LJWB
SINCE 1878
positively changing lives

# Annual Report

## 1st April 2024 – 31st March 2025


## Positively Changing Lives

**Registered number: 02923217**

**Charity number: 1041257**

## Contents

# Legal and Administrative Information

## Trustees

## Company Registered Number

02923217

## Charity Registered Number

1041257

## Registered Office

Marjorie and Arnold Ziff Community Centre, 311 Stonegate Road, Leeds, LS17 6AZ

## Chief Executive Officer and Company Secretary

E Bradbury

## Auditor

BHP LLP, 1st Floor, Mayesbrook House, Leeds, LS16 6QF

## Bankers

Barclays, 24 -26 Market Place, Wetherby, LS22 6NF

## Investment Advisors

Rathbones Investment Management, 8 Finsbury Circus, London, EC2M 7AZ

# Trustees' Report

## Chair's Reflections

As we reflect on the past year, we do so against a backdrop of unprecedented challenges. We have witnessed a significant increase in demand for our services, coupled with escalating costs driven by rising National Insurance contributions, ongoing building maintenance and energy costs, and the growing need for robust security measures. These pressures have placed considerable strain on our organisation, both operationally and financially. Never before have we had to draw down materially on our reserves to continue to provide services.

In response, we have embarked on a comprehensive programme of review and reform to ensure that our services remain sustainable, relevant, and responsive to the community's evolving needs. Our aim is clear: to secure a future in which we are still here, delivering vital support, for another 145 years—should the community need us.

As statutory services continue to face extreme pressures, with many individuals unable to access the help they need, we have stepped in to provide a broader range of support than ever before. This expansion has only been possible thanks to our dedicated team of staff, whose flexibility and unwavering commitment have been nothing short of extraordinary. Many work well beyond their contracted hours to ensure that the community receives the support it deserves and that people feel safe, cared for, and valued.

I am especially proud of the results of the Jewish Leadership Council (JLC) survey, which illustrates that our staff feel supported. This is a testament to the culture of compassion and care that underpins all that we do. Our scores demonstrated that we outperform in almost every area above other Jewish charities and we are an organisation that cares for the people who care for our community.

Our work is also made possible by over 250 volunteers, who continue to give so generously of their time. Without their efforts, many of our vital services simply could not be delivered. They are the backbone of our community engagement, and their contribution cannot be overstated or acknowledged enough.

This year saw LJWB take on kosher catering — an area we had hoped to outsource to a suitable provider. Unfortunately, we were unable to identify an external partner who could meet the community's needs, and as a result, we had no option but to bring the service back in-house. This decision has required significant resource to both stabilise operations and begin the process of cost reduction and modernisation. Leeds Kosher Kitchen CiC service remains under development, but we are making steady progress and have great customer feedback. Looking ahead, we face some of our toughest challenges yet. We are currently undertaking in-depth business reviews across the organisation as we work to reduce a financial gap of £400,000. Our focus remains firmly on ensuring that our services are effective, relevant, and financially sustainable. We want to meet the needs of today's community while planning carefully for tomorrow.

While we are incredibly fortunate to have an amazing donor pool, we have seen a reduction in donations as many of our supporters are also feeling the impact of the cost-of-living crisis. We are immensely grateful for all contributions, large or small, which enable us to continue our vital work.

More than ever, our services are relied upon by individuals whose families live outside of Leeds, sometimes far afield in London, Manchester, Spain, Israel, and the USA. Our presence here offers their loved ones the reassurance that someone is nearby, offering practical help, trusted support, and much-needed companionship.

We continue to ask: *Will you help us care?* Your support—whether as a donor, a volunteer, or an advocate—enables us to be here, to serve, and to care, now and into the future.

On behalf of the Board of Trustees, thank you to every staff member, volunteer, donor, and supporter who makes our mission possible. Together, we are building a community that cares deeply and acts decisively.

Elizabeth Bradbury – CEO (L)　　　　Helen Lewis – Chair (R)

Helen Lewis

~~Signer ID: MWQCFECOFH...~~ ----------

Helen Lewis, Chair of the Board

17th November 2025

# Objectives, Vision, Mission, and Values

In January 2025 we undertook a piece of work to ensure that our objectives, values and vision are still relevant to the community we support, our staff and volunteers. As a result of this work, we have updated our values and key organisational behaviours which guide our work and decision making.

## Our Objectives

"…to provide, with particular regard to the Jewish community, care services to those in need of assistance by reason of poverty, hardship, distress, infirmity or old age in Leeds and Yorkshire and district and generally to relieve and improve the social and physical condition of the Jewish population in the area of benefit."

## Our Vision

Positively changing lives. Our mission is to provide relevant and responsive care, support, and activities for all ages in our locality.

## Our Values

1. Working closely with our residents, customers, locality and service users to understand and respond to their needs

2. Caring for others and the environment

3. Treating people with respect

4. Using resources effectively and efficiently


## Update On 2024 - 2025 Targets and Strategic Plans

At LJWB we can't and won't stand still in our service offering, reacting to service demand and funding.  This year has been no different and we are facing considerable financial challenges once again.  This is akin to many other charities and businesses who are seeing the wider effects of the implementation of significantly higher national insurance and statutory minimum wage levels, increased IT and data management requirements / costs, utilities and mandatory health and safety stipulations.

| We said | We did |
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| **Income**<br><br>Maintaining income levels against target for all fundraising activities | Continued to carry out community-based fundraising focused on major campaigns through the year. Proactively reviewing fundraising strategies and approaches to meet the drop in the number of donations and value of donations. |
| **Strategic plan**<br><br>Reflecting upon our vision and values to ensure that they remain relevant to our charitable purpose and community need | Funding received from West Yorkshire Business Boost has supported Trustees and SLT to look at our values and vision for the future.  Outputs from these sessions have included communication styles, revised values and vision, pillars of success and conversations about the purpose of LJWB. |

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| **Recruiting and maintaining appropriate and well qualified staff in all services**<br><br>JLC Staffing survey<br><br>Maintain training for our care staff against national requirements | We benchmark all our salaries to ensure that we remain competitive to attract the best. Leeds is a competitive recruitment market, but our reputation and support of staff has helped us to meet the demands of our service.<br><br>In this year's JLC survey LJWB scores consistently higher than comparative organisations. We are particularly proud of our results in the areas of staff wellbeing, feeling valued and 85% of respondents saw themselves working for us over the next 2 years.<br><br>We continue to invest heavily in training our registered care staff and they have undertaken many hours of training, field observations, and practical exercises to be a highly professional and competent team. |
| **Registered care**<br><br>Maintain Good CQC rating<br><br>Maintain income levels | All LJWB services are rated as Good by CQC.<br><br>Despite a number of voids and lower than anticipated hours in Moorcare we have been able to continue to run financially viable care services. |
| **Retendering contracts**<br><br>Telephony | The telephony contract was retendered, and this project is now complete providing additional functionality, reporting and maximising use of technology. Financial saving achieved. |
| **Café, restaurant, and food**<br><br>Ensuring through our charitable purposes that there is a kosher food offering from the MAZCC | Leeds Kosher Kitchen has had a number of challenges recruiting staff owing to the very competitive market in Leeds and specialist nature of our provision. Despite the challenges we have been able to maintain a kosher food offer from the MAZCC and are working hard on developing services to continue to nourish the community. LJWB has funded LKK considerably in the past year to maintain a supervised kosher food offering to the community. |

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| **Kosher Community pantry (foodbank)** | We have been able to fund the kosher community pantry for another year with support from Astonish, Gourmet and Street Lane Bakery. |
| **Environmental improvements in our residential care homes for people with a Learning Disability** | We have completed the refurbishment works across all 3 homes which provide modern environments for our residents.<br><br>In line with changing statutory requirements we are upgrading fire management systems, and this work will continue into the next financial year. |
| **Installation of a digital social care record (DSCR) in our residential care homes for people with a Learning Disability** | A new DSCR with funding support is being rolled out across the 3 houses which will provide enhanced care recording, evidence for audits and CQC inspections. |

## Key Actions For 2025 - 2026:

- In depth financial three-year recovery plan
- Consolidation of intercompany loans with LJHA
- Review and replacement of HR and training system
- Review and replacement of facilities management system
- Tender for the replacement of Moorcare Electronic Social Care Record following incumbent provider being sold
- Review of cost savings re: utilities cost
- In-house management development programme
- Restructure of Community Engagement and Inclusion team

## Community Support Services

Our Community Support team has evolved over the past year with new appointments to reflect the increased demand and needs of our community. In March 2025 a new Head of Community Support and Activities commenced in post, following a restructure within the organisation. We are currently recruiting for an Activities Co-ordinator, a new development and delivery role to enhance and expand our activities programme across all the age ranges. The Dementia Support Worker and the Care Facilitator roles funded by residual Donisthorpe Hall funds are now fully embedded in the team and are both undertaking extensive one to one support and running well attended groups for service users and their carers carrying caseloads on average of 20 and 29 people respectively.

The expansion of the team has meant we have been able to support more people who reach out to us for advice and assistance. We have noted a 27% increase in enquiries, leading to a comparative increase in case working. We are now providing one to one support for 293 people in total, with 70 attending the therapeutic groups the team deliver. Over the past year we note that people referred to our service have increasingly diverse and complex needs, a significant factor being the cost-of-living crisis, which has impacted everyone, but especially the most vulnerable and poorest people in our community. Although the North Leeds area, including Moortown is one of the most affluent in the city, our experience over the past year is that many people are now experiencing financial challenges, leading to an increase in anxiety and depression, which has a significant impact on all aspects of their life including mental and physical health.

The aftermath of the 7th of October attacks in Israel in 2023, the ongoing war in Gaza, the current political climate and the increase in antisemitism and threat levels towards the Jewish community have resulted in people feeling unsettled, and to varying degrees anxious and low. People have responded to the events themselves and the ongoing situation in a multitude of ways, but with an increase in reports of antisemitism, threats and attacks it is unsurprising that over the last year demand specifically for mental health support has increased, with people reporting they feel increasingly isolated and have experienced antisemitism in the wider community. Being embedded in the heart of the Jewish community at such times is so important and over the past year we have developed some new groups at the MAZCC to enable people to feel connected and find support from others, staffed by our incredible volunteers as well as contact from our Community Support team.

## Overview of LJWB Mental Health Service Provision

The Community Support Service continues to provide a holistic support service to members of the local and wider community. The service addresses a varied range of mental health conditions and includes depression, anxiety, stress, schizophrenia, bipolar disorder, PTSD, hoarding behaviours, autism, ADHD, suicidal ideation and self-harm.

Statutory services have increased waiting times and a reduction in ability to access services. Additionally, the aftermath of the October 7th, 2023, attacks and the ongoing war in Israel and Gaza, has led to increased levels of anxiety and experiences of antisemitism has also impacted negatively on people's mental wellbeing and led to additional requests for support. the service has focused on strategies to implement improved service delivery and meet demand, including community engagement initiatives, staff training, group support and signposting where appropriate.

The service has seen a significant increase in demand with referrals showing an increase of 168%; we currently support 114 adults and 3 children with mental health needs. In addition to providing one to one support we also signpost individuals to more appropriate support. This increase, along with changes in staff, has necessitated the adoption of more sustainable working methods, such as drop-in support groups to manage the increased workload effectively.

In response to the increased demand for mental health services, the organisation has implemented several initiatives and are in the process of organising others. A weekly drop-in hub service has been introduced to enhance capacity and reach more individuals in need. Furthermore, a collaboration with LJHA has been established to facilitate a monthly men's group. This provides a safe environment for men to meet and discuss various topics, promoting community support and engagement. We are also in the process of supporting the re-established volunteer facilitated women's group.

The staff team currently consists of 2 full time adult wellbeing officers, 1 full time team leader and 1 staff member due to return from maternity leave in September 2025. The service is managed by the community support service and activities manager.

The importance of staff training and development remains and is ongoing. All members of the current team have completed Applied Suicide Intervention Skills (ASIST) training.

## Older Persons Service

The Older Persons Service at Leeds Jewish Welfare Board continues to play a vital role in promoting the health, dignity, independence, and positively changing lives of the older members of our community. Over the past year, the Older Person's Service has received 32 new referrals of people whom we support through a combination of one to one outreach visits, dementia support, sensory loss support, and support to transition from home/hospital to a care setting. Altogether we are supporting over 100 clients and their family members and carers. Alongside this we support individuals to access wellbeing activities to promote mental and physical wellbeing and avoid social isolation. Our aim has remained consistent: to ensure that older people remain socially connected, practically and emotionally supported, enabling them to access services tailored to their cultural and religious needs.

The focus is on person-centred support, maintaining dignity and independence, and enhancing quality of life through targeted interventions and collaborative approaches.

We continue to support service users to access healthcare and preventative care by promoting regular health checks, vaccinations and screenings.

With our restricted funding from Donisthorpe Hall we have been able to fund 2 posts supporting older people.

In these unique roles they support families to source appropriate care in the community for their loved ones considering their cultural and religious requirements. This can often require liaison with families out of area and overseas. They liaise effectively with discharge teams in the hospitals and negotiate best rates for care home provision whenever possible. They provide families with advice and guidance when they are feeling vulnerable and worried about their loved ones.

The Care Facilitator has been supporting 41 service users, families and carers to navigate the often-complex health and social care systems, focusing on ensuring a seamless transition from hospital to home or into an appropriate care setting, while remaining sensitive to cultural and religious needs within the community, liaising with Rabbis to ensure cultural and religious considerations are respected in care planning. Attending discharge planning meetings and supporting 14 assessments and applications for care packages of continuing healthcare.

Highlights this year from the team include the very successful ongoing weekly cognitive stimulation therapy group. We have delivered four blocks of a 12-week programme this year with 38 service users attending across the sessions. This includes the topics - my life, childhood games, let's budget, let's be creative, useful household tips, household items, quiz me, thinking outside the box, food tasting, slogans, sounds and forget me not.

They develop positive relationships with local care home providers and are establishing a portfolio of information on the different options available to people locally in terms of residential and nursing care. They also advise on care in the community through Moorcare or alternative providers if needed.

Monthly they facilitate a Carers group, where people can come together to offer each other peer support. There are approximately 8-10 people attending these sessions.

Through proactive support, staff were able to identify and respond to early signs of decline in individuals, helping to prevent hospitalisation or care breakdown. This included referrals for care needs assessments, GP's, Occupational Therapists and related healthcare professionals, as well as advocacy for additional health and housing support.

## Financial Support

We provide support to our service users to understand, access and claim the benefits they are entitled to, which plays a crucial role in promoting financial stability and overall wellbeing.

This year, we have supported 75% of service users with up-to-date information on a range of benefits including Attendance Allowance, Pension Credit, State Pension, Housing Benefit, Council Tax reduction, support to obtain NHS Continuing Health Care funding and financial assessments, alongside practical support to make these claims. The Older Persons Service has supported 6 service users struggling with hoarding issues and in need of decluttering assistance by applying for grants to fund the relevant professional help, giving practical support to create a safer, healthier living environment. Staff have worked sensitively, undertaking relevant training to ensure understanding of the emotional and psychological challenges associated with hoarding.

## Sensory Loss Support

Early identification of sensory loss is a priority. Staff observe and report any signs of hearing or vision deterioration and liaise with family members, carers, and health professionals to assess needs. Referrals to audiology and ophthalmology services are made when necessary. A person-centred care plan is then developed based on each client's unique requirements.

Sensory loss is a growing concern among older adults, often leading to reduced communication, social isolation, and increased risk of falls or depression. LJWB recognises the importance of early identification and tailored support to mitigate these risks and uphold our values of care, community, and dignity.

The participants visibly enjoy actively engaging in the activities and chatting with other participants. Feedback is overwhelmingly positive, with everyone expressing how enjoyable, stimulating and uplifting they find it. Several participants commented on feeling more connected and confident, while family members noted improvements in mood and alertness.

The Life Stories Project continues for its third year although there has been a noticeable decline in numbers participating. Several factors have contributed to this. Some individuals with dementia have limited recollection of materials to create a life story, in some cases reviewing these materials has caused distress especially if the content conflicts with their current perception of reality.

There have been 2 successful coffee afternoons which focused on reminiscence, togetherness and social inclusion for our Jewish Service users now residing in a care setting. Staff and residents from 2 care homes attended alongside members of the Jewish community. A special moment was when 3 ladies who were sitting next to each other discovered that they all attended the same primary school together, they enjoyed chatting to each other all afternoon. There were photograph albums of old Leeds, past celebrations and various Jewish Charity Events which was a great discussion point. Traditional cakes, Kuchens, Rugelach and Babkas were served and a well-stocked table full of raffle prizes were enjoyed. The event was well received with positive feedback given.

## Community Support for People with Learning Disabilities

We continue to provide one to one support to individuals with learning disabilities. The support is characterised by long term relationships with clients and their families, which have been developed over several years. The focus now is on adapting the support to meet the changing needs of clients, particularly as they age and face mobility challenges or difficulties in maintaining independent living and their tenancies. The Learning Disabilities Support worker maintains regular contact with 35 clients living in our community. They offer targeted individual support as required and make extensive efforts to assist clients with financial documents including Personal Independence Payments, Employment and Support

Allowance (ESA), Universal Credit applications, hospital passports and Herbert Protocol, both aimed at ensuring client safety and effective advocacy. Many service users still require significant support to negotiate the transition to Universal Credit, which was introduced in 2023.

We also continue to keep in regular contact with people through their attendance at our Inclusive Social groups which are held every 2 weeks, varying between daytime and evenings to maximise attendance. This provides a valued and valuable opportunity for peer support, social interaction and continued staff support, minimising the risks of social isolation by providing a consistent and regular mode of social engagement. This approach helps to foster a sense of community and ensures the service users' needs and preferences are regularly considered and implemented, successfully contributing to their overall wellbeing and independence. Activities are chosen by service users, demonstrating the importance of hearing clients' voices and respecting their wishes. Their preferences are always considered in the decision-making process. This year's events have included, cinema trips, theatre outings, dining out and visits to the coast. Collaborations with external organisations, the Friendship Circle in Manchester and Lev Tov Matching Service have been established to further enhance social and recreational opportunities. Plans are also in place to involve service users in the Beautiful Octopus Club, an arts and drama initiative hosted at Leeds Playhouse for people with additional learning needs. These events occur twice a year. Additionally, our Support Worker organises participation in Learning Disability week, which features a broad range of activities and interactions with other relevant agencies.

## Family Support and Children's Activities

LJWB's Children and Families team continue to deliver bespoke one to one and group-based activities to parents and / or children. Requests for our support is diverse and has included supporting parents experiencing domestic abuse, family relationships, interaction with the criminal justice system, sourcing housing and ensuring it is a safe and suitable place for children. We also support families in maximising their income through help in claiming benefits and work in partnership with families with children with Special Educational Needs and Disabilities to assist them to navigate the complexities of the SEND Pathway. Some of the parents we support also experience mental health challenges. In such cases, families are offered a mental health team member to support them, whilst our children and families' workers focus on the children's needs. We also continue to receive referrals for young people experiencing anxiety and following diagnoses of ADHD, which we note has increased due to heightened awareness and increased referrals by schools.

LJWB's Children and Families team welcomed a new member of staff in August 2024 as Early Years Activity Co-ordinator in our existing team.

The playroom has provided 4124 contacts over the last 12 months with individual children and family members, many of whom access the services daily, particularly during school holiday periods. These sessions provide fun and creative activities, with opportunities for outdoor play for under-fives and their parents and grandparents as well as helpful tips and advice regarding early years development, consistency, boundary setting and potty training.

Following feedback from families we introduced a new family baking session in the afternoons which enabled parents, carers and children to have a fun experience and enjoy eating the results at the end. This is helpful to family cohesion and an opportunity to educate families around nutrition and healthy eating.

**Support through the holidays:**

The 6 week summer holidays can be a difficult and challenging time for families, long days and bored children on a limited budget increases stress for families. To support families we ran 6 weeks of activities in the playroom / art room for children 0 – 11 and Inclusive activities on Tuesdays for children with SEND and their families.

Families on limited budgets could access sessions for free – and we kept prices low to ensure all members of the community could attend.

Families had the opportunities to befriend tarantulas and beetles as part of our creepy crawly session, paint pebbles and pat Betty the therapy dog – this provided children and adults who are anxious around dogs to learn how to reduce their anxiety. Hip Hop was enjoyed by the more energetic attendees and proved an excellent energy burner.

The cost-of-living crisis has continued to challenge families in the community. The generous donation once again from the Freemasons enabled us to provide a free cooked kosher 2 course meal after school for 11 families (average 132 meals) for 12 weeks and food for the Community Pantry was greatly appreciated.

Families said, "The food was a real help, money is tight, so this has been a real help" and "thank you it has been great to get together and eat out as a family "

Inclusive craft group and teatime club for families:

We have provided weekly sessions during the school term for 5 families (6 adults and 8 children) to attend a social group after school where they can eat, play, socialise together and support each other. Most of the children attending these sessions have additional needs.

Children can play and enjoy crafts supervised by staff – and parents can relax whilst sharing some of their challenges and successes as carers.

Families commented:

*"We love coming to the club, we do not feel judged, and our children love the opportunity to eat with other families – this is often a struggle as their behaviour can often be unpredictable and challenging. - staff are always very supportive and helpful "*

## Support for Families and Young People

Family support has been provided for parents and their children, some of whom were experiencing domestic abuse, challenging family relationships, re-housing and cost of living crisis. Debt management has also been a challenge for many. We have also seen an increase in support for young people struggling with anxiety and poor mental health.

Support for families with SEND (10 families) has increased as more children are being referred for ADHD and ASD assessments - NHS current wait time for assessment is 2 Years.

We have provided support for families through direct one to one support with the child or young person and worked with parents to provide strategies for managing their own behaviours and their child's behaviour.

Referrals to more specialised support Child and Adolescent Mental Health Services (CAMHS) (2 referrals) and Arm Cluster (2 referrals) have been made where appropriate.

Mental health - Provided one to one weekly support for 14 children and young people with poor mental health, self-harming behaviours and anxiety and support with transition to high school; 6 of these 14 people have ADHD or ASC.

Relationships with peers is an ongoing concern as some children have been negatively impacted by social media - they have felt isolated and have low self-confidence and self-esteem.

## Funding Secured by the Community Support Services Team

One of the primary focuses of our work is to ensure people are made aware of and supported to access all benefits to which they are entitled, including Pension Credits, Attendance and Carer's allowance and Personal Independence Payments. Over the past year the team has secured £184,000 in annualised benefits for people living in the community, including a further £25,000 in backdated payments. We have also applied for several grants to secure white goods, beds, carpets etc to ensure people have basic equipment in their homes and secured £18,000 to provide these through various grants and generous donations.

## Registered Care

Delivering high-quality registered care services presents significant challenges, particularly in a complex and tightly regulated environment. Ensuring compliance with Care Quality Commission (CQC) standards requires continuous staff training, robust governance, and rigorous quality assurance processes. Recruiting and retaining skilled care staff remains difficult amid sector-wide shortages and increasing demand, while rising operational costs — including staffing, utilities, and regulatory fees — further stretch limited resources. Balancing these pressures with the need to provide person-centred, dignified, and safe care places immense responsibility on LJWB who is committed to excellence.

Our registered care services are led by the CEO. In her role as Nominated Individual, she focuses on providing an oversight of compliance, support for the Registered Managers, and accountability across all levels of LJWB. She is supported by our Quality Assurance Lead, Head of Business Services, HR and Finance.

LJWB's dedicated registered care managers have all demonstrated clear leadership and full compliance with all CQC standards, while also fostering a culture of continuous improvement, openness, and transparency.

## Moorcare

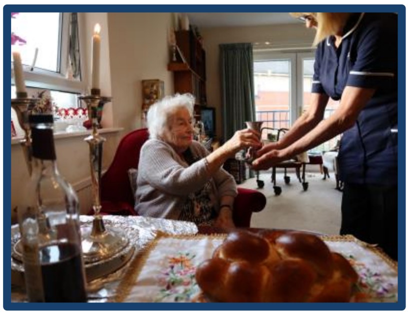
Moorcare has delivered 20,296 hours of care and support during 29,231 individual calls between April 2024 to March 2025.

58% of Moorcare clients are Jewish.

Over the last year Moorcare has seen a change within the office / operational team and our carer team, welcoming new employees. We have strengthened our working relationships with our clients and their support networks, and we are building our positive reputation within our local community, resulting in an increase in word-of-mouth referrals and with Leeds City Council packages.

We have recruited an experienced Registered Manager who has ensured a continued focus on staff support, client care and the management of this service. We do not yet have enough clients using the services of Moorcare to meet our budgeted plans. We require the support of the community to ensure that Moorcare is the first choice when thinking about care at home services and to understand better the reasons why this is not always the case.

The work of Moorcare is extremely varied, supporting clients with care needs, external visits, companionship, cooking and cleaning to name a few. We have helped to positively change lives, often working with people following a hospital discharge to regain independence and have the security of well trained, insured and supported carers to help them live their chosen life.




"It all starts with a cup of tea and a chat"

## Moorcare Compliments Received…

- *"Everything you do is greatly appreciated. Moorcare is an amazing service"*
- *"XXX, XXX, XXX are all pro-active staff, they are wonderful and ask me what I want instead of waiting for me to tell them or not asking at all…….they are amazing"*
- *"Moorcare and the carers are all so helpful and lovely. I am very grateful for all they do."*
- *"XXX is an asset to Moorcare, very composed and respectful"*

## Learning Disability Residential Care

LJWB operates homes in North Leeds for adults with learning disabilities. These 3 care homes are the only Jewish kosher residential care homes for adults with learning disabilities in Yorkshire. The staff in the homes work hard to ensure that individual residents have everything they need and live fulfilled lives with access to health, community and recreational activities.

It is important to note that no charitable funding is directed to support any of our registered care services and they remain funded through the provision of statutory services and privately funded contracts.

### Cranmer Scheme – Lynda Cohen House and Lily Thompson House

We have continued to focus on updating the homes this year, resulting in new furniture in the lounges and dining areas providing a modern homely feel and much needed additional storage, the residents were involved in picking the design and style of the new furniture and curtains, and are very proud of their new look homes. A new assisted bath has been fitted at Lynda Cohen House to meet the changing needs of the residents.

We have welcomed new residents and continue to work with the local authority to ensure the changing health and support needs of our individual residents are met, involving reassessments for additional 1:1 support hours and bespoke equipment to enable the residents to continue to live and engaging positively in every aspect of life. Voids in the homes have negatively impacted on the financial viability of the service but we are working hard with the local authority to ensure that the funding we receive from them continues to support this service and the financial demands which are placed on the running of high quality registered care services.

In the summer we hosted the Cranmer Olympic games with the residents, their family, friends and staff completing in various events such as racing, throwing and shooting (water pistols). The residents continue to engage in the inhouse activities such as baking and arts and crafts. Daytrips have included trips to Blackpool Zoo, Filey, the Thackray Medical Museum, and the theatre.

The staff have been working hard to develop their skills and knowledge, with several staff completing the Care Certificate and embarking on further training such as Tier 2 dementia training and person-centred approaches to adapt to the changing needs of the residents and demands in adult social care.

## Montague Burton House

The period between 1st April 2024 and 31st March 2025 has been a highly active and positive time at Montague Burton House, marked by significant improvements and continued progress. This success is a reflection of strong management systems, supported by the dedicated team at Leeds Jewish Welfare Board.

Montague Burton House is proud to have a deeply committed team whose passion and dedication are evident in the quality of support they provide to both residents and the wider service.

Following the refurbishment of their kitchen and dining room, we have completed further redecoration across the home - from the hallway to updates in residents' bedrooms. We also received new furniture and a TV for the lounge, along with the addition of a fireplace.

The home now feels truly modern and welcoming, creating a warm and comfortable environment for residents, staff, and visitors alike.

This refreshed setting has supported staff in delivering the best possible outcomes for residents, enhancing their quality of life and ensuring services remain well-organised and tailored to individual needs and preferences. Staff continue to receive regular training, both face-to-face and via e-learning, aligned with CQC requirements for care homes.

Montague Burton House residents and staff remain enthusiastic and ambitious when it comes to activities and well-being.  Residents continue to attend music shows, concerts, and explore new destinations for relaxation. They have visited a variety of parks across West Yorkshire, taken part in train and bus trips, and enjoyed outings to the Yorkshire Wildlife Park in Doncaster, the National Railway Museum in York, cinemas, theatres, and museums.  Social meals, home-hosted parties, and gardening - where they plant fruits and vegetables - are all part of their vibrant community life.

Looking ahead, we have exciting plans in place, including attending live football and rugby matches, which we hope will happen soon. We are also grateful for the fantastic events hosted at the MAZCC where our residents are always warmly welcomed with delicious snacks and lively entertainment.

Our residents also value time with their families, regularly celebrating meaningful occasions such as birthdays, Mother’s Day, and Father’s Day. We continue to honour and uphold our Jewish cultural traditions and celebrate all major Jewish festivals together.

# Strategic Report

## Our People

To deliver a broad range of services and activities, our headcount was 120 people in March 2025 (full-time equivalent of 78.2).

Contractual Agreements:

45% Full Time Contract
31% Part Time Contract
24% - Other Contract

Gender:

76% Female
24% Male

### Staff demographics vs Leeds Population

**(Leeds population: 85% white, 7.7% Asian, 3.5% Black, 2.7% Mixed race, 1.1% Other)**

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|---|---|
| White | 62.50% |
| Mixed/ Multiple Ethnic Groups | 3.90% |
| Asian | 3.10% |
| Black | 31.70% |

Of the statistics gathered regarding staff religion and belief, **12.5%** of employees identified as Jewish.

We continue to be committed to safe and effective recruitment and induction processes for all employees and volunteers. We follow Safer Recruitment processes and offer a full supervision, appraisal and training programme.

## Employee Survey 2024

We carried out an Employee Engagement Survey in 2024 in which we achieved a 68% response rate across all sites (5% higher than in 2023). Some of the highlights of the Employee Engagement Survey included:-

- ✓ 92% of our employees agree that they have access to the information that they need to do their job effectively
- ✓ 92% of our employees feel that they have clarity around what is expected to be done and by when
- ✓ 90% of our employees feel proud to work for LJWB
- ✓ 90% of our employees said that they have colleagues that they can turn to for additional support if needed
- ✓ 90% of our employees said that their manager treats them with respect and 89% of our employees said that their manager keeps them informed.

As an intensive people resource, recruiting, supporting, and engaging with our staff teams is vital for continuity of services. We are committed to providing mandatory and service specific training and this year provided training in a number of areas across the organisation, including Safeguarding; Data Protection; Mental Health First Aid; Food Hygiene and Infection Risk Management; Paediatric First Aid Training; Equality, Diversity, and Inclusion; and Dementia Awareness sessions, amongst many others.

We continue with our Learning Management System for our Registered Care Services. Recruiting and retaining our employees in a highly competitive marketplace is essential and we continue to provide a range of ongoing support activities to our people in line with best practice. This includes induction and welcome programmes for staff and volunteers; wellbeing and social events; Staff Forum; access to our employee assistance programmes, health and counselling services; invitations to attend internal and external training; and supervisions and appraisals.

Following on from the Staff Employee Survey 2023 we have extended the package with our Employee Assistance Programme to provide additional support to our staff team.

We have reviewed our organisational policies and procedures and updated them in line with statutory changes.

We have continued with our long service awards and also produce a Monthly Staff Newsletter for all staff.

In addition, we have reintroduced our Welcome Lunches for new starters, Wellbeing Lunches and Staff Breakfasts, and Learning Lunches to provide all employees with an update on organisational changes and continued learning opportunities.

Our Staff Forum continues to be a sounding board for new ideas, and they have recently introduced a 'You Said – We Did' Board, which provides organisational updates.

## Facilities and Health and Safety

Our in-house team kept all of our sites maintained and made sure that we remained compliant across all services, which includes our Safety and Compliance Officer completing regular audits across our sites.

The team completed regular checks including lighting, fire risk assessments and legionella. They also coordinate mandatory checks on equipment including lifts, baths, hoists, gas and electrical systems.

In addition, we have:-

- ✓ Introduced revised Invacuation and Evacuation Procedures
- ✓ We have developed an Environmental Sustainability Plan
- ✓ Trained staff in Fire Procedures and provided Fire Extinguisher Training

## Volunteering

Our staff and volunteers collectively undertake nearly 70 different roles and functions for LJWB (as defined by role profiles). Without our team of volunteers, we would not be able to run the range of activities, services, fundraising and events, and governance of the organisation. We are very proud of the work and dedication of our volunteers who work with us in so many areas which include in the MAZCC, within the community, in our Charity Shop, fundraising and including our Board and Committee members.

| | |
|---|---|
| Number of volunteers on register | 245 |
| Number of volunteers active | 235 |
| Total number of volunteering hours delivered | 14,652 |

Special volunteering projects and key achievements between April 2024 and March 2025 include:

**Telephone Support** - The Listening Line and Phone Buddy services are hugely successful, and volunteers receive the same training and guidelines. Nearly all the volunteers complete Mental Health First Aid training in-house annually. Nearly 20 service users receive telephone support and over 130 hours of phone calls are made each month.

**Community Volunteering** - We continue to provide shopping for 1 community member in partnership with HSFA.  We have had volunteers delivering LJWB newsletters and activity timetables to all LJHA tenants. There has been an increase in demand for volunteer appointment assistance and general support.

**Meal Support Volunteers** – There is a strong team of regular and bank volunteers supporting the community in the Vine and café at the MAZCC. The volunteers also delivered meals on behalf of LKK in the LJHA sheltered accommodation and into the community as well as meals ordered to Leeds city centre. As with the Pay As You Feel Café volunteers, online food hygiene training has been made available for all meal support volunteers.

**Befrienders** - Nearly 60 hours of befriending service are volunteered each month, and this is being delivered by phone, home visits, walks around the park and catching up at the MAZCC – we are always recruiting more befrienders as this service is the one we receive the most referrals for. We have been successful with new recruitment following extensive social media promotions and reaching out to existing registered volunteers.

**Volunteer Drivers** – There are 8 registered volunteer drivers driving the 2 MAZCC mobility vehicles every day during the week.  Monthly group outings take place and there was a funded trip to take service users to the seaside in the summer.  We continue to support LKK by delivering hot and frozen meals to LJHA tenants (Monday to Friday) and the community every Wednesday and Friday. Volunteer drivers are also delivering meals to hotels in Leeds City Centre.

**LJWB Charity Shop –** Volunteers still have a huge part to play in supporting the charity shop and there is always a need to recruit for more volunteers. Without our volunteer team and the support of our donors and customers this shop wouldn't be viable.

**New Year Appeal  2024/5785** – Around 16 volunteers supported the fundraising team by either getting nearly 2,000 New Year cards ready or by hand delivering them to the Community in September 2024.

**New Year Card Stall** – 6 volunteers sold New Year cards in the MAZCC each weekday for 3 weeks prior to Rosh Hashanah. The volunteer-led stall was a huge success this year and we raised a record breaking £990+ in card sales. We launched a new design for the cards designed by a member of the art class.

**Impact Care Awards 2025** - Between January and April 2025, we worked with Rabbi Cohen and the CTeens once more for the Impact Care Awards. The Impact Care awards are run by the Chabad Lubavitch and young volunteers (known as the CTeens) in School years 7-13, so youngsters aged from 11 years old until 18. They are given a few months (generally from January until March/April) to complete projects and put in their volunteer hours to go towards the Awards Dinner in June 2025. The CTeens undertook various activities, and the Volunteer Manager gave a presentation on Sunday, 12 January 2024 to promote LJWB and the projects that the volunteers could support us with. The CTeens have completed 2 car washes, raising a record breaking over £400 for LJWB, served meals for the Pay As You Feel Café and helped in the LJWB Charity Shop.

**Volunteer Celebration 2024** - This was a huge success on the later than usual date of 3rd July and the volunteers were entertained by the Brodetsky Choir and served afternoon tea by LJWB staff while enjoying a quiz presented by Sharon Bedford and Michael Huxley.

We were fortunate to host the Lord Mayor who gave a very appreciative and aspirational speech as well as gifting 'afternoon tea with the Lord Mayor' for our raffle which was won by volunteer Paul Jacobson. We received lovely feedback on the day.

**Community PAYF Café** – The Tuesday night café (with the purpose of providing a hot vegetarian meal to those that might not afford it as well as reduce social isolation) was reintroduced on Tuesday 12 November continuing to run on a monthly basis until the summer.

The 'Pay As You Feel' café continues to be run by volunteers with support from the CE&I team and the volunteers shop, cook and serve the meals. Clearing up is provided by volunteers from Allerton High School. The social activities were discontinued this time round due to lack of interest, but we kept the event running slightly longer so customers could sit and chat after their meal.

**Community Pantry** – There is also a community pantry available Mondays, Wednesdays and Fridays and this is run by Sharon Bedford and supported by 4 volunteers. We did trial volunteer shoppers using a re-surplus food depot, but they found the food quality quite low.

**LJWB Group Outings** – These trips continue to be successful engaging events, this year included taking group of service users to Whitby in August 2024.

**Moortown Primary School** – we hosted 30 Year 4 (aged 9-10 years old) students for a morning visit I November 2024 where they came to the MAZCC to learn about volunteering and the services and activities we run at the MAZCC.

**Young Volunteers** – We have processed a total of 10 Post 16 volunteers from Allerton High School during this period. These volunteers support LJWB in varying roles from helping at the charity shop, supporting the playroom to helping with activities, providing meal support in the café on Sundays and working in the Pay As You Feel Café.

Three young volunteers support our Activity Coordinator each week with different activities and are very popular with the older community members.

GSAL continue to come to the MAZCC on Wednesday afternoons and the students support the Sing Yourself Happy activity and help with Bingo & Quiz, both in the MAZCC, during school term time. We continue to have strong relationships with Allerton High School and the Grammar School at Leeds, which allows us access to assemblies and Post 16 activities to recruit volunteers.

In the first week of July 2024 we saw the first of our Allerton High work placement volunteers; Will and Jess help in the playroom in the morning and then helped out in the café over lunchtime. We hope to continue this scheme in July 2025.


**Brodetsky Intergenerational Week** – In July 2024, we hosted our second year of 1 week of intergenerational volunteering with the help of the Year 6 (ages 10-11 years old) class from Brodetsky Primary School. Following a presentation during assembly at Brodetsky, LJWB staff and volunteers then spoke to each group of 10 students about the activity they would be supporting. The students were then invited into the MAZCC to support an activity and help serve lunches. This was a huge success with the students enjoying themselves as much as the service users and we plan to continue with this annual volunteer project.

**MAZCC Activities** – Volunteers provide an amazing amount of support to help us run our varied activity programme. These have included the Chanukah Party, Annual Review & Purim Party – we held 2 events in December and 1 in March. The Chanukah party on 30th December was a great success and couldn't have happened without our volunteers. Over 90 partygoers came and there was entertainment as well as readings and singing from Rabbi Sufrin & Carl Evans finishing with a raffle.

We held our pre-Purim party at the MAZCC on Monday 10th March 2025. The party was a great success and couldn't have happened without our wonderful volunteers!

**October 7 Anniversary Event** – We held a wellbeing event to commemorate a year since the atrocities of October 7th where Rabbi Sufrin read prayers, and everyone came together to reflect and talk. It was a change to the usual music and dancing and was well received by everyone.

**Volunteer Admin** – We have been successful in ensuring all volunteers have DBS certification, ID lanyards and are now making sure all volunteers have completed the updated online or in person induction training.

**Volunteer Training** – We continue with in-person training sessions and training completed by volunteers include Mental Health First Aid training, Dementia Awareness training, Food Hygiene and Infection Risk Management (online), Basic First Aid, MAZCC Mobility Vehicle training, Wheelchair and Manual Handling.

We always have a really good response to training opportunities from volunteers, and we always try to get volunteers on to training that is offered to LJWB staff too. The re-introduction of the updated Volunteer Induction training was delivered by LJWB Managers and consisted of the following topics:

- Welcome to LJWB and an overview
- Key Policies, Professional Boundaries, Data Protection, Equality & Diversity, Volunteer Policy & Code of Conduct
- Health & Safety
- Moving & Handling (including wheelchair training)
- Safeguarding

**Volunteer Committee** – We continue to hold a Volunteer Committee meeting quarterly and we meet in person at the MAZCC. We have representatives from each activity where possible and discuss feedback from teams as well as plan the annual celebration for example. We now have a representative from the volunteer drivers as part of the committee.

**Volunteer Newsletter** – We continue with our quarterly volunteer newsletter, a seasonal newsletter, Winter, Spring, Summer and Autumn. New additions to the newsletters are the volunteer profiles and more coverage on fundraising activities.

**Our oldest Volunteer turned 100 years old!** Fabulous Listening Line volunteer, Betty Sacks, turned 100 in November and the Volunteer Team paid her a visit at home to give her cards and presents.


## Supporting people with the cost-of-living crisis

Our community pantry has continued to operate 3 mornings a week, ensuring that those who are struggling with ongoing rising costs continue to be able to access a range of Kosher basic goods, as well as a few treats, thanks to generous donations from Gourmet and our community.

Additional funding has allowed us to offer:

- Ongoing subsidies to our Lunch for Less, which feeds around 250 people every week
- 400 pantry packs of everyday essentials including toiletries, personal hygiene items, laundry and non-perishable food items
- 40 fuel vouchers, to support those struggling with rising utility bills
- 60 festival packs to support families in celebrating Rosh Hashanah, Chanukah and Purim
- 55 "treat packs" including activity vouchers, recipe cards and treats, allowing families to access affordable days out during school holidays, as well as fun things to do at home
- Feedback shared include "It has been a real help in the school holidays as the kids never stop eating!" and "We loved making rice crispy buns together!"

## Head Office

The Head Office has several dedicated functions including:

- CEO Office
- Governance
- Grants
- Finance
- HR
- Facilities Management
- Registered Care and Quality Assurance
- Telephony and IT (Since April 2024)
- Procurement

Led by the CEO, day-to-day operational delivery is overseen by the Senior Leadership Team, each having reporting responsibilities to either the Board or a committee of the Board.

As of April 2025, the Senior Leadership Team (SLT) comprised of:

| Name | Role | Committee reporting line |
|---|---|---|
| Elizabeth Bradbury | **Chief Executive Officer;** Company Secretary (LJWB & LKK); CQC Nominated Individual for Registered Care services.<br>Line management of SLT, Quality Assurance Lead, Charity Shop manager, and all Registered Care services, GDPR lead. | Board of Trustees, Care and Wellbeing Committee, plus attendance at all other committees |
| Rebecca Teiger | **Deputy CEO**<br>Line management of Community Engagement and Inclusion team, fundraising and Community Support Services and Leeds Kosher Kitchen CiC. | Fundraising<br>Leeds Kosher Kitchen CiC |

| | | |
|---|---|---|
| Karen Crowther | **Director of Finance**<br>Line management of Finance team | Finance and Corporate Services Committee, Investment Committee |
| Szczepan Swiatkowski | **Head of HR and Facilities**<br>Line management of HR and Facilities teams | Finance and Corporate Services Committee |
| Maggie Wardle | **Head of Business Services**<br>Administration, insurance, IT, data security, reception services and visitor ready audit. | Board of trustees and various committees as applicable. |

Remuneration for the Senior Leadership Team is determined by the Board of Trustees. Levels of remuneration are set by the Finance and Corporate Services Committee to ensure LJWB attracts high calibre people into these critical roles with reference to market conditions and the specific skills required to undertake these roles and responsibilities.

## Fundraising

As a charity, LJWB could not survive without donations from generous individuals, organisations, and supporter groups. Fundraised income allows LJWB to provide a wide range of activities for all ages and abilities; as well as specialist support for those who need it in line with our charitable objectives.

During the period April 2024 – March 2025 we decided that following on from the success of our previous years 'Match 4 Mental Health' Campaign we would do the same again, however this time we would add an intimate evening event to the campaign. This event was held on site at our community centre and nearly 100 people came to hear a speaker called Richard McCann talk. Richard was the son of Wilma McCann who lost her life as a young mum to the Yorkshire Ripper, Peter Sutcliffe. Those who attended the event became our ambassadors and helped share our campaign which went on to raise £113,168, without gift aid. The campaign was restricted to raising money for Mental Health, and all money was doubled by our generous matchers. Whilst this amount wasn't as successful as our previous first online campaign, we were really pleased how the community pulled together to help us over the £100,000 mark.




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Other yearly events that were held throughout the year included our London Marathon which took place in mid-April, with 6 LJWB runners, 5 of them from the places we had to offer and 1 who won a ballot place and chose to run for us, bringing in over £27,000. Our AM–AM Golf Day in June which raised over £23,000 for our Children and Family Support Services, was its 33rd year and was a fantastic sunny day with 23 teams taking part.

One of our ongoing fundraising initiatives throughout the year is our simchas (joyous occasions). This is an area which has seen growth during the year, and keeps growing, where people celebrating (e.g. birthdays or anniversaries) have asked their friends and family to kindly donate to us in lieu of a gift.

Our largest and significant fundraiser in the year was our New Year Appeal, which began at the end of September on Yom Kippur and runs until 31st March. The donations received contribute to our general costs and services which wouldn't happen without our main appeal.

Throughout the year we relied on valuable supporter groups to raise funds for LJWB through their own organised events. Additional money came in from the 'Pride Awards' run by the Pride Awards committee.  The community also enjoyed attending the Masked Singer show, with the proceeds split being spilt between 4 Leeds charities.

In November 2024 we collaborated with The Zone and the Guides and Scouts to put on a communal Fire and Lego Walk, which was planned for 2023, however due to the tragic events on the 7th October, we had to cut back on the fundraising side of the event. The event didn't bring in more than about £1500 for each charity although it was lovely community event.

Fundraising will always be challenging as we rely heavily on our regular donors and we are trying to bring on board new and younger donors from our community by looking at modern initiatives to engage with a broader mix of people and attract people who have never thought about making a donation to LJWB before but whose family, friends and community have received support from us. We are constantly updating our records, especially our Gift Aid and GDPR. This helps us to improve our communication, whether it is via email or phone so we can target more of our donors.

LJWB's Charity Shop continued to work hard to bring in much needed funds. The closure of many neighbouring shops on the parade negatively impacted our shop sales as footfall reduced and we continued to feel the impact of the cost of living with reduced sales and lower quality donations as many people chose to sell online rather than donate. However, our shop team worked hard to maximise all income through sales and online selling of specific items, and we remain grateful for all donations to help us raise much as we can.

In 2024/25 we received £814,449 in fundraised and grant income, representing a 9.6% reduction against fundraised income received in 2023/24 (not including legacy income).

## Legacies and Trust Donations

We were remembered in the Wills of 15 generous individuals, receiving £141,584 in legacies (2023/24 £96,498).

Trusts and foundations continue to be a key source of income, and we give thanks for the grants received from:

- Leeds City Council grant which helps support the cost of running our charitable services
- CST Security Grant (provided by central Government) for contribution to security guard costs.
- Leeds Community Foundation
- The Goodwin Trust
- The Guttentag Trust
- The West Riding Masonic Community Fund
- Leeds Older Peoples Forum
- West Yorkshire Business Boost (WYBB)

### Fundraising Reporting Regulations

LJWB are mindful of how we build relationships with existing and new donors. Donors can be assured we comply with the regulatory standards for fundraising. We are registered with the Fundraising Regulator and are committed to following the Code of Fundraising Practice whose standards are shared and discussed with the Fundraising Committee. Over the past year we have been particularly focused on reviewing our data protection and gift aid policies and procedures, and all fundraising staff have received GDPR training.

We have in-house fundraising expertise directly employed by LJWB and an active volunteer Fundraising Committee and Task and Finish groups. We run all our major appeals and events internally and limit the use of external third parties for fundraising. We approach people on our major appeals who have supported us in the past and we adhere to their contact preferences as stated. We have supporter groups who participate in challenges for us, such as the London Marathon. They approach their own supporters for sponsorship, and we support them with social media activities.

Our fundraising team understand that some of our supporters are likely to be vulnerable adults. Whilst we welcome all financial gifts, our fundraising team is mindful that our supporters must not be placed under undue pressure to donate and that vulnerable adults may be particularly susceptible to requests for support. We are alert to any unusual giving patterns amongst supporters, and we limit the number of approaches to individuals during major campaigns.

During the year we received no complaints regarding our fundraising practice or via the Fundraising Preference Service.

## Partnerships

This year has seen ongoing working relationships with community and statutory organisations across the city. Significant partnership working was undertaken to support the community. We continued with our many years of partnership with the Holocaust Survivors' Friendship Association funding, supporting and hosting a part-time employee. Additional work on partnerships included Leeds Jewish Housing Association, Leeds Jewish Representative Council, Jewish Leadership Council, Brodetsky Primary School, and Gourmet Foods.

We supported children with special educational needs to access activities at The Zone and participated in community meetings to support the integration of children into all communal settings.

Our volunteer team have worked hard to maintain relationship with local schools including GSAL and Allerton High.

Our partners have included:

- Allerton High School
- Brodetsky Primary School
- Chabad/CTeens
- Forum Central
- Gourmet Foods
- Grammar School At Leeds
- Holocaust Survivors' Friendship Association

- Jewish Leadership Council
- Leeds City Council
- Leeds Community Foundation
- Leeds Jewish Housing Association
- Leeds Jewish Representative Council
- Leeds Older People's Forum
- Street Lane Bakery
- The Jewish Leadership Council
- The Zone
- Voluntary Action Leeds
- West Yorkshire Children with Additional Needs Network
- Young Lives Leeds

We also continued our relationships with the Care Quality Commission (CQC), Community Security Trust (CST), Leeds Kashrut Authority, Leeds Kosher Kitchen and providers of social care charities across Leeds. We continue to host the Leeds Registered Manager's network.

## PR and Marketing

LJWB has had an extremely busy and successful year marketing wise. A new website along with new branding, including establishing and beginning to roll out a new logo, font and colourway. This has been well-received and gives a fresher, more modern and dynamic look to our brand. We recognise that there is still a way to go with this ensuring everything in-house and externally follows branding guidelines.

We are extremely active on Facebook and Instagram, as the primary social mediums used to reach a wide audience. Reels are proving extremely popular and are generating greater engagement levels. Face-to face events continue to be powerful as well as inter-generational events with local schools.

Thanks to generous funding from SKOPES, we continue to engage with the community via newsletters inserted 3 times a year into JLife lifestyle magazine – giving us access to their circulation of 13,600. We also place ½ page ads in JLife which is printed bi-monthly and fortnightly ½ page adverts in the Jewish Telegraph newspaper.

We are consistently reviewing how we communicate with our various stakeholders, whether it be via our website, other social media platforms or in the press. We are sending more information out into the community via Shuls and the Rep Council to try and improve our reach. Flyers and posters at the MAZCC, in Gourmet, The LJWB Charity Shop, LJHA and Street Lane Bakery help to ensure as many in our community are targeted as possible.

We have had a further year of review and reflection along with some challenges but hope that this next year will allow us to consolidate the brand further, improving messaging to all stakeholders.




## Compliments and Complaints

Leeds Jewish Welfare Board believes that if anyone involved with the organisation, or anyone who acts in a person's best interest wishes to make a complaint, register a concern or give a compliment, they should find it easy to do so. It is LJWB's policy to welcome complaints and compliments and look upon them as an opportunity to learn, adapt, improve, and provide better services.

The Senior Leadership Team and Registered Care teams regularly review data, outcomes and learning from customer feedback. This is shared with the Board of Trustees, relevant LJWB Committees, and communicated as appropriate to Leeds City Council, CQC, staff and volunteers.

The recording of complaints and compliments illustrates feedback for each division of the organisation i.e. Registered Care, Volunteering, Community Engagement & Support, allowing greater transparency and focus.

From 1st April 2024 to 31st March 2025 LJWB received 24 complaints which is a reduction from the previous year.

There is one on-going complaint relating to access doors to a third-party property; a solution has been sought with remedial works scheduled and due for completion late Spring.

Over the period we received 93 formal compliments, but this figure does not include all the heartfelt and encouraging messages received on LJWB's social media posts. Compliments were received directly from people using LJWB services, relatives, carers, and professionals from other organisations.

# Safeguarding

## Children

Between 1st April 2024 and 31st March 2025, Leeds Jewish Welfare Board (LJWB) submitted zero safeguarding reports regarding children to Leeds Children's Social Work Service (CSWS).

During this period, 4 concerns relating to children were received. All concerns involved children who were already known to the LJWB Children and Families Support Service.

#### Staff Training and Development

During this reporting period, the Children's Safeguarding Lead maintained up-to-date safeguarding training and participated in several additional webinars during Safeguarding Week. Training specifically related to supporting children who have witnessed domestic abuse was also completed, enhancing LJWB's capacity to respond to complex safeguarding needs.

## Adults

in 2024-5 LJWB made 6 referrals relating to Adult Safeguarding about people who we provide services to and are concerned about their wellbeing. Reasons for referrals included:-

- Self-Neglect
- Physical health
- Financial abuse
- Care received from other providers
- Safety
- Unsanitary living conditions
- Mental health concerns

In the reporting period 6 adult safeguarding cases have been raised; 1 of which has been reported to the CQC. No further action was required, other than lessons learned and staff disciplinaries.

LJWB has 2 specialist safeguarding team members who receive regular training to ensure that have the appropriate knowledge to be our safeguarding leads.

Every organisation that works with children needs to have someone that takes the lead on safeguarding and child protection. This year as part of their responsibilities they have undertaken additional courses including Preventing Radicalisation training, Trauma

Informed Practice, Prevent training and SENDIASS, (Special Educational Needs and Disability Information, Advice and Support Service).

## Governance

Leeds Jewish Welfare Board is a company limited by guarantee (number 02923217), governed by its Articles of Association adopted on the 12th October 2015 and revised on 5th December 2022. It is a registered charity with the Charity Commission (number 1041257).

LJWB does not have a share capital, and the guaranteed liability of each member (trustee) is limited to £1. No member of the Board has an interest in shares required to be registered and reported under the Companies Act 2006.

Two members of the Board also serve as Directors for Leeds Kosher Kitchen CiC and this company is asset locked for the purposes of LJWB. LJWB also supports LKK financially and with back-office support to ensure the longevity of supervised kosher food to the community.

LJWB is overseen by a Board of Trustees, which consists of between 6 and 9 trustees led by the Chair, who all provide governance to the organisation. The trustees formally meet as a Board at least 6 times a year to discuss, challenge and review the activities of LJWB in line with the roles and responsibilities as defined by the Charity Commission. During 2024-25, there were 6 planned Board of Trustees meetings and additional strategy, and value development days were held in the Winter of 2024-25. The AGM was held on 18th November 2024 during which the 2023/4 accounts were adopted.

The Board delegates responsibility to sub-committees each led by a LJWB Trustee. The sub-committees include members of the community, and the CEO, and Senior Leadership Team members responsible for service delivery are in attendance.

These sub-committees are:

- Registered Care (previously called Care and Wellbeing)
- Finance and Corporate Services
- Fundraising
- Investments

Some of the sub-committees also have sub-groups or 'task and finish' groups which look at specific projects or services. During the year additional task and finish fundraising groups were set up. A new committee has been established to oversee the work of Leeds Kosher Kitchen CiC and this is supported by a user reference group.

The trustees act on a voluntary basis and receive no remuneration for the performance of their duties.

The Chief Executive Officer (CEO) is employed by the Board and reports directly to the Chair of the Board of Trustees. The CEO is responsible for the day-to-day operations of the organisation and is supported by a Senior Leadership Team who report directly to this position. To facilitate effective operations, the Chief Executive has delegated authority, within terms of delegation approved by the Board, for all operational matters including finance and fundraising, employment, social and registered care services.

During the year, the Board reported no Serious Incidents to the Charity Commission.

## Trustee appointment, induction, and training

Additional documentation has been developed this year to support trustees in their role including a new handbook, induction materials and code of conduct. Where required additional training is offered in areas such as our Articles of Association and Charity Commission guidance to allow them to understand the role and responsibilities of the Board.

An induction process is in place and additional relevant training is available for all trustees, including spending time with the professional staff to provide a comprehensive overview of LJWB's work and support from the SLT and experienced Trustees. Ongoing training and development opportunities are available for all our Trustees including external training. Trustees are expected to visit our services and take part in communal activities and events. Trustees must also agree to adhere to our Code of Conduct, Declaration of Interests requirements, confidentiality requirements, and undertake DBS checks, as well as be familiar with key policies and procedures such as safeguarding and data protection.

According to our Articles of Association, LJWB Trustees hold office for 3 years from the date of their appointment at the end of which they shall be eligible for re-appointment for 1 or more further terms of 3 years each but having served their maximum term of office of 9 consecutive years shall not be eligible for re-appointment until 1 year after their retirement as a LJWB Trustee. During the period of reporting no trustees stepped down from their role.

## Insurance for trustees and officers

Insurance for Trustees and Officers against liabilities in relation to the company, as permitted by the Companies Act 2006, is maintained under a policy held by Leeds Jewish Welfare Board.

## Risk management

LJWB has developed an approach to good governance that includes the development of a strategic risk register and a risk management strategy which reviews the risk that the charity faces and has established a system and procedures to mitigate those risks. An overall organisational risk management plan is presented to and reviewed regularly by the Board of Trustees and sub-committees. Operational risk assessments are carried out regularly by members of SLT. Additional risk assessments are undertaken and recorded in relation to individual service users and clients, events and activities, staff, visitors, and commercial activities.

Registered Care services have their own risk register and, where appropriate, risk logs for service users / clients. These services have their own separate Business Continuity Plans, with the remaining services under the LJWB Business Continuity Plan.

The Board reviews the risk log and mitigating actions regularly. Financial risks highlighted in last year's report remain and have increased in risk owing to additional taxation and a reduction in donations. Emerging risks are now noted, with a focus on mitigating actions to address the increasing cyber security risks.

At the end of the 2024-25 reporting period, the Trustees believe the following to be the key financial, operational, governance, legal, and external risks facing the organisation.

| Risk | Brief overview of mitigating action |
|---|---|
| Financial risks: economic pressures affecting finances; not meeting forecasted income impacting on services. | Review of all services, costs and plan for financial recovery over next 1-3 years. |
| Operational risks: economic pressures affecting services and leading to increasing demand for services; training, recruiting, retaining suitable pool of people to deliver services. | Inhouse restructure of CE&I to meet future service constraints and available finance.<br><br>Clear assessment and review process with referrals and signposting to other internal and external services.<br><br>In-house dedicated staff recruitment and training function, and volunteer management. |

| | |
|---|---|
| | Dedicated recruitment and HR team to support recruitment.<br><br>Introduction of additional assessments when recruiting members of staff.<br><br>Revision of organisational values. |
| Governance risks: loss of key personnel; lack of relevant skills or understanding of the Board responsibilities; lack of strategic vision. | Recruitment of new Trustees and committee members.<br><br>New welcome pack for Trustees.<br><br>Board strategy sessions including values, communication styles and strategic direction, funded by West Yorkshire Business Boost (WYBB). |
| Legal risks: compliance with legislation, regulation, and best practice in all service areas. | HR and Facilities departments oversee employment law and H&S legislation.<br><br>Registered Care Quality Assurance Lead, Safeguarding Leads in post and regular and up-to-date training provided.<br><br>Nominated GDPR lead.<br><br>Nominated Digital Protection and Security Toolkit lead. Passed DPST checks.<br><br>Nominated DBS lead – passed annual compliance review by DBS.<br><br>Clear organisational policies and procedures in place with document controls for regular reviews and sharing. |
| External risks: security risk including physical risk to our Community Centre and cyber security; reputational risk and public perception; changing demographics in Leeds and Yorkshire. | Partnership working with Community Security Trust (CST) and other external security advisors.<br>Business continuity plans in place – updated at least annually.<br>Complaints procedure in place.<br>Staff training and briefings.<br>Multi Factor Authentication for online transactions and access to LJWB systems.<br>Upgrade of IT and telephony systems ensuring fit for future technology. |

## Public Benefit

In shaping our objectives for the year and planning our activities, the Board has considered the Charity Commission's guidance on public benefit, including the guidance "*Public benefit: running a charity (PB2)*". The charity relies on grants, donations and operating surpluses, the income from fees and charges to cover its costs. Affordability and access to our services is important to us and one which we constantly review, as are the costs associated with delivering our services.

Strategies employed to achieve the Charity's objectives include:-

- Establishing Leeds Kosher Kitchen CiC as the provider of kosher food at the MAZCC following an unsuccessful tender exercise to find a suitable provider.
- Revised opening times of the community centre to help ease the financial burden of providing paid security at all times.
- Commissioned in depth service reviews – due to report Autumn 2025.
- Invested in our registered care homes to ensure that residents have modern, fit for purpose and legally complaint accommodation.
  Expanded our service offering to include more activities and volunteer led programmes.
- Provided flexible levels of support and assistance to help people to remain as independent as possible recognising the additional needs of some members of our community including those with a mental health problem, learning disability or difficulty, physical disability, and sensory loss.

Developing and delivering an enhanced model of employment, training, and volunteer options to ensure that we have the right people to deliver our services in a cost-effective and sustainable way.

# Financial Summary

## Overview

Incoming resources were £3,679,201 which was c £8,000 below 2023-2024. Expenditure increased by c £289,000 over the same period to £4,338,092. A small loss on investments of £12,785 resulted in a net reduction of funds of £671,676.

## Investment Policy and performance

It was another volatile year for the markets, and the recovery in markets seen in 2023-2024 has eroded slightly during 2024-2025.

LJWB routinely invests surplus funds and legacies via our investment advisor (Rathbones). We are reliant on a good dividend yield to finance our charitable work. We have instructed Rathbones to operate in line with our investment policy and to achieve a return in reasonable excess of inflation over the long term, although this will not be possible every year due to market fluctuations. Investments have been selected prudently within the constraints of a medium risk portfolio. This portfolio is appropriately diversified across different asset classes.

## ESG (Environmental, Social, and Governance)

LJWB have broadly defined its investment brief to Rathbones with respect to ESG. In accordance with Charity Commission guidelines and with the aim to be a socially responsible investor, LJWB continues to strive to invest in companies where the activities of the company are consistent with the values and objectives of LJWB.

An MSCI ESG rating is designed to measure a company's resilience to financially material environmental, societal and governance risks. During 2023, the LJWB investment portfolio obtained an MSCI ESG rating of AAA and this has been maintained.

## Reserves and Designated Funds

### Reserves

In line with Charity Commission guidance, the Trustees consider readily realisable (free) reserves to be the amount of reserves that are easily converted into cash should the need arise. This therefore excludes restricted funds, designated funds, and any part of unrestricted funds not readily available for spending.

Trustees are responsible for determining the correct level of free reserves required by LJWB based on a consideration of the needs of the business, the risk of potentially volatile donation and legacy income, and declines in contractual or grant income from statutory bodies.

## Reserves Policy and Position

The reserves policy was reviewed in 2024/5 using a risk-based approach to the resilience of key income streams and the commitment levels of charitable activity expenditure. The reserves policy of LJWB states that we should aim to hold 12 months of reserves which historically has been based on charitable activities expenditure. As of 31st March 2025, this is approximately £3.9 million which is based on an average of the previous 2 years' charitable activity expenditure.

The total reserves of LJWB as at 31st March 2025 were £7.09 million (2024: £7.76 million) comprising of unrestricted reserves of £3.8 million (2024: £4.4 million) and restricted reserves of £3.3 million (2023: £3.3 million). Of the unrestricted reserves, £655k relates to fixed assets and £100k relates to a designated fund to support the continuing investment programme in our learning disability. Therefore free reserves as at 31 March 2025 stood at £2.97m, which is below the reserves target.

The Trustees continue to monitor the level of free reserves at regular intervals via the Finance & Corporate Services Committee. The current uncertain economic climate and inflationary challenges have been reviewed, and Trustees deem it prudent to ensure sufficient funds are available to support service delivery.

## Subsidiaries

LJWB has no subsidiaries but does have an interest in Leeds Kosher Kitchen CiC.

## Trustees' Responsibilities Statement

The Trustees (who are also the directors of the charity for the purposes of company law) are responsible for preparing the Trustees' report including the Strategic 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. Under company law, the Trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charity and of its incoming resources and application of resources, including its income and expenditure, 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 of the Charities SORP (FRS 102);
- make judgements and accounting estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards (FRS 102) 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 charity will continue in business.

The Trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charity's transactions and 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. 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.

## Disclosure of information to auditor

Each of the Trustees at the time when this trustees' report is approved has confirmed that:

- so far as that Trustee is aware, there is no relevant audit information of which the charitable group's auditor is unaware, and
- that Trustees have taken all the steps that ought to have been taken as a Trustee in order to be aware of any relevant audit information and to establish that the charitable group's auditor is aware of that information. Approved by order of the members of the Board of Trustees and signed on its behalf by:

Helen Lewis

Signer ID: MWQCFECOFH...

**Helen Lewis, Chair of the Board**

**Date:** 17 November 2025

# INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF LEEDS JEWISH WELFARE BOARD

## Opinion

We have audited the financial statements of Leeds Jewish Welfare Board (the 'charitable company') for the year ended 31 March 2025, 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 March 2025, 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 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' report, other than the financial statements and our auditor's report thereon. The trustees are responsible for the other information. 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, which includes the strategic report and the directors' report prepared for the purposes of company law, for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- the strategic report and the directors' report included within the trustees' report have 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 strategic report and the directors' report included within the trustees' 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 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 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:

- the engagement partner ensured that the engagement team collectively had the appropriate competence, capabilities and skills to identify or recognise non-compliance with applicable laws and regulations;
- we identified the laws and regulations applicable to the charitable company through discussions with trustees and other management, and from our commercial knowledge and experiences of the charity's sector;
- we focussed on specific laws and regulations which we considered may have a direct material effect on the financial statements or the operations of the charitable company, including the Charities Act 2011, Companies Act 2006, taxation legislation and data protection, employment and health and safety legislation;
- we assessed the extent of compliance with the laws and regulations identified above through making enquiries of management and inspecting legal correspondence throughout;
- identified laws and regulations were communicated within the audit team regularly and the team remained alert to instances of non-compliance throughout the audit.

We assessed the susceptibility of the charitable company's financial statements to material misstatement, including obtaining an understanding of how fraud might occur, by;

- making enquiries of management as to where they considered there was susceptibility to fraud, their knowledge of actual, suspected and alleged fraud; and
- considering the internal controls in place to mitigate risks of fraud and non-compliance with laws and regulations.

To address the risks of fraud through management bias and override controls, we:

- performed analytical procedures to identify any unusual or unexpected relationships;
- tested journal entries to identify unusual transactions;
- assessed whether judgements and assumptions made in determining the accounting estimates set out in note 2 were indicative of potential bias; and
- investigated the rationale behind significant or unusual transactions.

In response to the risk of irregularities and non-compliance with laws and regulations, we designed procedures which included, but were not limited to:

- agreeing financial statement disclosures to underlying supporting documentation;
- reading the minutes of meetings of those charged with governance; and
- enquiring of management as to actual and potential litigation and claims.

Because of the inherent limitations of an audit, there is a risk that we will not detect all irregularities, including those leading to a material misstatement in the financial statements or non-compliance with regulation. This risk increases the more that compliance with a law or regulation is removed from the events and transactions reflected in the financial statements, as we will be less likely to become aware of instances of non-compliance. The risk is also greater regarding irregularities occurring due to fraud rather than error, as fraud involves intentional concealment, forgery, collusion, omission or misrepresentation.

A further description of our responsibilities is available on the FRC's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor’s report.

**Use of our report**

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the 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.

Laura Masheder
Signer ID: IPFNE7JEI6...
Laura Masheder (Senior statutory auditor)

for and on behalf of

**BHP LLP**
Chartered Accountants
Statutory Auditor
1st Floor
Mayesbrook House
Leeds
LS16 6QY

Date: 02/12/2025 GMT

## STATEMENT OF FINANCIAL ACTIVITIES (INCORPORATING INCOME AND EXPENDITURE ACCOUNT)

*FOR THE YEAR ENDED 31 MARCH 2025*

| | Note | Unrestricted funds 2025 £ | Restricted funds 2025 £ | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|---|---|---|
| **Income from:** | | | | | |
| Grants, donations and legacies | 4 | **839,489** | **116,544** | **956,033** | 997,366 |
| Charitable activities | 5 | **2,572,826** | **8,486** | **2,581,312** | 2,541,996 |
| Investments | 6 | **116,971** | **-** | **116,971** | 103,103 |
| Other income | 7 | **24,885** | **-** | **24,885** | 45,378 |
| **Total income** | | **3,554,171** | **125,030** | **3,679,201** | 3,687,843 |
| **Expenditure on:** | | | | | |
| Raising funds | 8 | **157,246** | **57** | **157,303** | 145,309 |
| Charitable activities | 10,11 | **4,023,449** | **157,340** | **4,180,789** | 3,769,111 |
| **Total expenditure** | | **4,180,695** | **157,397** | **4,338,092** | 3,914,420 |
| **Net expenditure before net (losses)/gains on investments** | | **(626,524)** | **(32,367)** | **(658,891)** | (226,577) |
| Net (loss)/gain on investments | 18 | **(14,331)** | **1,546** | **(12,785)** | 314,831 |
| **Net (expenditure)/income** | | **(640,855)** | **(30,821)** | **(671,676)** | 88,254 |
| Transfers between funds | 21 | **(50,035)** | **50,035** | **-** | - |
| **Net movement in funds** | | **(690,890)** | **19,214** | **(671,676)** | 88,254 |
| **Reconciliation of funds:** | | | | | |
| Total funds brought forward | 21 | **4,432,805** | **3,325,491** | **7,758,296** | 7,670,042 |
| Net movement in funds | | **(690,890)** | **19,214** | **(671,676)** | 88,254 |
| **Total funds carried forward** | 21 | **3,741,915** | **3,344,705** | **7,086,620** | 7,758,296 |

The Statement of Financial Activities complies with the requirements for an income and expenditure account under the Companies Act 2006 and includes all gains and losses recognised in the year.

All income and expenditure has arisen from continuing activities.

# BALANCE SHEET
*AS AT 31 MARCH 2025*

| | Note | | 2025 £ | | 2024 £ |
|---|---|---|---|---|---|
| **Fixed assets** | | | | | |
| Intangible assets | 16 | | **19,753** | | 14,377 |
| Tangible assets | 17 | | **655,205** | | 639,407 |
| Investments | 18 | | **6,232,474** | | 6,851,957 |
| | | | **6,907,432** | | 7,505,741 |
| **Current assets** | | | | | |
| Debtors | 19 | **294,225** | | 255,238 | |
| Cash at bank and in hand | | **266,699** | | 406,132 | |
| | | **560,924** | | 661,370 | |
| **Current liabilities** | | | | | |
| Creditors: amounts falling due within one year | 20 | **(381,736)** | | (408,815) | |
| **Net current assets** | | | **179,188** | | 252,555 |
| **Total assets less current liabilities** | | | **7,086,620** | | 7,758,296 |
| **Total net assets** | | | **7,086,620** | | 7,758,296 |
| **Charity funds** | | | | | |
| Restricted funds | 21 | | **3,344,705** | | 3,325,491 |
| Unrestricted funds | | | | | |
| Designated funds | 21 | **185,039** | | 251,611 | |
| General funds | 21 | **3,197,196** | | 3,675,405 | |
| Revaluation reserve | | **359,680** | | 505,789 | |
| Total unrestricted funds | 21 | | **3,741,915** | | 4,432,805 |
| **Total funds** | | | **7,086,620** | | 7,758,296 |

BALANCE SHEET (CONTINUED)

*AS AT 31 MARCH 2025*

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

The financial statements were approved and authorised for issue by the Trustees and signed on their behalf by:

Helen Lewis

................................................

Signer ID: MWQCFECOFH...

**H R A Lewis**

Chair

Date: 17 November 2025

The notes on pages 56 to 83 form part of these financial statements.

## STATEMENT OF CASH FLOWS
*FOR THE YEAR ENDED 31 MARCH 2025*

| | Note | 2025 £ | 2024 £ |
|---|---|---|---|
| **Cash flows from operating activities** | | | |
| Net cash provided by operating activities | 24 | **(718,188)** | 14,946 |
| **Cash flows from investing activities** | | | |
| Dividends, interests and rents from investments | | **116,971** | 103,103 |
| Purchase of intangible assets | | **(15,672)** | - |
| Proceeds from the sale of tangible fixed assets | | **1,729** | - |
| Purchase of tangible fixed assets | | **(130,971)** | (170,208) |
| Proceeds from sale of investments | | **1,453,490** | 1,366,373 |
| Purchase of investments | | **(1,064,765)** | (1,375,665) |
| **Net cash provided by/(used in) investing activities** | | **360,782** | **(76,397)** |
| **Cash flows from financing activities** | | | |
| Repayment of loans | | **-** | (350,238) |
| Loan interest paid | | **-** | (14,008) |
| **Net cash provided by/(used in) financing activities** | | **-** | **(364,246)** |
| **Change in cash and cash equivalents in the year** | | **(357,406)** | **(425,697)** |
| Cash and cash equivalents at the beginning of the year | | **1,098,725** | 1,524,422 |
| **Cash and cash equivalents at the end of the year** | 25 | **741,319** | 1,098,725 |

The notes on pages 56 to 83 form part of these financial statements

## 1. General information

The principal activity of the charity during the year was that of the provision of a range of social care services and activities. More information is included in the Trustees' report.

The charity is a company limited by guarantee which is incorporated and registered in England (no. 02923217) and a registered charity (no.1041257). The address of the registered office is:

Marjorie and Arnold Ziff Community Centre
311 Stonegate Road
Leeds
LS17 GAZ

The company is limited by subscriber's guarantee and does not have a share capital. In the event of a winding up the liability of each of the subscribers is limited to £1.

## 2. Accounting policies

### *2.1 Basis of preparation of financial statements*

The financial statements have been prepared in accordance with the Charities SORP (FRS 102) - 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 October 2019), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) and the Companies Act 2006.

Leeds Jewish Welfare Board meets the definition of a public benefit entity under FRS 102. Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy.

The financial statements are presented in pound Sterling, which is the functional currency of the charity, and are rounded to the nearest £.

### *2.2 Going concern*

The financial statements have been prepared on the basis that the charity can continue to operate as a going concern. The Trustees have approved the 2025-26 financial budget and reviewed forecasts up until December 2026 incorporating known challenges, including social and registered care reducing income from Local Authority funding, the pressures of inflation on expenditure budgets for LJWB and the impact this will have on our generous donors within the community. After making enquiries the Trustees have a confident expectation that the Charity has adequate resources to continue in operational existence for the foreseeable future. The Charity therefore continues to adopt the going concern basis of preparation for the financial statements.

**2. Accounting policies (continued)**

***2.3 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 income receivable can be measured reliably.

The recognition of income from legacies is dependent on establishing entitlement, the probability of receipt and the ability to estimate with sufficient accuracy the amount receivable. Evidence of entitlement to a legacy exists when the charity has sufficient evidence that a gift has been left to them (through knowledge of the existence of a valid will and the death of the benefactor) and the executor is satisfied that the property in question will not be required to satisfy claims in the estate. Receipt of a legacy must be recognised when it is probable that it will be received and the fair value of the amount receivable, which will generally be the expected cash amount to be distributed to the charity, can be reliably measured.

Grants are included in the Statement of financial activities on a receivable basis. The balance of income received for specific purposes but not expended during the period is shown in the relevant funds on the Balance sheet. Where income is received in advance of entitlement of receipt, its recognition is deferred and included in creditors as deferred income. Where entitlement occurs before income is received, the income is accrued.

Other income is recognised in the period in which it is receivable and to the extent the goods have been provided or on completion of the service.

***2.4 Expenditure***

Expenditure is recognised once there is a legal or constructive obligation to transfer economic benefit to a third party, it is probable that a transfer of economic benefits will be required in settlement and the amount of the obligation can be measured reliably. Expenditure is classified by activity. The costs of each activity are made up of the total of direct costs and shared costs, including support costs involved in undertaking each activity. Direct costs attributable to a single activity are allocated directly to that activity. Shared costs which contribute to more than one activity and support costs which are not attributable to a single activity are apportioned between those activities on a basis consistent with the use of resources. Central staff costs are allocated on the basis of time spent, and depreciation charges allocated on the portion of the asset's use.

Expenditure on raising funds includes all expenditure incurred by the charity to raise funds for its charitable purposes and includes costs of all fundraising activities events and non-charitable trading.

Expenditure on charitable activities is incurred on directly undertaking the activities which further the charity's objectives, as well as any associated support costs.

Grants payable are charged in the year when the offer is made except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled. Grants offered subject to conditions which have not been met at the year end are noted as a commitment, but not accrued as expenditure.

All expenditure is inclusive of irrecoverable VAT.

**2. Accounting policies (continued)**

***2.5 Interest receivable***

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

***2.6 Intangible assets and amortisation***

Intangible assets costing £600 or more are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably.

Intangible assets are initially recognised at cost. After recognition, under the cost model, intangible assets are measured at cost less any accumulated amortisation and any accumulated impairment losses.

Amortisation is provided on intangible assets at rates calculated to write off the cost of each asset on a straight-line basis over its expected useful life.

Amortisation is provided on the following basis:

| | |
|---|---|
| Computer software | - 10 % - 50% straight line |

***2.7 Tangible fixed assets and depreciation***

Tangible fixed assets costing £600 or more are capitalised and recognised when future economic benefits are probable and the cost or value of the asset can be measured reliably.

Tangible fixed assets are initially recognised at cost. After recognition, under the cost model, tangible fixed assets are measured at cost less accumulated depreciation and any accumulated impairment losses. All costs incurred to bring a tangible fixed asset into its intended working condition should be included in the measurement of cost.

Depreciation is charged so as to allocate the cost of tangible fixed assets less their residual value over their estimated useful lives, using the straight-line method.

Depreciation is provided on the following bases:

| | |
|---|---|
| Leasehold property improvements | - 5% - 25% straight line |
| Motor vehicles | - 20% straight line |
| Fixtures and fittings | - 10% - 33% straight line |
| Office equipment | - 10% - 33% straight line |
| Computer equipment | - 10% - 50% straight line |

**2. Accounting policies (continued)**

***2.8 Investments***

Fixed asset investments are a form of financial instrument and are initially recognised at their transaction cost and subsequently measured at fair value at the Balance sheet date, unless the value cannot be measured reliably in which case it is measured at cost less impairment. Investment gains and losses, whether realised or unrealised, are combined and presented as 'Gains/(Losses) on investments' in the Statement of financial activities.

Investments held as fixed assets are shown at cost less provision for impairment.

Concessionary loans are those made or received by a charity to further its purposes and any interest charged is below the prevailing market rates. The loans are initially recognised and measured at the amount received or paid, with the carrying amount adjusted in subsequent years to reflect repayments and any accrued interest and adjusted if necessary for any impairment.

***2.9 Debtors***

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

***2.10 Cash at bank and in hand***

Cash at bank and in hand includes cash and short-term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account.

***2.11 Liabilities and provisions***

Liabilities are recognised when there is an obligation at the Balance sheet date as a result of a past event, it is probable that a transfer of economic benefit will be required in settlement, and the amount of the settlement can be estimated reliably.

Liabilities are recognised at the amount that the charity anticipates it will pay to settle the debt or the amount it has received as advanced payments for the goods or services it must provide.

Provisions are measured at the best estimate of the amounts required to settle the obligation. Where the effect of the time value of money is material, the provision is based on the present value of those amounts, discounted at the pre-tax discount rate that reflects the risks specific to the liability. The unwinding of the discount is recognised in the Statement of financial activities as a finance cost.

***2.12 Financial instruments***

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

**2. Accounting policies (continued)**

***2.13 Pensions***

The charity contributes to three pension schemes, two defined contribution pension schemes and an unfunded final salary scheme.. The assets of the schemes are held separately from those of the group in independently administered funds.

The pension cost charge represents contributions payable by the group to the fund in respect of salaries earned in the accounting period.

The final salary scheme is operated by the National Health Service Superannuation Scheme, is only available to staff who have previously contributed to the scheme. As this is an unfunded government scheme the administration of the scheme is dealt with by the National Health Service Pension agencies. Contributions to this scheme are paid in respect of current service, and there is no liability to the charity in respect of past service. Consequently, the pension cost charge represents contributions payable to scheme in respect of salaries earned in the accounting period.

***2.14 Fund accounting***

General funds are unrestricted funds which 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 each designated fund is 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 costs 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.

Investment income, gains and losses are allocated to the appropriate fund.

## *3.* Critical accounting estimates and areas of judgment

Estimates and judgments 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.

Critical accounting estimates and assumptions:

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

Concessionary loans:

Concessionary loans are recognised at the amount advanced, less repayments and any impairment, as they are made to further the charity's aims rather than for financial return. Management reviews the recoverability of such loans annually, using judgement to assess repayment likelihood and to recognise provisions where balances are considered doubtful. At the reporting date, concessionary loans totalled £2,249,509 (2024: £2,249,509).

Support costs:

Support costs are those that relate to the governance and administration of the charity and are apportioned to activities on a reasonable and consistent basis. The allocation of such costs requires judgement in selecting cost drivers and management have allocated the costs of the various charitable activities using a percentage basis of full time equivalent hours worked. Total support costs allocated in the year totalled £844,116 (2024: £723,749).

## 4. Income from grants, donations and legacies

| | **Unrestricted funds 2025 £** | **Restricted funds 2025 £** | **Total funds 2025 £** | Total funds 2024 £ |
|---|---|---|---|---|
| ***Donations*** | | | | |
| Donations | 610,735 | 9,423 | **620,158** | 757,707 |
| Sale of donated goods | 71,070 | - | **71,070** | 73,832 |
| ***Total donations*** | 681,805 | 9,423 | **691,228** | 831,539 |
| Donations | - | 84,813 | **84,813** | - |
| Legacies | 141,584 | - | **141,584** | 96,498 |
| Grants | 16,100 | 22,308 | **38,408** | 69,329 |
| | 157,684 | 107,121 | **264,805** | 165,827 |
| ***Total 2025*** | 839,489 | 116,544 | **956,033** | 997,366 |
| Total 2024 | 863,583 | 133,783 | 997,366 | |

The charity benefits greatly from the involvement and enthusiastic support of its many volunteers, details of which are given in our annual report. In accordance with FRS 102 and the Charities SORP (FRS 102), the economic contribution of general volunteers is not recognised in the accounts.

## 5. Income from charitable activities

| | Unrestricted funds 2025 £ | Restricted funds 2025 £ | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|---|---|
| Community Support Services | 53,196 | 4,620 | **57,816** | 78,841 |
| Community Engagement and Inclusion | 55,323 | 1,666 | **56,989** | 63,331 |
| MAZCC | 19,067 | - | **19,067** | 68,948 |
| Moorcare | 671,594 | - | **671,594** | 573,932 |
| Learning Disabilities | 1,773,646 | 2,200 | **1,775,846** | 1,756,944 |
| ***Total 2025*** | 2,572,826 | 8,486 | **2,581,312** | 2,541,996 |
| Total 2024 | 2,463,986 | 78,010 | 2,541,996 | |

## 6. Investment income

| | Unrestricted funds 2025 £ | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|---|
| Income from UK listed investments | 105,863 | **105,863** | 94,388 |
| Bank interest receivable | 3,108 | **3,108** | 715 |
| Other interest receivable | 8,000 | **8,000** | 8,000 |
| ***Total 2025*** | 116,971 | **116,971** | 103,103 |
| Total 2024 | 103,103 | 103,103 | |

## 7. Other income

| | **Unrestricted funds 2025 £** | **Total funds 2025 £** | Total funds 2024 £ |
|---|---|---|---|
| Management fees | 24,885 | **24,885** | 45,378 |
| Total 2024 | 45,378 | 45,378 | |

## 8. Expenditure on raising funds

***Costs of raising voluntary income***

| | **Unrestricted funds 2025 £** | **Restricted funds 2025 £** | **Total funds 2025 £** | Total funds 2024 £ |
|---|---|---|---|---|
| Costs of raising voluntary income | 49,582 | 57 | **49,639** | 43,658 |
| Staff costs | 105,557 | - | **105,557** | 99,582 |
| Depreciation | 2,107 | - | **2,107** | 2,069 |
| ***Total 2025*** | 157,246 | 57 | **157,303** | 145,309 |
| Total 2024 | 145,309 | - | 145,309 | |

## 9. Analysis of grants

| | Grants to Institutions 2025 £ | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|---|
| Leeds Kosher Kitchen | 135,000 | **135,000** | - |

During the year, a grant in kind was made to Leeds Kosher Kitchen of £135,000. This value reflects the Welfare Board's commitment to providing ongoing Kosher food to the community and is inline with amounts supported in previous years when the provision was provided by an unrelated third party. This grant was paid in kind via the partial support of certain direct staff costs.

## 10. Analysis of expenditure on charitable activities

***Summary by fund type***

| | Unrestricted funds 2025 £ | Restricted funds 2025 £ | Total 2025 £ | Total 2024 £ |
|---|---|---|---|---|
| Community Support Services | 414,833 | 136,517 | **551,350** | 484,534 |
| Community Engagement and Inclusion | 318,654 | 10,542 | **329,196** | 423,977 |
| MAZCC | 412,476 | - | **412,476** | 409,937 |
| Moorcare | 808,042 | - | **808,042** | 658,748 |
| Learning Disabilities | 1,721,208 | 10,281 | **1,731,489** | 1,633,700 |
| Leeds Kosher Kitchen | 135,000 | - | **135,000** | - |
| Holocaust Survivors Group | 3,657 | - | **3,657** | 3,625 |
| Catering Costs | 88,606 | - | **88,606** | 48,410 |
| Overheads | 120,973 | - | **120,973** | 106,180 |
| | 4,023,449 | 157,340 | **4,180,789** | 3,769,111 |
| Total 2024 | 3,434,850 | 334,261 | 3,769,111 | |

## 11. Analysis of expenditure by activities

| | **Activities undertaken directly 2025 £** | **Grant funding of activities 2025 £** | **Support costs 2025 £** | **Total funds 2025 £** | Total funds 2024 £ |
|---|---|---|---|---|---|
| Community Support Services | 432,508 | - | 118,842 | **551,350** | 484,534 |
| Community Engagement and Inclusion | 260,619 | - | 68,577 | **329,196** | 423,977 |
| MAZCC | 378,524 | - | 33,952 | **412,476** | 409,937 |
| Moorcare | 644,005 | - | 164,037 | **808,042** | 658,748 |
| Learning Disabilities | 1,450,354 | - | 281,135 | **1,731,489** | 1,633,700 |
| Leeds Kosher Kitchen | - | 135,000 | - | **135,000** | - |
| Holocaust Survivors Group | 3,657 | - | - | **3,657** | 3,625 |
| Catering | 32,006 | - | 56,600 | **88,606** | 48,410 |
| Overheads | - | - | 120,973 | **120,973** | 106,180 |
| ***Total 2025*** | 3,201,673 | 135,000 | 844,116 | **4,180,789** | 3,769,111 |
| Total 2024 | 3,045,362 | - | 723,749 | 3,769,111 | |

## 11. Analysis of expenditure by activities (continued)

### Analysis of support costs

| | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|
| Staff costs | **507,500** | 455,353 |
| Depreciation | **34,471** | 31,656 |
| Telephone | **14,155** | 13,633 |
| Sundry expenses | **35,412** | 21,067 |
| IT support | **76,191** | 52,216 |
| Legal and professional | **14,996** | 33,961 |
| Investment managers costs | **26,909** | 26,722 |
| Printing, stationary and postage | **12,032** | 11,068 |
| Training and recruitment | **37,419** | 12,644 |
| Insurance | **24,814** | 23,820 |
| Bad debts | **18,788** | - |
| Bank charges and interest | **9,191** | 16,177 |
| Loss on disposal of fixed assets | **2,257** | - |
| Governance costs | **29,981** | 25,432 |
| ***Total 2025*** | **844,116** | 723,749 |

Support costs are allocated to the costs of the various charitable activities using a percentage basis of full time equivalent hours worked.

## 12. Net income/(expenditure)

| | 2025 £ | 2024 £ |
|---|---|---|
| Amortisation of intangible fixed assets | **10,296** | 6,009 |
| Depreciation of tangible fixed assets | **111,187** | 101,199 |
| Operating lease payments | **31,106** | 45,186 |

## 13. Auditor's remuneration

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Fees payable to the charity's auditor for the audit of the charity's annual accounts | **16,550** | 15,750 |
| Fees payable to the charity's auditor in respect of: | | |
| All non-audit services not included above | **2,880** | 2,750 |

## 14. Staff costs

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Wages and salaries | **2,676,571** | 2,482,312 |
| Social security costs | **252,249** | 216,429 |
| Contribution to pension schemes | **71,147** | 63,457 |
| | **2,999,967** | 2,762,198 |

During the year redundancy and termination payments totalling £5,191 (2024: £26,000) were made to employees. No payments were outstanding at the balance sheet date (2024: £NIL).

The average number of persons employed by the charity during the year was as follows:

| | **2025** | 2024 |
|---|---|---|
| | **No.** | No. |
| Total staff | **131** | 123 |

## 14. Staff costs (continued)

The average headcount expressed as full-time equivalents was: 86 (2024: 86)

| | **2025 No.** | 2024 No. |
|---|---|---|
| Community support services | **12** | 11 |
| Community engagement and inclusion | **7** | 8 |
| MAZCC | **4** | 4 |
| Moorcare | **17** | 15 |
| Learning Disabilities | **28** | 33 |
| Fundraising | **-** | 2 |
| Administrative staff | **12** | 13 |
| Catering | **6** | - |
| | **86** | 86 |

The number of employees whose employee benefits (excluding employer pension costs) exceeded £60,000 was:

| | **2025 No.** | 2024 No. |
|---|---|---|
| In the band £60,001 - £70,000 | **1** | - |
| In the band £100,001 - £110,000 | **1** | 1 |

## 15. Trustee and key management personnel remuneration and expense

The trustees neither received nor waived any remuneration during the year and received no other benefits (2024: £NIL).

The key management personnel of the charity comprise the Senior Leadership Team. The Senior Leadership are defined as the Chief Executive, The Head of Community Engagement and Inclusion, the Head of HR and Facilities, the Head of Finance and the Head of Registered Care. The total employee benefits of the key management personnel were £337,616 (2024: £395,510). During the year, two members of the Senior Leadership Team left during the year, and therefore the figures are not entirely comparable year-on-year.

During the year, trustee expenses amounted to £37 paid to 2 trustees (2024: £nil).

## 16. Intangible assets

| | Software £ |
|---|---|
| ***Cost*** | |
| At 1 April 2024 | **78,803** |
| Additions | **15,672** |
| At 31 March 2025 | **94,475** |
| ***Amortisation*** | |
| At 1 April 2024 | **64,426** |
| Charge for the year | **10,296** |
| At 31 March 2025 | **74,722** |
| ***Net book value*** | |
| At 31 March 2025 | **19,753** |
| At 31 March 2024 | 14,377 |

## 17. Tangible fixed assets

| | Short-term leasehold property improvements £ | Motor vehicles £ | Fixtures and fittings £ | Office equipment £ | Computer equipment £ | Total £ |
|---|---|---|---|---|---|---|
| ***Cost*** | | | | | | |
| At 1 April 2024 | **703,824** | **81,873** | **225,693** | **147,415** | **78,949** | **1,237,754** |
| Additions | **36,461** | **-** | **67,958** | **7,312** | **19,240** | **130,971** |
| Disposals | **-** | **(4,995)** | **-** | **-** | **-** | **(4,995)** |
| At 31 March 2025 | **740,285** | **76,878** | **293,651** | **154,727** | **98,189** | **1,363,730** |
| ***Depreciation*** | | | | | | |
| At 1 April 2024 | **190,964** | **68,141** | **175,228** | **107,808** | **56,206** | **598,347** |
| Charge for the year | **68,030** | **2,378** | **19,474** | **11,126** | **10,179** | **111,187** |
| On disposals | **-** | **(1,009)** | **-** | **-** | **-** | **(1,009)** |
| At 31 March 2025 | **258,994** | **69,510** | **194,702** | **118,934** | **66,385** | **708,525** |
| ***Net book value*** | | | | | | |
| At 31 March 2025 | **481,291** | **7,368** | **98,949** | **35,793** | **31,804** | **655,205** |
| At 31 March 2024 | 512,860 | 13,732 | 50,465 | 39,607 | 22,743 | 639,407 |

## 18. Fixed asset investments

| | Traded investments £ | Concessionary loans £ | Total £ |
|---|---|---|---|
| ***Cost or valuation*** | | | |
| At 1 April 2024 | **4,602,448** | **2,249,509** | **6,851,957** |
| Additions | **1,064,765** | **-** | **1,064,765** |
| Disposals | **(1,453,490)** | **-** | **(1,453,490)** |
| Revaluations | **(12,785)** | **-** | **(12,785)** |
| Amounts written off | **(217,973)** | **-** | **(217,973)** |
| At 31 March 2025 | **3,982,965** | **2,249,509** | **6,232,474** |

**Investments at fair value comprise:**

| | Unrestricted funds 2025 £ | Restricted funds 2025 £ | Total funds 2025 £ | Total funds 2024 £ |
|---|---|---|---|---|
| ***Listed investments*** | | | | |
| Non-UK Quoted fixed interest securities | 225,517 | - | **225,517** | 412,503 |
| UK Quoted shares | 491,422 | 184,002 | **675,424** | 934,493 |
| Non-UK Quoted shares | 2,193,285 | 45,471 | **2,238,756** | 2,063,154 |
| | 2,910,224 | 229,473 | **3,139,697** | 3,410,150 |
| ***Other investments*** | | | | |
| UK Fixed Interest | 285,347 | 83,301 | **368,648** | 499,705 |
| UK cash held as part of portfolio | 469,221 | 5,399 | **474,620** | 692,593 |
| | 754,568 | 88,700 | **843,268** | 1,192,298 |
| ***Concessionary Loans*** | | | | |
| LJHA Development loans | 466,605 | 1,782,904 | **2,249,509** | 2,249,509 |
| | 4,131,397 | 2,101,077 | **6,232,474** | 6,851,957 |
| Total 2024 | 4,658,879 | 2,193,078 | 6,851,957 | |

All investments are carried at their fair value. Investment in equities and fixed interest securities are all traded in quoted public markets, primarily the London Stock Exchange. Holdings in common investments fund unit trusts and open-ended investment companies are at the bid price. Asset sales and purchases are recognised at the date of trade at cost (that is their transaction value).

The significance of financial instruments to the ongoing financial sustainability if the charity is considered in the financial review and investment policy and performance sections of Trustees' Annual Report.

The investment managers hold separate funds relating to sensory loss and learning disabilities. These funds are restricted funds.

The concessionary loan to Leeds Jewish Housing Association ("LJHA") amounts to £2,249,509 (2024: £2,249,509). This balance relates to four loans of £230,000, £21,773, £64,778 and £1,932,958 secured against individual properties. Loans are repayable if the lender provides 14 months' written notice. The latter three of the loans are interest free, and the loan for £230,000 carries an interest rate of the higher of 6.5% per annum or 1% above the National Westminster Bank Base Lending Rate.

Investment management costs incurred during the year totalled £26,784 (2024: £26,722).

The historical cost of listed investments totalled £3,623,283 (2024: £4,096,659), unrestricted funds included gains of £359,680 (2024: £505,789).

## 19. Debtors

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Trade debtors | **174,111** | 120,618 |
| Other debtors | **2,696** | 11,188 |
| Prepayments and accrued income | **117,418** | 123,432 |
| | **294,225** | 255,238 |

Prepayments and accrued income includes accrued income of £52,147 (2024: £50,045).

## 20. Creditors: Amounts falling due within one year

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Trade creditors | **131,800** | 179,408 |
| Other taxation and social security | **55,877** | 50,644 |
| Other creditors | **21,263** | 11,882 |
| Accruals | **83,860** | 71,315 |
| Deferred income | **88,936** | 95,566 |
| | **381,736** | 408,815 |

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Deferred income at 1 April | **95,556** | 77,129 |
| Income deferred during the year | **88,936** | 95,556 |
| Amounts released from previous periods | **(95,556)** | (77,129) |
| ***Balance as at 31 March*** | **88,936** | 95,556 |

Deferred income relared to fees paid in advance.

## 21. Statement of funds

### Statement of funds - current year

| | Balance at 1 April 2024 £ | Income £ | Expenditure £ | Transfers in/out £ | Gains/ (Losses) £ | Balance at 31 March 2025 £ |
|---|---|---|---|---|---|---|
| ***Unrestricted funds*** | | | | | | |
| ***Designated funds*** | | | | | | |
| Upgrades/new provisions | **150,035** | **-** | **-** | **(50,035)** | **-** | **100,000** |
| Designated fixed assets | **101,576** | **-** | **(16,537)** | **-** | **-** | **85,039** |
| | **251,611** | **-** | **(16,537)** | **(50,035)** | **-** | **185,039** |
| ***General funds*** | | | | | | |
| General Funds | **3,675,405** | **3,554,171** | **(4,164,158)** | **131,778** | **-** | **3,197,196** |
| Revaluation reserve | **505,789** | **-** | **-** | **(131,778)** | **(14,331)** | **359,680** |
| | **4,181,194** | **3,554,171** | **(4,164,158)** | **-** | **(14,331)** | **3,556,876** |
| ***Total Unrestricted funds*** | **4,432,805** | **3,554,171** | **(4,180,695)** | **(50,035)** | **(14,331)** | **3,741,915** |

## 21. Statement of funds (continued)

| | Balance at 1 April 2024 £ | Income £ | Expenditure £ | Transfers in/out £ | Gains/ (Losses) £ | Balance at 31 March 2025 £ |
|---|---|---|---|---|---|---|
| ***Restricted funds*** | | | | | | |
| Learning Disabilities | **291,810** | **22,766** | **(10,280)** | **-** | **3,216** | **307,512** |
| Community Engagement and Inclusion | **159,481** | **33,401** | **(49,652)** | **19,456** | **-** | **162,686** |
| Community Support Services | **71,490** | **65,539** | **(43,782)** | **45,746** | **(1,670)** | **137,323** |
| Head Office | **1,936** | **-** | **(1,936)** | **-** | **-** | **-** |
| Donisthorpe Hall - old people | **1,001,505** | **-** | **(51,747)** | **-** | **-** | **949,758** |
| Community Centre Fund | **1,799,269** | **3,324** | **-** | **(15,167)** | **-** | **1,787,426** |
| | **3,325,491** | **125,030** | **(157,397)** | **50,035** | **1,546** | **3,344,705** |
| ***Total of funds*** | **7,758,296** | **3,679,201** | **(4,338,092)** | **-** | **(12,785)** | **7,086,620** |

## 21. Statement of funds (continued)

### Statement of funds - prior year

| | Balance at 1 April 2023 £ | Income £ | Expenditure £ | Transfers in/out £ | Gains/ (Losses) £ | Balance at 31 March 2024 £ |
|---|---|---|---|---|---|---|
| ***Unrestricted funds*** | | | | | | |
| ***Designated funds*** | | | | | | |
| Upgrades/new provisions | 256,023 | - | - | (105,988) | - | 150,035 |
| Designated fixed assets | - | - | (4,412) | 105,988 | - | 101,576 |
| | 256,023 | - | (4,412) | - | - | 251,611 |
| ***General funds*** | | | | | | |
| General Funds - all funds | 3,791,615 | 3,476,050 | (3,575,747) | (16,513) | - | 3,675,405 |
| Revaluation reserve | 205,641 | - | - | 16,513 | 283,635 | 505,789 |
| | 3,997,256 | 3,476,050 | (3,575,747) | - | 283,635 | 4,181,194 |
| ***Total Unrestricted funds*** | 4,253,279 | 3,476,050 | (3,580,159) | - | 283,635 | 4,432,805 |

## 21. Statement of funds (continued)

| | | | | | | |
|---|---|---|---|---|---|---|
| ***Restricted funds*** | | | | | | |
| Learning Disabilities | 261,515 | 9,215 | (10,116) | - | 31,196 | 291,810 |
| Community Engagement and Inclusion | 143,466 | 43,744 | (27,729) | - | - | 159,481 |
| Community Support Services | 70,477 | 156,250 | (155,237) | - | - | 71,490 |
| Head Office | 1,936 | - | - | - | - | 1,936 |
| Donisthorpe Hall - old people | 1,134,471 | - | (132,966) | - | - | 1,001,505 |
| Community Centre Fund | 1,804,898 | 2,584 | (8,213) | - | - | 1,799,269 |
| | 3,416,763 | 211,793 | (334,261) | - | 31,196 | 3,325,491 |
| ***Total of funds*** | 7,670,042 | 3,687,843 | (3,914,420) | - | 314,831 | 7,758,296 |

**21. Statement of funds (continued)**

**Designated funds**

Designated fixed assets are assets which have been previously designated as those improvements required to the Cranmer site to ensure longevity of access and environment for residents. The remaining funds are designated for phase two improvements at the Learning Disability homes.

**Restricted funds**

**Learning Disabilities Project**
Our residential care homes for adults with learning disabilities are the only Jewish residential homes for people with learning disabilities in Leeds. Registered and inspected by Leeds City Council and the Care Quality Commission each Kosher home is maintained to a very high standard.

**Community Support Services and Community Engagement & Inclusion**
The Community Engagement and Community Support Services work co productively to enhance the wellbeing of the community. The services cross refer to ensure a holistic, person centred and joined up approach to meet the ever-changing needs of the community, with the central aim of promoting choice, greater control, independence and reducing social isolation. This is delivered through activity programmes, social groups and one to one support for people with various needs.

**Head office**
Head Office is about supporting the continuing strategic planning and development of our community services in providing registered care, community support, help advice activities and guidance for people of all ages.

**Donisthorpe Hall - old people**
The fund represents amounts donated in order to provide care for needey, infirm and/or elderly people in an orthodox Jewish environment. As described in note 26 there are certain restrictions around this donation such that a contingent liability exists around it.

**Community Centre Fund**
Specific donations were received for the construction and fit-out costs of the Marjorie and Arnold Ziff Community Centre.

**Transfers**

A transfer of £131,778 has been made between general funds and the revaluation reserve to represent the total unrealised gains within unrestricted funds.

A transfer of £50,035 has been made within designated funds to represent a decision takes by the Trustees to release previously designated funds for capital additions back into general funds. A transfer for this amount has also been made from unrestricted funds to restricted funds to represent gains on the restricted investments achieved in previous years.

## 22. Summary of funds

### Summary of funds - current year

| | Balance at 1 April 2024 £ | Income £ | Expenditure £ | Transfers in/out £ | Gains/ (Losses) £ | Balance at 31 March 2025 £ |
|---|---|---|---|---|---|---|
| Designated funds | **251,611** | **-** | **(16,537)** | **(50,035)** | **-** | **185,039** |
| General funds | **4,181,194** | **3,554,171** | **(4,164,158)** | **-** | **(14,331)** | **3,556,876** |
| Restricted funds | **3,325,491** | **125,030** | **(157,397)** | **50,035** | **1,546** | **3,344,705** |
| | **7,758,296** | **3,679,201** | **(4,338,092)** | **-** | **(12,785)** | **7,086,620** |

### Summary of funds - prior year

| | Balance at 1 April 2023 £ | Income £ | Expenditure £ | Transfers in/out £ | Gains/ (Losses) £ | Balance at 31 March 2024 £ |
|---|---|---|---|---|---|---|
| Designated funds | 256,023 | - | (4,412) | - | - | 251,611 |
| General funds | 3,997,256 | 3,476,050 | (3,575,747) | - | 283,635 | 4,181,194 |
| Restricted funds | 3,416,763 | 211,793 | (334,261) | - | 31,196 | 3,325,491 |
| | 7,670,042 | 3,687,843 | (3,914,420) | - | 314,831 | 7,758,296 |

## 23. Analysis of net assets between funds

### Analysis of net assets between funds - current year

| | Unrestricted funds 2025 £ | Restricted funds 2025 £ | Total funds 2025 £ |
|---|---|---|---|
| Tangible fixed assets | 655,205 | - | **655,205** |
| Intangible fixed assets | 19,753 | - | **19,753** |
| Fixed asset investments | 4,131,397 | 2,101,077 | **6,232,474** |
| Current assets | (682,704) | 1,243,628 | **560,924** |
| Creditors due within one year | (381,736) | - | **(381,736)** |
| ***Total*** | 3,741,915 | 3,344,705 | **7,086,620** |

## 23. Analysis of net assets between funds (continued)

### Analysis of net assets between funds - prior year

| | Unrestricted funds 2024 £ | Restricted funds 2024 £ | Total funds 2024 £ |
|---|---|---|---|
| Tangible fixed assets | 639,407 | - | 639,407 |
| Intangible fixed assets | 14,377 | - | 14,377 |
| Fixed asset investments | 4,658,879 | 2,193,078 | 6,851,957 |
| Current assets | (471,043) | 1,132,413 | 661,370 |
| Creditors due within one year | (408,815) | - | (408,815) |
| ***Total*** | 4,432,805 | 3,325,491 | 7,758,296 |

## 24. Reconciliation of net movement in funds to net cash flow from operating activities

| | **2025 £** | 2024 £ |
|---|---|---|
| Net (expenditure)/income for the year (as per Statement of Financial Activities) | **(671,676)** | 88,254 |
| ***Adjustments for:*** | | |
| Depreciation charges | **111,187** | 101,199 |
| Amortisation charges | **10,296** | 6,009 |
| Losses/(gains) on investments | **12,785** | (314,831) |
| Dividends, interests and rents from investments | **(116,971)** | (103,103) |
| Loss on the sale of fixed assets | **2,257** | - |
| (Increase)/decrease in debtors | **(38,987)** | 131,962 |
| (Decrease)/increase in creditors | **(27,079)** | 91,448 |
| Interest paid | **-** | 14,008 |
| ***Net cash (used in)/provided by operating activities*** | **(718,188)** | 14,946 |

## 25. Analysis of cash and cash equivalents

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Cash in hand | **266,699** | 406,132 |
| Cash in investments | **474,620** | 692,593 |
| ***Total cash and cash equivalents*** | **741,319** | 1,098,725 |

## 26. Analysis of changes in net debt

| | **At 1 April 2024** | **Cash flows** | **At 31 March 2025** |
|---|---|---|---|
| | **£** | **£** | **£** |
| Cash at bank and in hand | **406,132** | **(139,433)** | **266,699** |
| | **406,132** | **(139,433)** | **266,699** |

There was no debt in the current or prior year.

## 27. Contingent assets and liabilities

Under the conditions of the gift, 50% of the donation from Donisthorpe Hall during 2023 is to be retained for a period of 6 years to 29 December 2028. Should a claim arise against the assets of that entity some or all of this amount may be clawed back. This eventuality is considered unlikely, such that the whole gift was recognised in the year to 31 March 2023 within restricted funds.

The charity has previously received donations from Donisthorpe Hall and has been made aware that further income may be forthcoming. However, at the reporting date, the Trustees are of the opinion that the receipt of any additional donation cannot be measured reliably, nor is its receipt sufficiently certain. As a result of this, no income has been recognised in the financial statements in respect of this potential donation.

## 28. Pension commitments

The charity contributes to the following pension schemes: a defined contribution pension scheme, an unfunded NHS scheme, the National Employment Savings Trust (NEST) government scheme and a salary sacrifice pension scheme.

The National Employment Savings Trust (NEST) government scheme is a defined contribution scheme. The pension cost charge represents contributions payable by the charity to the fund and amounted to £40,700 (2024: £31,898). Contributions of £8,757 were payable to this fund at the year end (2024: £11,434).

The charity operates a further defined contribution pension scheme. The pension cost charge represents

**28. Pension commitments (continued)**

contributions payable by the charity to the fund and amounted to £30,446 (2024: £31,559). Contributions totalling £4,797 was payable at the year end (2024: £7,083 owed back from this fund).

**29. Operating lease commitments**

At 31 March 2025 the charity had commitments to make future minimum lease payments under non-cancellable operating leases as follows:

| | **2025** | 2024 |
|---|---|---|
| | **£** | £ |
| Not later than 1 year | **34,783** | 28,490 |
| Later than 1 year and not later than 5 years | **46,115** | 29,138 |
| | **80,898** | 57,628 |

**30. Related party transactions**

During the year, aggregate donations by Trustees to the charity without condition amounted to £5,272 (2024:£2,110).

During the year aggregate donations by businesses in which a Trustee is also a Director received without condition amounted to £34,000 (2024: £30,000).

During the year salary costs and other expenditure totalling £153,116 (2024: £nil) were recharged to Leeds Kosher Kitchen, an entity in which Helen Lewis and Amanda Jerome are directors of which a grant in kind was made of £135,000 (2024: £nil) to offset against this. In addition, rental income was received totalling £3,000 (2024: £nil) and expenditure incurred totalling £22,898 (2024: £nil). At year end amounts of £16,769 was owed by Leeds Jewish Welfare Board (2024: £nil).

**31. Post balance sheet events**

On 14 November 2025, the charity completed the acquisition of The Marjorie & Arnold Ziff Community Centre (MAZCC) from Leeds Jewish Housing Association for a purchase price of £2,036,620.

As part of this transaction, concessionary loans totalling £2,249,509 were repaid by Leeds Jewish Housing Association and restricted funds amounting to £1,799,269, previously held for the MAZCC, were deemed to have met the conditions of their restrictions upon completion of the purchase and have therefore been released to unrestricted funds.

# Honorary Presidents and Patrons

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Edward Ziff OBE DL

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Elaine Grazin

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