two key management personnel, with reference to their duties and responsibilities, having regard to the resources of JPR and employment legislation.

**OBJECTIVES AND ACTIVITIES**

JPR believes that for Jewish communities to flourish, it is essential that Jewish community leaders and government policymakers have access to independent sociological and demographic research to help them make sound, evidence-based policy decisions. The Institute's work is firmly focused on that goal: supplying Jewish charities and foundations in the UK and across Europe with the latest data to support their planning work; directing key policy makers towards existing research to help them to answer their questions; and providing bespoke research services and policy advice to support the specific needs of individual organisations. JPR works across all parts of the Jewish community – from the most strictly Orthodox to the most secular – to enable them to understand their demographics so they can best serve their needs. Our goal is to help Jewish organisations to become the best versions of themselves by using the data insights we provide to help them to achieve their particular goals. JPR supports them by providing free access to its body of work and research archive, which cover a wide

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range of issues of Jewish communal concern and interest, thereby enabling these charities to benefit from the Institute's latest findings.

JPR's research encompasses a broad variety range of topics. At the most fundamental level, it looks at demography across the UK and Europe: Jewish population sizes, birth and death rates, fertility rates, age distributions and patterns of migration. These types of data are used by charities and foundations working across the Jewish world, helping schools, elderly care homes, social welfare charities, Jewish community representative organisations, governmental bodies and NGOs to better understand Jewish communities and to plan for their future. At the same time, the Institute focuses on multiple specific factors including socioeconomics, education, health and wellbeing, Jewish identity and practice, charitable giving, campus life, antisemitism, attitudes to Israel and other communal issues, thereby shedding light on some of the most pressing issues facing Jews today.

JPR presents its research findings in various settings such as symposia and seminars aimed at specific groups, strategic planning days involving key communal leaders, training days for staff teams of specific organisations, academic conferences and public events. JPR shares its work on its website and via online and print media, seeking to make it accessible at all times to target audiences and beyond.

## **JPR'S WORK IN 2020-21**

### **1. RESEARCH REPORTS PUBLISHED DURING 2020**

The core of JPR's work is its research reports, which are made freely available to download to maximise the scope of the work being accessed and utilised in the field. In 2020, as a consequence of the COVID-19 pandemic, JPR shifted the focus of its work, reducing down or putting on hold some projects in order to concentrate on gathering and analysing data on coronavirus to provide Jewish organisations with the information they need to help navigate their way through the crisis. In particular, in July 2020, JPR launched a major survey of Jews across the UK to measure the extent to which they were impacted by the pandemic in the first wave, whether in terms of their health, finances, relationships or Jewish lives. At the same time, the charity's European Jewish Demography Unit team significantly upgraded its work on mortality, to assess accurately the extent to which Jews were affected by the pandemic, both in the UK and around the world.

The Institute published nine reports in 2020, whilst working on several others for subsequent publication.

#### **1.1 COVID-19 RELATED REPORTS**

##### ***Renew our days as of old: will we go back to Jewish activities and events? (September 2020)***

This paper focuses on the issue of how comfortable Jews feel about attending Jewish activities and events in person. It finds that whilst Jews situate themselves across the full length of the 'comfort scale' (ranging from very comfortable to very uncomfortable), there is a clear leaning towards the uncomfortable end. It also found a correlation between how comfortable people feel about attending community activities and events in person, and their general state of mental health. Those showing signs of psychological distress feel notably less comfortable than others.

##### ***Hidden effects: The mental health of the UK's Jewish population (October 2020)***

This short report looks at the effects of the coronavirus outbreak on the UK Jewish population,

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focusing on the impact of the pandemic on mental health. The study shows that levels of anxiety rose across the Jewish population in the UK in the context of the pandemic, as they did across the UK population more generally, and certain subgroups – notably young people, women and those who had experienced job losses or been furloughed – stand out. Other groups identified in the research as showing particularly high levels of mental distress include the permanently sick and disabled, adults with young children at home, those experiencing multiple underlying health conditions that make them particularly vulnerable to the virus, and those suffering from ‘Long COVID.’ The report further examines the data by synagogue membership and finds that synagogue members are notably less likely to be experiencing mental health issues than non-members.

***Acute disadvantage: Where is the need greatest? (October 2020)***

This paper explores how Jewish households were impacted financially over the first few months of the crisis (March to July 2020). The study uses four measures that households may have had to take to identify those showing signs of ‘acute disadvantage’: having had to use food banks; having had to reduce the size of meals because there was not enough money to buy food; having had to borrow money or use credit; and/or struggling to pay bills (for example food and energy). It finds that 7% of Jewish households were in this position at the time of the survey, with a further 15% of households at some risk of becoming acutely disadvantaged should their economic circumstances deteriorate. Strictly Orthodox households and single-parent households were found to be most likely to be vulnerable. However, overall, it demonstrates that in general, Jewish households went into the pandemic in stronger economic health than the UK population, and all other religious and ethnic subgroups.

***Jews and coronavirus in England and Wales (July 2020)***

Since the earliest days of the coronavirus outbreak in the UK, concerns were being expressed that Jews had been disproportionately affected, with mortality levels among them abnormally high. Initial hypotheses arguing that this could largely be explained by geographical and age factors were both proven and challenged by a June 2020 paper published by the Office for National Statistics. It showed that Jews were more likely to be affected because of their above average age profile and where they tend to live (London and other urban centres), but that even after accounting for these and other sociodemographic variables, they were still found to be disproportionately vulnerable. This short paper draws on existing evidence to investigate why this might be the case. In particular, it explores whether the long-established above average health profile of Jews in the UK has shifted in such a way as to result in elevated levels of mortality from COVID-19, and whether behavioural factors – particularly in the most Orthodox parts of the community – affect the numbers in any significant way. In brief, it finds that there has been no such change in the fundamental health status of British Jews, and that regardless of any specific issues within haredi communities, the vast majority of COVID-19 related deaths among Jews have occurred in the mainstream, non-haredi sector.

***COVID-19 mortality and Jews: A global overview of the first wave of the coronavirus pandemic, March to May 2020 (November 2020)***

This study draws on data from a wide variety of sources to understand the extent to which Jews were affected by coronavirus in different parts of the world during the first wave of the pandemic, March to May 2020. It demonstrates that there was not a single ‘Jewish pattern’ that is observable everywhere, and, with respect to the presence of excess mortality, Jewish communities, by and large, followed the populations surrounding them. It cautions against speculation about why Jews were disproportionately affected in some places, but rules out two candidate explanations: that Jewish

populations with particularly elderly age profiles were hardest hit, or that Jews were badly affected due to any underlying health issue common among them.

## **1.2. INTERNATIONAL REPORTS**

### ***The Jews of South Africa in 2019: Identity, community, society, demography (April 2020)***

This study, published in conjunction with the Isaac and Jessie Kaplan Centre for Jewish Studies at the University of Cape Town, contains a detailed demographic assessment of the South African Jewish population and the results of the 2019 Jewish Community Survey of South Africa – the largest and most extensive survey of its kind ever undertaken. The study is designed to provide an up-to-date set of empirical data to help Jewish community leaders plan for the future, including those involved in social care, health and welfare, education, religious life and combating antisemitism.

### ***Jews in Austria: a demographic and social portrait (June 2020)***

This report is the first in a series of in-depth European country reports about Jewish population trends and focuses on Austria. It presents a thorough analysis of fertility rates, age distribution data, patterns of Jewish identity, migration and intermarriage rates to predict the future of Austrian Jewry, and demonstrates, carefully and methodically, that the population is projected to grow. Whilst the Austrian Jewish population is small, its projected growth constitutes an important finding in European Jewish demography.

### ***Jews in Europe at the turn of the Millennium: Population trends and estimates (October 2020)***

This detailed and thorough report takes the reader through one thousand years of European Jewish demographic history before arriving at the most comprehensive analysis of European Jewish demography today. It explores how the shape and size of the European Jewish population have ebbed and flowed over time, beginning in the twelfth century, travelling through many years of population stability until the tremendous growth of the nineteenth and early twentieth centuries, followed by the dramatic decline prompted by a combination of mass migration and the horrors of the Shoah. The study proceeds to look at the major blocs of the European Union and the European countries of the Former Soviet Union, as well as providing country-by-country analyses, ranging from major centres such as France, the UK, Germany and Hungary, to tiny territories such as Gibraltar, Monaco and even the Holy See. The report also contains the most up-to-date analysis we have on the key mechanisms of demographic change in Europe. Beyond the value of the report, the underlying data are essential tools for the JPR team to utilise as we support Jewish organisations across the continent to plan for the future.

### ***Social research on European Jewish populations: the state of the field (December 2020)***

After several years building the European Jewish Research Archive, which collects together all research conducted on European Jewish populations since 1990, JPR analysed its holdings to assess the state of contemporary European Jewish research. Drawing on over 2,500 studies written over almost three decades, the report maps the research field through a variety of lenses, including the topics investigated, geographical coverage and the researchers and publishers involved. It finds that research priorities have shifted over the past three decades: whereas studies of identity and community outnumbered studies of antisemitism by almost four to one in the 1990s and over two to one in the 2000s, the balance completely changed in the 2010s, when 27% of all reports published focused on antisemitism, compared to 19% on identity and community. The report concludes with a discussion about how research on contemporary European Jewish life might be strengthened, supported and improved.

### **1.3. COMMISSIONED STUDIES FOR CLIENTS**

Through most of 2020, much of JR's work was focused on investigating the impact of COVID-19 on the Jewish community. However, JPR completed three other commissioned studies: for the Industrial Dwellings Society (IDS), Jewish Blind & Disabled (JBD) and the Ronald S. Lauder Foundation.

#### **Industrial Dwellings Society**

The first of two commissioned reports for IDS, this study mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of a potential new site for IDS, designed to contribute towards a plan to build 500 new affordable units in Jewish neighbourhoods for low-income Jewish families and Jewish/non-Jewish professionals working in Jewish services.

#### **Jewish Blind & Disabled**

This commission from JBD looked at the sociodemographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of the organisation's strategic review.

#### **Ronald S. Lauder Foundation**

This study, commissioned by the Lauder Foundation, looked at projections of demand for Jewish school places in Vienna for the Lauder-Chabad school system. The system includes a kindergarten, primary school, middle school and high school.

### **1.4. RESEARCH REPORTS IN DEVELOPMENT DURING 2020**

In addition to these reports, preparatory work was carried out in 2020 for several other reports, some of which have been published since the end of 2020, while others remain in development. Most notably, this work included:

#### ***Jewish community income: How is it being affected by the pandemic? (January 2021)***

As part of JPR's COVID-19 survey programme looking at the impact of the pandemic on the lives of Jews across the UK, this fourth paper drawing on our July 2020 survey explores its effects on investments in the Jewish community infrastructure through charitable giving and fees to synagogues and schools.

#### ***Moving beyond COVID-19: What needs to be done to help preserve and enhance Jewish communal life? (March 2021)***

This paper draws together much of the research work related to the coronavirus pandemic that JPR has undertaken and utilised, and makes recommendations about how senior Jewish community leaders and investors should help to preserve and strengthen Jewish communal life going forward.

#### ***Jewish employment patterns: How the COVID-19 pandemic is affecting Jewish people's working lives Moving beyond COVID-19: What needs to be done to help preserve and enhance Jewish communal life? (March 2021)***

This fifth paper on the findings of JPR's COVID-19 survey explores the effects of the pandemic on the working lives of Jews. Designed to help support community planning efforts, the study has a particular emphasis on the issues of unemployment, redundancy, furlough and other significant work disruptions.

*Lasting effects: Experiences of COVID-19 and Long COVID symptoms among Jews in the UK (May 2021)*

This sixth paper on the findings of JPR's COVID-19 survey investigates the prevalence of COVID-19 infections and 'Long COVID' among Jews in the UK. The report aims to help understand how the pandemic has impacted Jews in the UK and make a contribution to medical research.

**2. PRESENTATIONS, DOWNLOADS AND ACTIVE USE OF JPR RESEARCH DATA AND FINDINGS**

In 2020 JPR presented its work directly to an estimated 1,900 people, at 26 events in 13 cities around the world, most of which was carried out virtually due to the pandemic. Among the more significant events during 2020 were the following:

Date	Client	Detail
January	Dangoor Leadership Programme (Lead, UK)	Presentation on key trends in UK Jewish community to participants on UK Jewish community's leadership training programme.
	Israel Ambassador to UK	Presentation about antisemitism in the UK to major community leaders and donors at the Ambassador's residence in London
	UJIA Leadership Programme (Lead, Manchester)	Presentation on key trends in UK Jewish community to participants on the Manchester Jewish community's senior leadership training programme.
	South Manchester synagogues	Presentation on key trends in UK Jewish life to lay and professional leadership of a group of synagogues in south Manchester working together on a shared plan for the area.
	Kenton Synagogue	Presentation on key trends in UK Jewish life to synagogue members as part of the community's adult education programme.
March	South African Jewish leadership, Johannesburg	Presentation of research on the South African Jewish population to help inform community planning across the country.
June	European Commission Working Group on Antisemitism	Presentation outlining key approaches to measuring antisemitism as part of a pan-European initiative by the European Commission to improve research on antisemitism in all EU Member States.
July	Jewish Medical Association	Presentation of data on Jewish mortality from COVID-19 to medical practitioners in the UK
September	Central Council of Jews in Germany	Presentation of data on Jewish mortality from COVID-19 in Germany, with comparisons to Jewish populations elsewhere around the world, to help inform the German Jewish community's response.
	Jewish Leadership Council	Presentation of early insights from JPR's COVID-19 survey, attended by senior leaders of Jewish organisations from across the community to help inform the community's response.
October	Office of the Chief Rabbi, UK	Presentation of early insights from JPR's COVID-19 survey, attended by the Chief Rabbi and his staff to

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		help inform the community's response.
	Board of Deputies of British Jews	Presentation of data on Jewish mortality from COVID-19 in the UK, with comparisons to Jewish populations elsewhere around the world, to help inform the UK Jewish community's response.
	Pears Foundation, Wohl Foundation, Rothschild Hanadiv Foundation	Presentation of early insights from JPR's COVID-19 survey, attended by the senior leaders of these key foundations, to help inform the community's response.
	Morris and Manja Leigh Memorial Lecture delivered by Lord Mann of Holbeck Moor	Annual JPR lecture to investigate key issues in contemporary Jewish life. Delivered by Lord John Mann, advisor to the government on antisemitism, entitled 'Antisemitism today: Can it be combated?'
	Federation of Austrian Jewish Committee	Presentation of data on Jewish mortality from COVID-19 in Austria, with comparisons to Jewish populations elsewhere around the world, to help inform the Austrian Jewish community's response.
	Central Welfare Organisation, Belgium	Presentation of data on Jewish mortality from COVID-19 in Belgium, with comparisons to Jewish populations elsewhere around the world, to help inform the Belgian Jewish community's response.
	Jewish Leadership Council/Jewish mental health charities	Presentation of JPR's research on the effects of the pandemic on the mental health of Jews in the UK, to help inform work in the mental health sector.
November	UJA-Federation of Toronto	Presentation of data on Jewish mortality from COVID-19 in Canada, with comparisons to Jewish populations elsewhere around the world, to help inform the Canadian Jewish community's response.
	Jewish community leaders and academic in Hungary	Presentation of data on Jewish mortality from COVID-19 in Hungary, with comparisons to Jewish populations elsewhere around the world, to help inform the Hungarian Jewish community's response.
	Jewish community leaders and academics in Sweden	Presentation of data on Jewish mortality from COVID-19 in Sweden, with comparisons to Jewish populations elsewhere around the world, to help inform the Swedish Jewish community's response.
	JW3	Joint JPR/JW3 public event on 'Jewish life in the age of coronavirus,' sharing key data from our national survey looking at the effects of the pandemic on UK Jewish life.
	UJA-New York Federation	Presentation and discussion of data on European Jewish demography to support UJA/NY's investments in European Jewish life.
	Conseil Représentatif des Institutions Juives de France (CRIF)	Presentation and discussion of data on European Jewish demography to support CRIF leadership's understanding of the French Jewish community in the context of European Jewish life.
December	B'nai B'rith Europe	Presentation and discussion of data on European Jewish demography to support B'nai B'rith's understanding of contemporary European Jewish

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		life.
	Anti-Defamation League	Presentation and discussion of data on European Jewish demography to support ADL's planning about the future of European Jewish life.
	JPR	Public presentation of data on Jewish mortality around the world to an international audience, based on our recent report: COVID-19 mortality and Jews.

JPR's research is regularly featured in UK national, international and Jewish media, including the BBC, The Times, The Guardian, The Economist, The Spectator, The Evening Standard, The Mail, 124 News, The Jerusalem Post, The Times of Israel, Haaretz, Arutz Sheva, Israel Hayom, Jewish Exponent, the Jewish Chronicle, Jewish News, the Jüdische Allgemeine, The Australian Jewish News, The South African Jewish Report, the Algemeiner, The Jewish Telegraphic Agency and The Forward.

In addition, JPR Executive Director, Dr Jonathan Boyd, has a monthly column in the Jewish Chronicle in which he uses data generated by JPR and other agencies to share his reflections about contemporary Jewish life. This is part of a deliberate strategy to raise awareness about JPR and its work and to promote the use of data in understanding community trends and issues.

In 2020, JPR reports were downloaded 100,652 times and JPR's e-newsletters reached close to 5,000 people every edition, with an opening rate of over 30%.

### **3. OTHER INITIATIVES**

#### ***UK Jewish Population Research Panel***

JPR began a pioneering new initiative in 2019 to establish a research panel of Jews in the UK. This is a project designed to considerably boost the Institute's capacity to gather attitudinal data about British Jews, to lower the expense of doing so, and to provide a more efficient and timely data-gathering service for Jewish charities, trusts and foundations to help them better understand Jewish public opinion. In 2020, during the COVID-19 pandemic, the Institute launched its first trial survey to help recruit panel members. 5,000 people signed up – a very successful outcome for a project that had never previously been attempted anywhere in the world. As JPR moves forward, this project is intended to become a centrepiece of its work in the UK.

#### ***Monitoring, evaluation and learning (MEL)***

Since 2019, JPR has been exploring how to develop its work in this area, and in 2020 we worked to build infrastructure to support future MEL work, and made progress in ensuring that evidence underpins the work of community organisations. This included:

- Working closely with JWS to develop its MEL work, offering evidence on how Jews have responded to educational and cultural activities offered online during the COVID-19 pandemic, and helping them to look at the client groups they have gained and lost;
- Supporting Jewish Blind and Disabled with its needs analysis work, providing demographic data to help them identify and quantify their target base;
- Supporting the Industrial Dwellings Society with needs analysis work to underpin the building of 500 new housing units in Jewish neighbourhoods which are designed for low-income Jewish families and non-Jews working in the Jewish sector;

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- Developing JPR's new research panel, which is designed to play an essential role in supporting research and evaluative work for Jewish organisations across the country. The panel is key to JPR's capacity to undertake needs analysis work in a number of areas (e.g. poverty, employment, mental health, etc.), and it will strengthen JPR's ability to measure awareness of existing services or new measures. The panel has also involved JPR in buying new software to conduct surveys, which can be used for multiple purposes, including MEL research;
- Working to build an up-to-date database of Jewish services (synagogues, nurseries, schools, care homes, shops) and investing in the software to be able to map them, alongside Jewish population counts and Jewish sub-populations according to various criteria (age, economic status, health, etc.) This developing resource is being built as part of a larger vision and will be used for a range of future projects, including those in the area of MEL.

***European Jewish Research Archive (EJRA)***

Work progressed on JPR's European Jewish Research Archive (EJRA), a publicly available online archive for research publications on contemporary European communities. The archive includes items that draw on, or discuss, social research on European Jewish communities since 1990. In 2020, the archive had 11,853 unique visitors to the site; they spent 14,083 unique sessions on the site and produced nearly 25,660 page views, overall a 10% increase on 2019. The archive now contains over 3,500 items in 29 languages covering 54 countries.

**4. JPR'S RESPONSE TO CORONAVIRUS**

The coronavirus pandemic affected JPR in many ways as mentioned above. In spite of several public events having to be cancelled or postponed in 2020, JPR has continued to present its research findings online to government policymakers and Jewish community leaders in cities across the world and to representatives of organisations from across the political and religious spectrums.

As outlined in detail above, the charity shifted the focus of its work to concentrate on gathering and analysing data on COVID-19 to help Jewish community organisations steer their way through the crisis and rebuild after. As well as publishing the various above-mentioned COVID-19 related reports and papers, JPR Executive Director, Dr Jonathan Boyd, used his monthly column in the Jewish Chronicle to share his reflections about contemporary Jewish life on a wide range of topical issues. In 2020, his columns were dominated by the pandemic and included the following:

- *Coronavirus could destroy our community* (1 April 2020)
- *It's not who we are that kills, it's where we live* (2 May 2020)
- *You can help us find out the impact of COVID-19* (10 July 2020)
- *Find your own path to return to a new normal* (23 September 2020)
- *Mental health is in crisis among young people* (16 October 2020)
- *Our way of life put us in danger from the virus* (24 December 2020)

JPR also ran a series of online events in late 2020 and early 2021 to promote the work carried out by the research team. These included:

- *Jewish communities across the world impacted by COVID-19* (21 December 2020)
- *After the pandemic: where next for British Jewish life?* (6 May 2021)

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The recordings of both these webinars, as well as others conducted by JPR, are freely available on JPR's new YouTube channel.

**PUBLIC BENEFIT**

The Institute for Jewish Policy Research is an independent research institute that conducts and disseminates research on contemporary Jewish communities. JPR's research is policy-oriented; it collects and analyses data and makes it available to policy-makers, service providers and the general public through online and print publishing.

The Directors, having given careful consideration to the Charity Commission's guidance on public benefit, have concluded:

JPR's aims and activities give clearly identifiable benefits to the public and continue to be charitable. The work particularly benefits the Jewish voluntary sector in the United Kingdom and elsewhere in Europe. Through its pioneering social research, JPR also makes contributions to the wider voluntary sector, by sharing its knowledge and scholarship, thereby benefiting wider society. The benefits are not unreasonably restricted in any way.

**PERFORMANCE**

As always, a major measure of JPR's effectiveness is shown by how many Jewish community leaders and organisations use its research to inform their policy decisions. 2020 was in many ways a unique year with the global pandemic effectively shutting down Jewish communities along with the rest of the world, causing major disruption as well as grief and distress. This was a completely new and unanticipated situation which communities needed to navigate their way through. As explained above, JPR swiftly shifted gear towards gathering data to help community leaders understand what was going on throughout the pandemic. Our work included running the largest survey ever conducted of British Jews, being the only research institute anywhere in the world to investigate coronavirus mortality rates among Jews internationally, and spending months providing Jewish community leaders with essential data on how the pandemic was affecting Jewish people in the UK and across the world.

The JPR outputs shown above indicate how often the Institute's various reports on the impact of the pandemic were downloaded, and how often JPR was invited to present the data to organisations, not just throughout the UK but internationally too. Nearly all JPR's COVID-19 related reports were covered by the Jewish press, often on their front pages.

JPR achieved a very significant milestone in 2020 – the creation of a research panel of Jews in the UK. As mentioned earlier, once firmly established, this should both help to reduce the cost of surveying British Jews going forward and enable us to provide much more timely data to Jewish charities to support their planning needs.

Given the prevailing environment and the volatility in the world markets, 2020 was mostly a successful year for JPR in terms of income. All of JPR's major funders remained committed to their pledges of donations and grants to the charity, and most of our mid-range donors held up. The income from the endowment fund took a hit, falling by a third compared to 2019. However, JPR trustees recognised this early on in the year, and made budgetary adjustments to compensate. The capital value of the endowment took a large fall during the year in line with world markets but recovered by the end of December almost to regain its value a year earlier.

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Income from commissioned work was down in 2020, both because the Institute's focus shifted towards producing reliable data on the impact of the pandemic and because Jewish organisations were less willing to invest in research during such an unstable period. However, commissions picked up in the last few months of the year and in early 2021, when JPR was approached by many organisations wishing to discuss new commissions.

Overall, 2020 was an exceptional year for JPR in the context of what was going on around the world. The JPR team continued to be incredibly productive whilst working from home, income held at a steady level, we published more reports in a twelve-month period than ever before, and our work was utilised widely as community leaders sought to understand the effects of the pandemic.

2021 promises to be another important year for JPR. As outlined below, the Institute intends to build on its research panel, deliver another COVID-19 related survey, continue its work on Jewish populations across Europe and progress an updated survey of anti-Jewish and anti-Israel sentiment in Great Britain. It is a compelling programme that is backed by solid fundraising plans and significant reserves.

#### **LOOKING AHEAD**

Following a year of focused work providing the Jewish community with data to plan their way through the instability of the coronavirus pandemic, JPR has a compelling list of projects to look forward to in 2021.

##### **Further work on the COVID-19 pandemic**

Whilst continuing to produce further reports from the July 2020 survey, JPR is preparing a repeat national survey focusing on the effects of COVID-19 on Jews in the UK, due to take place in summer 2020, with a view towards sharing its findings widely with community leaders. In addition, the charity will continue its work to track mortality rates across the Jewish world to feed essential data to community leaders as the situation evolves across the world to help them to shape their response.

##### **Developing our new UK Jewish population research panel**

As mentioned earlier, JPR began a pioneering new initiative in 2019 to establish a research panel of Jews in the UK. In 2020, during the COVID-19 pandemic, JPR launched its first trial survey to help recruit panel members. 5,000 people signed up – a very successful outcome for a project that has never previously been attempted anywhere in the world. Over the next few years, this project is intended to become a centrepiece of JPR's work in the UK.

##### **Preparing the next National Jewish Community Survey**

2021 is UK Census year and whilst the data will not start to be available for analysis until 2022 at the earliest, JPR will be doing some awareness-raising work across the community in the meantime to encourage Jews to tick 'Jewish' in the optional religion question. In addition, the charity will be preparing to run its National Jewish Community Survey (NJCS) to gather key data about Jewish identity, practice, belonging, intermarriage, education, charitable giving and health and welfare, that can be used in conjunction with census data to support planning work by all Jewish charities. Work on NJCS will begin in 2021, with fieldwork expected to take place in 2022.

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**Continuing our work on core UK community statistics**

This work, which includes measuring births, deaths, marriages and divorce rates, as well as Jewish school enrolment and synagogue membership, is fundamental to understanding the basics of British Jewish life and feeds into our work in multiple ways. In 2021, JPR will be undertaking a new synagogue membership survey, the first since 2016, to measure affiliation rates and to feed into its methodological work on the research panel, and will be publishing up-to-date data on Jewish school enrolment rates.

**New monitoring work in light of the pandemic**

The pandemic has prompted us to think more deeply about the data needs of the Jewish community, and to identify several research initiatives that the Institute believes ought to be introduced to help community leaders to identify and understand any volatility in the community. Chief among these is work in the area of community income: at present, there is no standardised research being carried out to assess income levels across the community, to detect whether these are stable, increasing or declining over time, and how, if at all, major disruptions (such as the pandemic or economic downturns) affect it. Another important area is employment: with haredi population growth ever more apparent, and with continuing concerns about low employment levels within that community, it is essential to track precisely what is going on. Funding will need to be found to activate these initiatives.

**Continuing to support Jewish communities across Europe**

JPR is currently working to produce several new reports from its European Jewish Demography Unit, including in-depth country reports on Belgium, Poland and Spain/Portugal; a follow-up report on global COVID-19 mortality data to help inform national community strategies to respond to the virus; and a pan-European study examining Jewish identity across the continent. The Institute is also looking to engage new foundations with an interest in European Jewry in this work, with a view towards raising the funds to run a regular pan-European census of Jewish schools.

**Building monitoring, evaluation and learning capacity**

JPR has already undertaken some initial development work, as explained above, to create a capacity to undertake evaluative research to assess the impact of different initiatives in and around the Jewish world. The COVID-19 pandemic put some of these plans on hold temporarily, but the charity secured its first client in early 2020 and is keen to build this part of its programme going forward. This area of work variously involves helping Jewish charities to monitor the impact of their own work, running evaluation studies for client organisations, and exploring some of the most pressing issues in Jewish life – for example, what methods work best in Jewish education; what interventions are most effective in combating antisemitism; what approaches are most successful in elderly care; etc. Funding will need to be found to make significant progress in this area, but is regarded as a priority.

**Measuring levels of anti-Jewish and anti-Israel sentiment in Great Britain**

Work is underway on a follow-up to JPR's 2017 study of the attitudes of the general population of Great Britain towards Jews and Israel, to track change over time. The project was delayed due to the pandemic – face-to-face interviews have not been possible for some time – but with 70% of the funds required already raised, JPR hopes to activate the study in 2021 if we can successfully raise the remainder of the funds needed.

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(A Company Limited by Guarantee)  
Report of the Directors  
For the Year Ended 31 December 2020**

**Continuing to maintain JPR's archive of research on contemporary European Jewish life**

JPR started building its European Jewish Research Archive in 2014 with the support of the Rothschild Foundation Hanadiv Europa (RFHE). It has involved a tremendous amount of work, not only collecting and digitising thousands of reports, but also building the technological infrastructure to make the archive accessible and searchable. RFHE has now shifted its support to JPR's European Jewish Demography Unit instead, but the Institute is continuing to maintain the Archive as far as possible from its own core funds.

**RISK ASSESSMENT**

Risk management is reviewed regularly by staff and a Risk Register is submitted to the Board for approval on an annual basis. The Directors have identified the main risks to which the charitable company is exposed and have taken steps to mitigate them.

**FINANCIAL REVIEW FOR THE YEAR**

The Chairman's Statement on pages 3-4 provides a summary of activities during the year. The results for the year are shown in the Statement of Financial Activities on page 25.

JPR's income continues to come from four main sources: the MCA Endowment; grants from foundations; commissioned work and donations.

The value of the endowment fund recovered to £2,751,598 at the end of 2020 after falling to £2,393,450 at the end of March. The end of 2020 figure almost reached the total at the end of 2019 (£2,793,364). The income attained from the fund's investment was £110,115, significantly lower than the 2019 total, but as planned in advance by the Trustees.

The fund's investment manager said that the COVID pandemic had a considerable impact on the portfolio in a number of ways. During the first quarter of 2020, global lockdowns and the scale of the unknown caused significant falls in share prices around the world. Over this period, the portfolio offered better downside protection than the peer group (ARC Charity Steady Growth), but was by no means immune to the fall in capital. More pressingly for the objectives of the portfolio, there was a reduction in bond market liquidity, which caused wider spreads in bond purchasing, thereby impacting the existing strategy to boost income. This was while yields by equities also began to fall, as companies reduced or cancelled dividends due to the uncertainty. Nevertheless, capital values did recover quickly after the first quarter of the year as more became known about the virus, and were then further boosted towards the end of the year by the announcement of multiple successful vaccine trials. This recovery has continued into 2021, with the increasing speed of the vaccine roll out and level of stimulus provided by governments around the world continuing to support equity markets.

Against this backdrop the aims of the fund remain true to a 'quality, sustainable growth' approach. The fund manager does not believe that highly indebted companies with unsustainable growth can lead equity markets over the long term. The portfolio is focused on investments that are underpinned by structural growth trends that make high-quality balance sheets and management, and good visibility on how they will achieve growth. The resilience of this approach meant that the portfolio weathered the market falls and start of the market recovery in the first three quarters of 2020 relatively well. The portfolio has still participated in the post-vaccine equity market rally, albeit in the main to a lesser degree than the broader market. The approach is designed to lock in growth that is

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less dependent on the economic cycle and therefore more sustainable over the long term. The fund will continue to be exposed to stocks that should benefit from the recovery but are also underpinned by structural growth trends.

The outlook suggests income will continue to be a challenge into 2021 because, while there are positive signs for the end of COVID-19 and a return to normal, there will inevitably be a lag between this and company revenues being restored to a point to pay dividends at historic levels. The investment manager has looked over the course of 2020 and into 2021 to diversify income sources in the portfolio to help with future requirements. Going into 2021 there is hope of a strong recovery towards the second half of the year when economies are able to reopen and government stimuli help to kick start the economy. Some changes to the portfolio have already been made in this regard and others will be made over the course of 2021 to ensure that the fund continues to meet the objectives set by the charity.

In 2020, JPR secured a total of £523,122 unrestricted donations, up from £355,203 in 2019. This included the Pears Foundation (£75,000), the second of three £75,000 annual grants from the Maurice Wohl Charitable Foundation, as well as a new grant of £30,000 from Eranda Rothschild. In addition, the Lewis Family Charitable Trust (£35,000) and the Charles Wolfson Charitable Trust (£25,000) repeated their sizeable donations again in 2020. Income from commissioned work brought in £246,629 in 2020, a slight increase from 2019 of £203,658.

With the COVID-19 crisis hopefully receding in 2021, the financial outlook for JPR looks encouraging. Together with the work achieved in 2020 and new, exciting projects to look to in 2021, the fundraising sub-committee, chaired by JPR Chairman Stephen Moss CBE, has excellent material upon which to build and deliver fundraising activities. This, alongside JPR's strong financial reserves, points to a bright future for JPR.

#### **PERMANENT ENDOWMENT INVESTED IN TOTAL RETURN BASIS**

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the preparation and production of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe, together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of the said purposes. The income of the Fund may be spent by the Charity on a year-to-year basis, as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000, converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

In order for capital to be spent it is necessary to satisfy two conditions:

1. The total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.
2. Thirty days before the trustees resolve to spend the capital, the market value of the Fund must be not less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward the unspent part of such 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

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The fund is invested in a discretionary agreement with Aberdeen Standard Capital. Charlie Thompson and Rob Richardson took over as account managers in July 2019 and work together to maximise the long-term return whilst providing a good level of income as agreed with the Board. Charlie graduated in 1998 with a 1st class honours degree from Leeds University before starting his career in the city. He has 18 years of investment experience, is a Chartered Wealth Manager and is a Fellow of the Chartered Institute for Securities and Investment. Rob has six years of investment experience, is an IMC holder and is an Associate Member of the Chartered Institute for Securities and Investment.

The Board has adopted an ethical policy for the investment of these funds, namely, not to invest in any companies involved in the manufacture and distribution of tobacco and arms or any companies that boycott Israel.

**RESERVES POLICY**

JPR's reserves policy is to seek to hold three to six months of overheads. This would amount to between £209,000 and £419,000 (2021). As of 31 December 2020, there was a surplus of unrestricted funds of £430,344 which is in line with the target range as set out above.

JPR has adopted this policy to cover for the risk of any unforeseen emergencies, such as unexpected IT costs or day-to-day operational costs, such as employing temporary staff to cover sickness absence during major projects. The reserves policy will also cover any fluctuations in income, such as late payments for commissioned work or large grants being delayed or not renewed. The reserves will ensure any expenditure on preparatory work on projects is covered, as well as any necessary organisational development costs not covered by income.

The policy of holding three to six months' reserves will enable JPR to develop new sources of finance or cut back on expenditure should an emergency arise. In the meantime, such a prudent policy provides a stable base for JPR's research and the dissemination of the results to assist Jewish communities in the UK and continental Europe.

**STATEMENT OF DIRECTORS' RESPONSIBILITIES**

The Directors are responsible for preparing the Directors' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards (the United Kingdom Generally Accepted Accounting Practice).

Company law requires the Directors 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 the incoming resources and application of resources, including the income and expenditure, of the charitable company for the year. In preparing these financial statements, the Directors are required to:

- select suitable accounting policies and then apply them consistently;
- observe the methods and principles in the Charities SORP;
- make judgements and 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;

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For the Year Ended 31 December 2020

- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The Directors are responsible for keeping proper accounting records that 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 and Charities Act 2011. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

Insofar as the Directors are aware:

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

The Directors 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 Board



Stephen Moss CBE  
Chairman

Date: 22 September 2021

### Opinion

We have audited the financial statements of The Institute for Jewish Policy Research (the 'charitable company') for the year ended 31 December 2020 which comprise which comprise the Statement of Financial Activities, Balance Sheet, Statement of Cash Flow 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).

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at [date], and of its incoming resources and application of resources, including 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 charitable company 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 charitable company'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 trustees with respect to going concern are described in the relevant sections of this report.

### Other Information

The other information comprises the information included in the trustees annual report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information contained within the annual report. 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. 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 course of 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 this gives rise to a material misstatement in the financial statements themselves. 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.

### Opinions on other matters 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' report (incorporating directors' report) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- 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 charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the directors' report.

We have nothing to report in respect of the following matters in relation to which 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 directors' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.

### Responsibilities of 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 the trustees 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 charitable company'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 charitable company or to cease operations, or have no realistic alternative but to do so.

### Auditor's 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 is detailed below:

We enquired the Management to obtain an understanding of the legal and regulatory frameworks that are applicable to the Charity. The most significant framework which are directly relevant to the Charity are the 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, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

We understood how the Charity is complying with those legal and regulatory framework frameworks by observing how the Management comply with the rules, the culture of honesty and ethical behaviour and whether a strong emphasis is placed on fraud prevention, which may reduce opportunities for fraud to take place, and fraud deterrence, which could persuade individuals not to commit fraud because of the likelihood of detention and punishment.

We assessed the susceptibility of the Charity's financial statements to material misstatements, including how fraud might occur by discussing with the Management to understand where it considered there was susceptibility to fraud. We evaluated management's incentives and opportunities for fraudulent manipulation of the financial statements (including the risks of override of controls) and management bias in accounting estimates. We also considered performance targets and their influence on efforts made by management to manage earnings or influence the perceptions of analysts. We considered the programmes and controls that the Charity has established to address risks identified, or that otherwise prevent, deter, and detect fraud, and how senior management monitors those programmes and controls. Where the risk was considered to be higher, we performed audit procedures to address each identified fraud risk. We evaluate whether the Charity's COVID-19 working environment, especially remote working, may increase the inherent risk of fraud.

Based on this understanding our we designed our audit procedures to identifying the risks of material misstatement in respect of irregularities, including fraud and non-compliance with laws and regulations, was as follows:

- We identified the laws and regulations applicable the Charity through discussions with the management and from our technical and commercial knowledge and experience of Charity Sector.
- We assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and inspecting legal correspondence.
- Making enquiries of management as to whether they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud.
- Enquiring of management as to actual and potential litigation and claims.
- Identified laws and regulations were communicated to the Statutory Senior Auditor regularly and remained alert to instances of non-compliance throughout the audit.
- Identifying and testing journal entries, with focus on manual journals and journals indicating large or unusual transactions based on our understanding of the Charity, journals posted during unusual times or posted by senior management.
- We focus on specific guidance of the SORP e.g. income recognition.
- Review of correspondence and agreements with donors and enquiries with the management.
- Reviewing minutes of meetings of those charged with governance.
- Challenging assumptions and judgments made by management in their significant accounting estimates, in particular, in relation to their going concern review.
- Reviewing financial statement disclosures and testing to supporting documentation to assess compliance with applicable laws and regulations.

- Reviewing budget and cash flow forecast.
- Investigate any unusual or unexpected relationships identified from analytical procedures.
- Considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.
- Reviewing trustee's approval of salary increments & bonus payments and contract of employments to identify any fraudulent payments or bogus employees.
- Review any potential evidence that the Charity may have received Covid 19 Government support schemes which may have not disclosed to us.

The Senior Statutory Auditor reviewed the experience and expertise of the engagement team to ensure that the team had the appropriate competence and capabilities, which included the use of experts where appropriate to carry out the above audit procedures.

The objectives of our audit, in respect of fraud, are to identify and assess the risk of material misstatement of the financial statement due to fraud; to obtain sufficient appropriate audit evidence regarding the assessed risks of material misstatement due to fraud, through designing and implementing appropriate responses, and to respond appropriately to fraud or suspected fraud identified during the audit. However, the primary responsibility of the prevention and detection of fraud rests with both those charged with governance of the Charity and management.

A further description of our responsibilities is available on the Financial Reporting Council's website at: <https://www.frc.org.uk/Our-Work/Audit/Audit-and-assurance/Standards-and-guidance/Standards-and-guidance-for-auditors/Auditors-responsibilities-for-audit/Description-of-auditors-responsibilities-for-audit.aspx>. This description forms part of our auditor's report

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.<sup>4</sup>

#### **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 charitable company'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 charitable company and the charitable company's members as a body, for our audit work, for this report, or for the opinions we have formed.



Adam Shelley FCCA  
(Senior Statutory Auditor)

For and on behalf of Sobell Rhodes LLP  
Statutory Auditors and Chartered Accountants  
The Kinetic Centre  
Theobald Street  
Elstree  
Borehamwood  
Hertfordshire  
United Kingdom  
WD6 4PJ

27 September 2021

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Statement Of Financial Activities  
Including Income And Expenditure Account  
for the year ended 31 December 2020**


	Note	Unrestricted Funds £	Restricted Funds £	Permanent Endowment Fund £	Total Funds 2020 £	Total Funds 2019 £
<b>Incoming and endowments from:</b>						
Donations and legacies	2	260,908	-	-	260,906	123,804
Investments	3	110,681	-	-	110,681	153,347
Charitable activities	4	262,216	260,815	-	522,831	420,949
<b>Total income and endowments</b>		<b>633,803</b>	<b>260,815</b>	<b>-</b>	<b>894,418</b>	<b>698,100</b>
<b>Expenditure on:</b>						
Cost of generating funds:						
Raising funds		106,905	-	-	106,905	125,644
Charitable activities		426,951	282,611	22,928	732,490	612,259
<b>Total expenditure</b>	5	<b>533,856</b>	<b>282,611</b>	<b>22,928</b>	<b>839,395</b>	<b>737,903</b>
Investment return: net of realised and unrealised (gains)/losses	14	-	-	(28,953)	(28,953)	277,167
<b>Net income/(expenditure)</b>	8	<b>99,947</b>	<b>(21,996)</b>	<b>(51,881)</b>	<b>26,070</b>	<b>237,364</b>
Transfer between funds	19	(21,996)	21,996	-	-	-
<b>Net movement in funds</b>		<b>77,951</b>	<b>-</b>	<b>(51,881)</b>	<b>26,070</b>	<b>237,364</b>
<b>Reconciliation of funds:</b>						
Total funds brought forward		352,393	-	2,727,766	3,080,149	2,842,785
<b>Total funds carried forward</b>	20	<b>430,344</b>	<b>-</b>	<b>2,675,875</b>	<b>3,106,219</b>	<b>3,080,149</b>

All of the above results are derived from continuing activities. All gains and losses recognised in the year are included above.

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Balance Sheet**  
**Company Number: 894309 (England and Wales)**  
**as at 31 December 2020**

	Notes	2020		2019	
		£	£	£	£
<b>Fixed assets</b>					
Intangible assets	12		5,810		6,840
Tangible assets	13		20,469		8,821
Investments	14		2,751,598		2,793,384
			<u>2,777,877</u>		<u>2,808,625</u>
<b>Current assets</b>					
Debtors	15	58,783		16,181	
Cash at bank and in hand		<u>342,108</u>		<u>347,136</u>	
		<u>400,891</u>		<u>363,317</u>	
<b>Creditors: amounts falling due within one year</b>	16	(72,549)		(91,793)	
<b>Net current assets</b>			<u>328,342</u>		<u>271,524</u>
<b>Total assets less current liabilities</b>			<u>3,106,219</u>		<u>3,080,149</u>
<b>Net assets</b>	20		<u>3,106,219</u>		<u>3,080,149</u>
<b>Funds</b>					
General funds			280,344		352,393
Designated funds			150,000		-
Total unrestricted funds	17		<u>430,344</u>		<u>352,393</u>
Permanent endowment funds	18		2,676,876		2,727,766
Restricted funds	19		-		-
<b>Total funds</b>	20		<u>3,106,219</u>		<u>3,080,149</u>

These financial statements were approved by the Board of directors on ~~27~~ September 2021 and signed on its behalf by:

  
 Stephen Moss CBE  
 Chairman

  
 Michael Karp  
 Treasurer

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Statement of Cash Flow  
as at 31 December 2020**

	Note	2020 £	2019 £
<b>Net cash flow from operating activities</b>	21	<u>(108,160)</u>	<u>(170,552)</u>
<b>Cash flow from investing activities:</b>			
Payments to acquire tangible fixed assets		(19,796)	(4,425)
Income from investments		100,000	188,750
Payment of investment manager's fees		22,928	23,933
<b>Net cash flow from investing activities</b>		<u>103,132</u>	<u>188,258</u>
<b>Net increase / (decrease) in cash and cash equivalents</b>		(5,028)	17,706
<b>Cash and cash equivalents at 1 January</b>		347,136	329,430
<b>Cash and cash equivalents at 31 December</b>		<u>342,108</u>	<u>347,136</u>
<b>Cash and cash equivalents consists of:</b>			
Cash at bank and in hand		342,108	347,136
<b>Cash and cash equivalents at 31 December</b>		<u>342,108</u>	<u>347,136</u>

As there are no debts, the analysis of changes in net debts disclosure is not required.

**The Institute for Jewish Policy Research  
(A Company Limited by Guarantee)  
Notes to the Accounts  
for the year ended 31 December 2020**

**1 Summary of significant accounting policies**

***General information and basis of preparation***

The Institute for Jewish Policy Research is a company limited by guarantee registered in England and Wales. In the event of the Charity being wound up, the liability in respect of the guarantee is limited to £1 per member of the Charity. The address of the registered office is given in the Charity Information on page 1 of these financial statements. The nature of the charity's operations and principal activities are noted in the Report of the Directors.

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, the Companies Act 2006 and UK Generally Accepted Accounting Practice.

The financial statements are prepared on a going concern basis under the historical cost convention, modified to include certain items at fair value. The financial statements are presented in sterling which is the functional currency of the Charity and rounded to the nearest £1.

The significant accounting policies applied in the preparation of these financial statements are set out below. These policies have been consistently applied to all years presented unless otherwise stated.

***Funds***

Unrestricted funds are available for use at the discretion of the trustees in furtherance of the general objectives of the Charity and which have not been designated for other purposes.

Designated funds comprise unrestricted funds that have been set aside by the trustees for particular purposes. The aim and use of the designated funds are set out in the notes to the financial statements.

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.

Permanent endowment funds represent those assets which must be held permanently by the charity, principally comprising of investments. Income arising on the permanent endowment funds can be used in accordance with the objects of the Charity and is included as unrestricted income. Any capital gains or losses arising on the investments form part of the fund. Investment management charges and legal advice relating to the fund are charged against the fund.

***Income recognition***

All incoming resources are included in the Statement of Financial Activities (SoFA) when the Charity is legally entitled to the income after any performance conditions have been met, the amount can be measured reliably and it is probable that the income will be received.

For donations to be recognised the Charity will have been notified of the amounts and the settlement date in writing. If there are conditions attached to the donation and this requires a level of performance before entitlement can be obtained then income is deferred until those conditions are fully met or the fulfilment of those conditions is within the control of the Charity and it is probable that they will be fulfilled.

**The Institute for Jewish Policy Research**  
**(A Company Limited by Guarantee)**  
**Notes to the Accounts**  
**for the year ended 31 December 2020**

**1 Summary of significant accounting policies** *(continued)*

For legacies, entitlement is the earlier of the charity being notified of an impending distribution or the legacy being received. At this point income is recognised. On occasion legacies will be notified to the charity however it is not possible to measure the amount expected to be distributed. On these occasions, the legacy is treated as a contingent asset and disclosed.

Income from performance related grants are recognised at fair value when the Charity has entitlement after any performance conditions have been met, it is probable that the income will be received and the amount can be measured reliably. If entitlement is not met then these amounts are deferred.

Investment income is earned through holding assets for investment purposes such as shares and property. It includes dividends and interest. It is included when the amount can be measured reliably. Interest income is recognised using the effective interest method and dividends are recognised as the charity's right to receive payment is established.

No amount is included in the financial statements for volunteer time in line with the SORP (FRS 102). Further detail is given in the Trustees' Annual Report.

***Expenditure recognition***

All expenditure is accounted for on an accruals basis and has been classified under headings that aggregate all costs related to the category. Expenditure is recognised where there is a legal or constructive obligation to make payments to third parties, it is probable that the settlement will be required and the amount of the obligation can be measured reliably. It is categorised under the following headings. Note 5 should be referred to for details of the nature and cost involved:

- Costs of raising funds
- Expenditure on charitable activities
- Other expenditure represents those items not falling into the categories above.

Support costs are those that assist the work of the Charity but do not directly represent charitable activities and include office costs, governance costs and administrative payroll costs. They are incurred directly in support of expenditure on the objects of the charity. Where support costs cannot be directly attributed to particular headings they have been allocated to costs of raising funds and expenditure on charitable activities on a basis consistent with use of the resources. Support costs detailed under note 5 are allocated on the basis apportionment of the time spent on these activities.

Costs of raising funds are those incurred in seeking voluntary contributions and do not include the costs of disseminating information in support of the charitable activities.

The analysis of these costs is included in note 5.

***Intangible assets***

Intangible fixed assets are measured at cost less accumulative amortisation and any accumulative impairment losses. Trade marks are written off over their useful life.

***Depreciation***

Tangible fixed assets are stated at cost (or deemed cost) or valuation less accumulated depreciation and accumulated impairment losses. Cost includes costs directly attributable to making the asset capable of operating as intended.

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**1 Summary of significant accounting policies** (continued)

Depreciation is provided on all tangible fixed assets, at rates calculated to write off the cost, less estimated residual value, of each asset on a systematic basis over its expected useful life as follows:

Leasehold improvements	over the term of the lease
Fixtures and equipment	25% straight line
Computers	33.33% straight line

**Investments**

Investments are recognised initially at fair value which is normally the transaction price including transaction costs. Subsequently, they are measured at fair value with changes recognised in 'net gains / (losses) on investments' in the SoFA if the shares are publicly traded or their fair value can otherwise be measured reliably. Other investments are measured at cost less impairment.

**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.

**Impairment**

Assets not measured at fair value are reviewed for any indication that the asset may be impaired at each balance sheet date. If such indication exists, the recoverable amount of the asset, or the asset's cash generating unit, is estimated and compared to the carrying amount. Where the carrying amount exceeds its recoverable amount, an impairment loss is recognised in the SoFA unless the asset is carried at a revalued amount where the impairment loss is a revaluation decrease.

**Provisions**

Provisions are recognised when the Charity has an obligation at the balance sheet date as a result of a past event, it is probable that an outflow of economic benefits will be required in settlement and the amount can be reliably estimated.

**Foreign currencies**

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.

**Leasing**

Rentals payable under operating leases are charged to the SoFA on a straight line basis over the period of the lease.

**Pensions**

The charitable company operates a defined contribution pension scheme. The assets of the scheme are held separately from those of the charitable company in independently administered funds. Contributions are charged to the Statement of Financial Activities as they become payable in accordance with the rules of the scheme.

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**1 Summary of significant accounting policies** *(continued)*

**Tax**

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.

**Going concern**

The financial statements have been prepared on a going concern basis as the trustees believe that there are no material uncertainties exist. Please see the Key judgement note below for further details.

**Key judgements**

The spread of COVID-19 virus since 31 December 2019 continues and the globe is currently experiencing a third wave. The pandemic has severely impacted many local economies around the globe. The charity sector is no exception. However the Directors believe that the Charity is a going concern and there are no material uncertainties after making the following judgement:

a) The trustees have considered the level of funds held and the expected level of income and expenditure for 12 months from authorising these financial statements. They believe there will be sufficient funds available to support the core costs of the Charity.

b) Since the discovery of the vaccines in mid November 2020 share prices continue to recover with the increasing speed of the vaccine roll out and level of stimulus provided by governments around the world continuing to support equity markets.

**2 Income from donations**

	Unrestricted Funds	Restricted Funds	2020 Total	2019 Total
	£	£	£	£
Donations	110,906	-	110,906	123,804
Legacy	160,000	-	160,000	-
	260,906	-	260,906	123,804

2019 income from Donations was £123,804 of which £2,750 was attributable to restricted funds and the balance of £121,054 was attributable to unrestricted funds.

**3 Income from Investments**

	Unrestricted Funds	Restricted Funds	2020 Total	2019 Total
	£	£	£	£
General bank interest receivable	588	-	588	1,092
Income from MCA permanent endowment fund	110,115	-	110,115	152,255
	110,681	-	110,681	153,347

2019 income from Investments was £153,347 of which all the income was attributable to unrestricted funds.

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**4 Income from charitable activities**

	Unrestricted Funds	Restricted Funds	2020 Total	2019 Total
	£	£	£	£
Research projects and sales of reports	262,216	260,616	522,831	420,949
		(note 19)		

2019 Income from Charitable Activities was £420,949 of which £186,800 was attributable to restricted funds and the balance of £234,149 was attributable to unrestricted funds.

**5 Total expenditure**

	Activities Undertaken Directly	Support Costs	2020 Total
	£	£	£
<b>Costs directly allocated to activities:</b>			
Fund raising for donations	69,203	37,702	106,905
Research project costs	263,789	26,822	290,611
Lectures and seminars	24,537	2,872	27,409
Research and organisational development costs	309,629	115,713	425,342
	<u>657,158</u>	<u>185,109</u>	<u>839,395</u>

The following are the support costs allocated to activities:

	2020 Total £
Bad debts	750
Database	2,156
Staff costs	61,929
Premises	51,856
General office costs	29,163
Depreciation and leasehold amortisation	7,948
Bank charges and exchange rate difference	(128)
Legal and professional	6,509
Investment manager's fees	22,928
Auditor's remuneration	11,168
Amortisation of trade marks	830
	<u>185,109</u>

The total support cost attributable to charitable activities is apportioned pro rata to the time spent on each charitable activity. The Trustees have decided to meet some of the governance costs example audit fees from unrestricted funds and so no allocation or charge is made to restricted funds.

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**5 Total expenditure**

The total expenditure for the year ended 30 December 2019 are as follows:

	Cost of Raising Funds	Expenditure on Charitable Activities: research, publications, meetings & dissemination	2019 Total
	£	£	£
<b>Costs directly allocated to activities:</b>			
Fund raising for donations	87,542	-	87,542
Research project costs	-	229,307	229,307
Lectures and seminars	-	27,060	27,060
Website and IT costs	-	10,927	10,927
Database	-	2,046	2,046
<b>Support costs allocated to activities:</b>			
Staff costs	8,555	78,995	85,550
Premises	4,947	44,527	49,474
Research and organisational development costs	16,284	146,552	162,836
General office costs	3,048	27,428	30,476
Depreciation	221	1,968	2,209
Bank charges and exchange rate difference	237	2,134	2,371
Legal and professional	1,023	9,206	10,229
Investment manager's fees	2,383	21,540	23,933
Auditor's remuneration	1,311	11,802	13,113
Amortisation	83	747	830
	<u>125,844</u>	<u>612,259</u>	<u>737,903</u>

Allocation of expenditure according to funds:

	2020 Total	2019 Total
	£	£
Unrestricted funds	533,856	481,912
Restricted funds (note 19)	282,611	232,058
Permanent endowment funds	22,928	23,933
	<u>839,395</u>	<u>737,903</u>

**The Institute for Jewish Policy Research  
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**6 Governance costs**

	2020 Total £	2019 Total £
Legal and professional	6,509	10,229
Auditor's remuneration	11,188	13,113
	<u>17,677</u>	<u>23,342</u>

**7 Auditor's remuneration**

	2020 Total £	2019 Total £
Audit of the Charity's annual accounts	7,607	9,179
Other services - preparation of the Charity's annual accounts	3,681	3,934
	<u>11,188</u>	<u>13,113</u>

**8 Net Income/(expenditure)**

This is stated after charging:

	2020 £	2019 £
Depreciation	7,948	2,209
Auditor's remuneration	11,188	13,113
Operating lease rentals	43,470	43,470
Investment return: net of realised and unrealised (gains)/losses	28,953	(277,187)
Amortisation	830	830
	<u>830</u>	<u>830</u>

**9 Trustees' remuneration and key management personnel remuneration and expenses**

None of the trustees received remuneration for their services nor did they receive any reimbursement of expenses during the year.

The key management personnel comprise the Executive Director and the Director of Operations. The total employee benefits of the Executive Director and the Director of Operations were £218,459 (2019 £211,731).

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**10 Staff costs and employee benefits**

	2020	2019
	£	£
Wages and salaries	488,286	394,306
Social security costs	51,837	44,898
Pension costs (see note 11)	28,788	24,726
	<u>566,911</u>	<u>463,930</u>

The number of employees who received total employee benefits (excluding employer pension costs of more than £60,000) are as follows:

	2020	2019
	Number	Number
£60,001 - £70,000	1	1
£70,001 - £80,000	-	-
£80,001 - £90,000	2	1
£90,001 - £100,000	-	-
£100,001 - £110,000	-	-
£110,001 - £120,000	1	1
	<u>1</u>	<u>1</u>

The average number of employees during the year was:

	2020	2019
	Number	Number
Average number of employees	<u>9</u>	<u>8</u>

**11 Pension costs**

The charitable company operates a contributory pension scheme. It is a defined contribution scheme and contributions are charged in the statement of financial activities as they are paid. The charge for the year was £29,202 (2019 £24,726) and the liability outstanding at the year end was £896 (2019 £1,424).

**12 Intangible assets**

Trademarks:

	£
<b>Cost</b>	
At 1 January 2020	8,300
Additions	-
At 31 December 2020	<u>8,300</u>
<b>Amortisation</b>	
At 1 January 2020	1,680
Provided during the year	830
At 31 December 2020	<u>2,490</u>
<b>Net book value</b>	
At 31 December 2020	<u>5,810</u>
At 31 December 2019	<u>6,640</u>

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**13 Tangible fixed assets**

	Improvement to leasehold building £	Fixtures and fittings £	Computer equipment £	Total £
<b>Cost</b>				
At 1 January 2020	34,959	2,604	15,452	53,015
Additions	17,449	-	2,347	19,796
At 31 December 2020	<u>52,408</u>	<u>2,604</u>	<u>17,799</u>	<u>72,811</u>
<b>Depreciation</b>				
At 1 January 2020	33,561	2,359	8,474	44,394
Charge for the year	1,883	245	5,820	7,948
At 31 December 2020	<u>35,444</u>	<u>2,604</u>	<u>14,294</u>	<u>52,342</u>
<b>Net book value</b>				
At 31 December 2020	<u>16,964</u>	<u>-</u>	<u>3,505</u>	<u>20,469</u>
At 31 December 2019	<u>1,398</u>	<u>245</u>	<u>6,978</u>	<u>8,621</u>

**14 Fixed assets investments in MCA permanent endowment fund**

	2020 £	2019 £
Fair value brought forward	2,793,364	2,558,625
Investment return: dividends and interest	110,115	152,255
Investment return: income paid out	(100,000)	(168,750)
Investment management costs	(22,928)	(23,933)
Investment return: net of realised and unrealised losses.	(28,953)	277,167
Fair value carried forward	<u>2,761,598</u>	<u>2,793,364</u>
Historical cost	<u>2,217,087</u>	<u>2,283,385</u>
Investments at fair value comprised:		
Equity shares	2,239,978	2,242,502
Fixed interest securities	392,726	218,192
Cash deposits/funds	86,410	229,640
Property funds	32,484	103,030
	<u>2,761,598</u>	<u>2,793,364</u>

The fair value of listed investments is determined by reference to the quoted stock market price at the balance sheet date. Other investments are measured using the following methods:

- a) UK government securities using the London Official Bid & Ask price to calculate the mid-price.
- b) Unlisted and suspended securities at a zero value.

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**14 Fixed assets investments in ICA permanent endowment fund**

*(continued)*

c) Securities in liquidation using the most recent and reliable valuations available. The most reliable valuation may include using Aberdeen Standard Capital's best price estimates.

d) Unlisted Floating Rate Notes valued at face or nominal value.

e) Investments with extended settlement periods (e.g. hedge funds, placings and some unit trusts) use the latest available Net Asset Value.

f) All values provided are as at the close of business on the valuation date. If the valuation date falls on a non-business day, the prices quoted will be those as at the close of business on the last business day before the valuation date. In some instances, the price quoted for certain holdings may be the last price received prior to the valuation date.

**15 Debtors**

	2020	2019
	£	£
Trade debtors	300	1,200
Prepayments	5,268	1,738
Other debtors	30,890	13,248
Accrued restricted project income	22,325	-
	<u>58,783</u>	<u>16,181</u>

Other debtors includes £7,587 (2019 £nil) falling due after one year.

**16 Creditors: amounts falling due within one year**

	2020	2019
	£	£
Trade creditors	4,487	3,811
Accruals	12,058	19,580
Deferred unrestricted project income	-	10,417
Deferred restricted project income (note 19)	43,483	35,148
Other taxes and social security costs	-	13,715
Other creditors	12,523	9,122
	<u>72,549</u>	<u>91,793</u>

**17 Unrestricted funds**

	£
At 1 January 2020	352,393
Income	833,803
Expenditure	(533,856)
Transfer to restricted fund (note 19)	(21,996)
At 31 December 2020	<u>430,344</u>

£150,000 is designated for Project: Study of Antisemitic Attitudes. These funds are expected to be utilised in 2021.

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**18 Permanent endowment funds**

	At 1 January 2020	New Designation	Utilised	At 31 December 2020
	£	£	£	£
MCA permanent endowment fund	2,727,766	-	(51,881)	2,675,875

The charitable company has restricted rights over the capital. It is entitled to the total income, realised and unrealised gains, in any financial year provided these do not exceed 8% of the original grant (£3,466,337) adjusted for inflation.

The MCA Endowment Fund is a separate fund for the purpose of promoting and assisting the organising and carrying out of research into the state of the contemporary Jewish communities in the UK and elsewhere in Europe together with the promotion of other charitable aims, objects and activities of the Charity as shall be conducive to the implementation of these purposes. The income of the Fund may be spent by the Charity on a year to year basis as long as the total of the income and gains spent in any one year does not exceed 8% of the Original Grant (\$5,000,000, converted to £3,466,337 at the date transferred) as increased in accordance with the United Kingdom Retail Prices Index ("RPI").

In order for capital to be spent it is necessary to satisfy two conditions:

- (1) The first condition is that the total amount of income and gains spent in any full financial year of the Charity must not exceed 8% of the Original Grant as increased by the percentage increase, if any (ignoring any reduction) in RPI, from the beginning of the financial year.
- (2) The second condition is that 30 days before the trustees resolve to spend the capital, the market value of the capital of the Fund must be not less than the Original Grant (increased in accordance with RPI) after excluding the gains resolved to be spent.

It is possible to carry forward the unspent part of the 8% and spend it in subsequent financial years in addition to the 8% limit for each year.

The Fund is invested on professional advice in order to obtain the maximum long-term total return (net of any tax) which is regarded from time to time as a prudent target for the Fund.

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**19 Restricted funds**

	At 1 January 2020 £	Incoming Resources £	Resources Expended £	Transfer (to)/ from unrestricted funds £	At 31 December 2020 £
<b>Total projects and commissions</b>					
Project: European Jewish Demography Unit	-	121,107	(121,107)	-	-
Project: European Jewish Research Archive	-	16,319	(28,620)	12,301	-
Commission: European Union Agency for Fundamental Rights (FRA)	-	-	(1,713)	1,713	-
Commission: Kaplan Centre for Jewish Studies and Research, UCT	-	30,000	(40,561)	10,561	-
Commission: Jewish Blind and Disabled (JBD)	-	2,705	(2,705)	-	-
Commission: Lauder - School Places Vienna	-	2,720	(141)	(2,579)	-
Commission: JW3 Monitoring and Evaluation Project	-	3,666	(3,666)	-	-
Commission: Industrial Dwellings Society (IDS)	-	12,274	(12,274)	-	-
Project: Study of Antisemitic Attitudes	-	-	-	-	-
Project: UK Jewish Research Panel	-	71,824	(71,824)	-	-
<b>Total projects and commissions</b>	-	<b>260,616</b>	<b>(282,611)</b>	<b>21,996</b>	-

Analysis of project receipts:

	Deferred/ (Accrued) Income brought forward at 1 January 2020 £	Project receipts In the year £	Project Income recognised in the year £	Deferred/ (Accrued) Income carried forward at 31 December 2020 £
<b>Total projects and commissions</b>				
Project: European Jewish Demography Unit	18,829	117,600	(121,107)	15,322
Project: European Jewish Research Archive	16,319	-	(16,319)	-
Commission: European Union Agency for Fundamental Rights (FRA)	-	-	-	-
Commission: Kaplan Centre for Jewish Studies and Research, UCT	-	30,000	(30,000)	-
Commission: Jewish Blind and Disabled (JBD)	-	5,275	(2,705)	2,570
Commission: Lauder - School Places Vienna	-	2,720	(2,720)	-
Commission: JW3 Monitoring and Evaluation Project	-	3,165	(3,666)	(501)
Commission: Industrial Dwellings Society (IDS)	-	14,065	(12,274)	1,791
Project: Study of Antisemitic Attitudes	-	23,800	-	23,800
Project: UK Jewish Research Panel	-	50,000	(71,824)	(21,824)
	<b>35,148</b>	<b>246,626</b>	<b>(260,615)</b>	<b>21,158</b>

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**19 Restricted funds** *(continued)*

The aim and use of each restricted fund is as follows:

(a) Project: European Jewish Demographic Unit - Established in January 2019, JPR's European Jewish Demography Unit is dedicated to generating data about Jewish populations in Europe to help support community development across the continent. Currently supported by the Rothschild Foundation Hanadiv Europe, it is led by JPR Senior Research Fellow, Dr Daniel Staetsky, and chaired by the world's leading expert in Jewish demography, Professor Sergio Della Pergola.

(b) Project: The European Jewish Research Archive: supported by Rothschild Foundation Hanadiv Europe, this is a project to build and maintain an online free to access archive of research publications on contemporary European Jewish communities. The archive includes reports, articles and other relevant materials that draw on, or discuss, social research on European Jewish communities since 1990.

(c) Commission: European Union Agency for Fundamental Rights (FRA) - Young Jewish Europeans: perceptions and experiences of antisemitism. This is a study of the identities of young Jewish Europeans, with particular emphasis on how contemporary antisemitism is affecting them. Written by JPR for the European Commission and European Union Agency for Fundamental Rights (FRA), it is based on FRA data gathered and analysed by JPR/ipsos.

(f) Commission: South Africa Survey - In July 2018, the Isaac and Jessie Kaplan Centre for Jewish Studies and Research at the University of Cape Town commissioned JPR to carry out a national survey of the South African Jewish population, in order to generate new data to support community planning there. This study was the largest carried out on the South African Jewish population since 2005. The findings were published in April 2020.

(d) Commission: Jewish Blind and Disabled (JBD) - this study was designed to look at the socio-demographic characteristics and levels of disability among Jews living in Barnet, Hertsmere, Redbridge and Essex, as part of JBD's strategic review.

(e) Commission: Lauder - School Places Vienna - this project for the Lauder-Chabad school system in Vienna looked at projections of demand for Jewish school places in the city.

(f) Commission: JW3 Monitoring and Evaluation Project - this annual study is aimed at helping JW3 to monitor and evaluate the effectiveness of their work. It involves helping them to determine what they need to measure in view of their new strategic plan, advising them on how best to gather the required data, and then working with them to determine how best to use it for their purposes.

(g) Commission: Industrial Dwellings Society (IDS) - this project mapped the Jewish population and Jewish services (schools, synagogues, community organisations, shops, restaurants, etc.) in the immediate vicinity of specific sites to support IDS's future planning.

(h) Project: Study of Antisemitic Attitudes - first run by JPR together with Ipsos MORI in 2017, this survey, monitoring anti-Jewish and anti-Israel attitudes among the British population, was due to be repeated in 2020. However, due to restrictions imposed by the Covid-19 pandemic, the study was postponed to 2021.

(i) Project: UK Jewish Research Panel - an initiative designed to build and maintain a sample of Jews living across the UK who have agreed to respond to JPR surveys on a range of contemporary issues.

All the funds represent donations received and take into account the research costs incurred during the year.

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**20 Analysis of net assets between funds**

	Unrestricted funds	Restricted funds	Endowment funds	Total funds
	£	£	£	£
Intangible assets	5,810	-	-	5,810
Tangible assets	20,469	-	-	20,469
Investments	75,723	-	2,675,875	2,751,598
Current assets	357,408	43,483	-	400,891
Creditors: amounts falling due within one year	(29,066)	(43,483)	-	(72,549)
<b>Total net assets</b>	<b>430,344</b>	<b>-</b>	<b>2,675,875</b>	<b>3,106,219</b>

**21 Reconciliation of net expenditure to net cash flow from operating activities**

	2020	2019
	£	£
Net expenditure	26,070	237,364
Income from investments	(110,115)	(152,255)
Amortisation of intangible fixed assets	830	830
Amortisation and depreciation of tangible fixed assets	7,948	2,209
Investment return: net of realised and unrealised (gains)/losses	28,953	(277,167)
(Increase) in debtors	(42,602)	(6,423)
(Decrease) / increase in creditors	(19,244)	24,890
<b>Net cash flow from operating activities</b>	<b>(108,160)</b>	<b>(170,652)</b>

**22 Leasing commitments**

At the year end the company had annual commitments under a non-cancellable property lease as set out below:

	2020	2019
	£	£
within one year	14,404	-
within two to five years	168,803	-
Later than five years	179,212	-
<b>Total leasing commitments</b>	<b>360,419</b>	<b>-</b>

**23 Financial Commitments**

Contractual commitments for the refurbishment work for the office contracted for but not provided in the financial statements amounted to £54,375 (2019: £nil).

**24 Share capital and controlling parties**

The company is limited by guarantee and has no share capital. The liability of its members is limited to £1 per member.

**25 Related party transactions**

There are no related party transactions during the year (2019: £nil).

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**26 Subsequent event**

The Covid-19 pandemic developed rapidly during 2021. The highly contagious nature of this virus required governments to put in place restrictions aiming to reduce its spread among the general population. These restrictions directly impacted on a large portion of the Charity's operation during 2021.

Details of Impact of Covid 19 on the Charity and the measures taken by the Directors are explained in detail in the Director's Report.

In the United Kingdom the majority of the legal social restrictions ended on 19 July 2021. Even though 19 of July was hailed by the Government as the 'freedom day' there are still general unease across all sectors and it is unknown how this lifting of restrictions will have an impact on the economy which may have a direct impact on the operations of the Charity.