

The Jane Goodall Institute (UK)

Annual Report and Financial Statements

Year Ended

31 December 2020

Charity Number 327858

The Jane Goodall Institute (UK)

Report and financial statements for the year ended 31 December 2020

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The Jane Goodall Institute (UK)

Legal and administrative information for the year ended 31 December 2020

Trustees

The trustees at the date of this report are given below. Where the trustee has not served throughout the financial year the date of appointment has been given:

	Date of Appointment	Date of Resignation
Dr Jane Goodall DBE, Founder, the Jane Goodall Institute & UN Messenger of Peace		
Sally Barney		24 January 2020
Alessio di Capua		24 January 2020
Vincent Forestier (Chair)		9 September 2021
Ben Garrod		23 July 2020
Paul Hetherington		24 January 2020
Mary Lewis - Dr. Goodall's representative (Joint Chair from 9 September 2021)		
Susanna Raimés		24 January 2020
Saras Seth		28 May 2020
Adrian Sladdin		24 January 2020
Nicky Whitehead (Treasurer & Joint Chair from 9 September 2021)	27 May 2020	
Dr Roger Wood		7 August 2020
John Yates		24 January 2020

Registered Charity Number

327858

Principal Office

Suite 2, M Shed, The Shipyard, Lymington, Hampshire SO41 3YL

Banker

National Westminster Bank Plc, 1 Princes Street, London, EC2R 8ZA

Independent Examiner

David I'Anson ACA, BDO LLP, Arcadia House, Maritime Walk, Southampton, SO14 3TL

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020

The trustees are pleased to present their report together with the financial statements of The Jane Goodall Institute (UK) ("the Institute") for the year ended 31 December 2020.

Structure, Governance and Management

Constitution

The Institute is a registered charity (Number 327858), an unincorporated association regulated by a declaration of trust dated 25 May 1988. Investment powers are limited to those available under charity legislation.

The Institute is one of a network of international The Jane Goodall Institutes ("JGIs") with offices in 24 countries throughout Africa, the Americas, Asia and Europe.

The Board of Trustees is the governing body of the organisation and has legal and financial responsibility for the charity. The Board determines strategic direction, with operational management of the charity delegated to the staff team (and from May 2021 via our new CEO). The Trustees normally meet eight times per year.

The power of appointing new and additional trustees is vested in the continuing trustees.

The Institute is pleased to announce the appointment of a new Chief Executive Officer, Corinna McShane, from 24 May 2021.

Principal Objectives

We refer to the guidance contained in the Charity Commission's guidance on public benefit when reviewing our aims and objectives and in planning our future activities. In particular, the Trustees consider how planned activities will contribute to the aims and objectives they have set.

The purpose of the Institute as specified in the Trust Deed is the advancement of education for the public benefit, of supporting study of research into wildlife and into conservation of wildlife in any part of the world, and the dissemination to the public of the result of such study and research. The Institute supports the delivery of a range of programmes both directly and indirectly through other Jane Goodall Institutes around the world.

In particular to:

- support scientific research into wild chimpanzees in Gombe National Park, Tanzania
- support sanctuaries for orphan chimpanzees illegally taken from the wild
- support behavioral studies on chimpanzees in captivity
- support educational programmes relating to the above.

In addition to the above, these purposes are also lived out through supporting the innovative and world-renowned *TACARE* programme (a holistic programme of conserving forest habitats by empowering local communities to develop projects including tree nurseries, microcredit, health care and education); supporting conservation programmes around chimpanzee habitats in Africa and delivery of our highly successful *Jane Goodall's Roots & Shoots* environmental and humanitarian youth education programme in the UK and the UAE.

Jane Goodall's Roots & Shoots empowers networks of young people to make a better world for people, animals and the environment. It aims to integrate educational goals, environmental awareness and community involvement by encouraging practical activities through which schools and young people's groups can make their own contribution so that young people of all ages become aware of their actions and how they affect their local community and the environment as a whole. *Jane Goodall's Roots & Shoots* is now active in more than 60 countries around the world. The Institute delivers *Jane Goodall's Roots & Shoots* in the UK and the UAE, providing free resources for teachers and team leaders growing the next generation of compassionate changemakers.

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020 (*continued*)

Achievements and Performance

We are honoured that Dr Jane Goodall, DBE is a member of the Board of Trustees. The Board continues to offer expertise across the areas required for the success of the Institute in the projects it supports in conservation, education and ecology and in its governance and fundraising responsibilities. During the year, the Institute appointed a new treasurer (Nicky Whitehead an FCA Chartered Accountant).

Due to the Covid-19 pandemic, 2020 was a tumultuous year that affected everyone. We would like to thank our staff team for their continued dedication to the charity and our Members, Chimpanzee Guardians and donors for their on-going support.

Covid-19 and remote working

During the year, there were unforeseen challenges due to Covid-19 but also many achievements to be proud of. We worked within restrictions and lockdowns, adapting our services wherever possible and throughout the year our small staff team continued to work remotely.

Fundraising programmes and practices

The Institute receives no government funding and relies on the kind generosity of individuals and companies to help keep the Institute funded. The Institute's fundraising strategy is overseen by its Board of Trustees and delivered by the staff team which seek support from individuals, companies and charitable trusts. We are very grateful to all our Members, Chimpanzee Guardians and donors who have supported the Institute during this very challenging year. We never cease to be grateful to all those who so kindly remember the Institute in their wills.

The Institute conducts all of its fundraising activity in line with the Fundraising Regulator Code of Fundraising Practice and is pleased to confirm that it has received no complaints in relation to its fundraising activity over the course of the year to 31 December 2020.

The Institute has been fortunate to secure two new sources of three-year funding (largely relating to Roots & Shoots) post 31 December 2020, that will commence in 2021.

The Institute's resources and efforts will remain focussed on delivering the objectives detailed under the Plans for Future Periods below.

Membership and Chimpanzee Guardianship

The Institute continues to encourage its supporters to become Members and Chimpanzee Guardians and this remains a priority for the Institute. The Trustees have continued with the policy of allocating 75% of the Chimpanzee Guardianship income to support specific projects at the Tchimpounga Chimpanzee Rehabilitation Project in the Republic of Congo. Membership and Chimpanzee Guardianship numbers increased during the year - perhaps a reflection of people becoming increasingly connected with nature during the pandemic.

Tchimpounga sanctuary

The Tchimpounga project in Republic of Congo (run by the *Jane Goodall Institute, Republic of Congo*) is the largest chimpanzee sanctuary in Africa. It includes three islands in the River Kouilou which provide a more natural environment, whilst allowing the continued care, rehabilitation and non-invasive behavioural research of rescued chimpanzees.

Chimpanzees, orphaned as a result of the bushmeat trade or rescued from maltreatment, have now been released on all three of the islands and are allowing for a much-improved environment for them to develop and allowing the sanctuary to continue to accept more chimpanzees.

The fundraising efforts of the Institute, along with those of JGI's around the world, support these innovative plans which increase the capacity and further improve the welfare offered by the chimpanzee sanctuary in Tchimpounga and offer the opportunity for the chimpanzees to a life closer to their natural habitat.

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020 (*continued*)

Achievements and Performance (*continued*)

To protect the primates and staff from the spread of the Covid-19, new safety and quarantine protocols were introduced at the Tchimpounga sanctuary. By the end of March 2020, the sanctuary and the island rehabilitation sites had become strict quarantine zones. The sanctuary and island staff began working in fixed fifteen-day rotations onsite, with staff strictly limited to specific zones within the interior of the sanctuary and per island camp. All non-rotation staff (including drivers and boat pilots) were prohibited from entry into the sanctuary and island sites, with all foot and vehicle access closed. Even fruit deliveries were left at the exterior of the quarantine zone to be disinfected and transported to the kitchens by a specifically designated vehicle (used only for fruit transport) at the sanctuary and by special crates at the islands. The fruits then passed through further disinfection before preparation and serving. During the year it was possible to relax some of the quarantine restrictions, but Covid-19 safety protocols remained in place.

Gombe Stream National Park

The Institute also provides support for the incredible study of chimpanzees at Gombe Stream in Tanzania which has operated for nearly sixty continuous years making it one of the longest running studies of animals in the wild. These studies continue to provide valuable insights into our closest relatives' emotions, behaviours and social structures.

Ongoing research and extensive conservation work is carried on at Gombe Stream by *the Jane Goodall Institute, Tanzania*, which employs local people as part of the research team. The research projects are helping answer such compelling questions as how certain diseases are spread, how to stop forest destruction with its effects on climate change and how to improve the plight of women in developing countries. The impact of the Gombe Stream Project research spans the globe and covers a wide range of scientific disciplines, including human evolution, ethology, anthropology, behavioural psychology, sociology, conservation, disease transmission (including HIV-AIDS), aging and geospatial mapping.

Research activities, like other aspects of life, were not spared by the Covid-19 pandemic. JGI Tanzania had to suspend its main behavioural research activities in Gombe in March 2020 to avoid any risk of transmitting the disease to chimpanzees. By the end of April limited research was recommenced with a reduced skeleton staff, with full operations resuming by November 2020. Throughout the year new Covid-19 protocols were introduced to protect staff and to limit risks of disease transmission between people and chimpanzees.

Jane Goodall's Roots & Shoots

Jane Goodall's Roots & Shoots programme continues to involve young people of all ages in the UK and around the world with an innovative and award-winning programme. The programme empowers young people to become involved in hands on projects to benefit their local community, animals and the environment leading to them becoming better, more informed global citizens. The Institute delivers *Jane Goodall's Roots & Shoots* in the UK and the UAE.

The programme started with 30 pilot schools before being launched nationally in 2007. Almost 1,500 schools and colleges have taken part in *Jane Goodall's Roots & Shoots* activities. The reach of the programme extends beyond the young people to include parents, family and friends, local business and communities.

Through participation in group activities at schools, colleges, universities and in the wider community, *Jane Goodall's Roots & Shoots* programme helps young people develop transferable skills including relationship building, teamwork, leadership and planning and life skills such as respect and compassion. The young people are more aware, more informed and more proactive in their influence on their environment through involvement with the programme. Through their informed and passionate decisions all the young people who are involved in *Jane Goodall's Roots & Shoots* are able to make a difference. They undertake three projects of their choosing one for the community, one for animals (including domestic animals) and one for the environment.

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020 (*continued*)

Achievements and Performance (*continued*)

The Jane Goodall's Roots & Shoots programme communicates with young people using a wide variety of media including traditional communications through newsletters and school resource packs, both physical and online versions, and increasingly through the use of social media including Twitter and Facebook. Communications are undertaken directly and in conjunction with our partners such as Emirates Literature Foundation, National Geographic Kids, St George's House, Windsor Castle, RSPCA, Montessori, Earthwatch, Theatre in a Box, Don Hanson Charitable Foundation, Leicester Council and Times Educational Supplement.

Covid-19 proved extremely challenging for the education sector, with schools being practically closed for the duration of the pandemic. To support our members, we created our 'Roots & Shoots at Home' and 'Planning My Local Area' resources, and encouraged the 'Roots & Shoots 30' activities. Online workshops were delivered to interested schools and we worked remotely to prepare for the Roots & Shoots 30th Anniversary; Dr Jane's Birthday and our Annual Awards 2021.

Of course, Covid-19 impacted the volume of work and projects that can be done at the schools and outside, but overall we kept the spirit of the programme alive and used the time to highlight the importance of the environment and continuing activities in parks, green spaces and gardens within the pandemic restrictions and indeed lockdown.

The Twinning Programme between UK & UAE schools started well. Covid-19 had an impact as students were having to study remotely and the group calls could not take place in the same way. However, there are a good number of school matches that we are re-connecting in the 2021/2022 academic year.

A small sample of the projects through which Jane *Goodall's Roots & Shoots* help young people make a difference to their environment include:

- *Springwatch* – by recording and studying the first appearance of birds, animals, insects and plants in the spring and seeing if these have changed over time we can explore why this might be. This provides a basis for understanding the connections in nature and for discussions on climate change, it's effect on the world around us and how we have an impact of these changes.
- *Forest Activity* – examining woodlands and forests and understanding how they affect animals, people and the environment. Determining what might be done to reduce deforestation and protect the woodlands and forests around us.
- *Iceworld Activity* - identifying the difficulties wildlife can face during cold weather and how students might be able to help them through these adversities. This activity enables young people to have a beneficial impact on local wildlife through small and simple steps from which they can clearly see the positive effect of their actions.

New resources are written every year in keeping with environmental challenges and trends and the issues that need addressing. Examples for 2020 included:

- *Greening My Local Area* - this activity encouraged students to identify local places where additional plants and trees can be grown, carry out a planting activity and monitor development over time on a map overlay. For the first time we launched an exciting competition where 12 groups were able to win £250 each to put towards purchasing plants and gardening equipment.
- *My Local Area Over Time* - this activity encouraged students to investigate their local area further by asking local older people who have lived in the area for some time about how the local environment has changed over the years.
- *Roots & Shoots at Home* - these activities gave students different projects and actions that they can do at home with a little parental supervision. They provided something positive to focus on and each activity was linked to different parts of the curriculum.

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020 (*continued*)

Achievements and Performance (*continued*)

Dr Jane Goodall DBE

Dr Jane Goodall (a Trustee of the Institute) continues to work tirelessly as an international advocate on behalf of chimpanzees and the environment and seeks to nurture new generations of committed, active citizens around the world. Her ongoing role as a UN Messenger of Peace brings an opportunity for *Jane Goodall's Roots & Shoots* around the world to engage with the United Nations and become involved in annual events celebrating the role of peace in our communities.

Dr Goodall usually travels 300 days a year on a worldwide speaking tour to raise awareness, inspire change and encourage each of us to do our part in making the world a better place. Due to the pandemic Dr Goodall remained in the UK during much of 2020 but she reached millions of people around the world via Zoom lectures, talks, interviews and online events. At the end of the year, Dr Goodall launched her very own 'HopeCast' – a very special mix of incredible guests, one-of-a-kind conversations and 'mailbag episodes' from listeners proved to be a global sensation. The Institute is hugely grateful to Dr Goodall for undertaking several online events and talks with UK and UAE based organisations during the year that helped generate funding for the charity.

Plans for Future Periods

The Board of Trustees were delighted to appoint the Institute's first Chief Executive for many years, Corinna McShane, who joined the Institute on 24 May 2021. This new role covers all aspects of the Institute's work from supporting JGI chimpanzee sanctuaries and community led conservation projects in Africa, to our Roots & Shoots school programmes in the UK and UAE.

With the appointment of our new CEO, the future development of the Institute will be based around the following main areas in 2021:

Developing the foundations for increased growth

- Developing a strategic roadmap for 2022-2024.
- Streamlining existing and establishing new internal processes.
- Supporting the staff team with training and development.
- Reviewing key messaging and refreshing existing communications channels.
- Planning for a JGI wide rebrand, including the development of a future new website in 2022.
- Deepening relationships with other JGIs around the world.
- Working closely with the Office of the Founder to support key events/media activity with Dr Goodall taking place in and/or virtually from the UK.
- Recruiting new Trustees in line with identified skills needs.

Income Generation

- Developing a new fundraising plan, widening the breadth of sustainable income sources.
- Prioritising applications for corporate partnerships/charity of the year opportunities.
- Deepening relationships with key supporters and funding partners.
- Maintaining/increasing the number of Members and Chimpanzee Guardians.
- Reviewing Member and Chimpanzee Guardians packages/benefits.
- Taking part in the online JGI European auction alongside other JGIs.
- Reviewing and enhancing the Institute's merchandise range.
- Introducing increased reporting and analytics.
- Managing and enhancing relationships with the two new Roots & Shoots funders (secured post 31 December 2020, commencing in 2021).

The Jane Goodall Institute (UK)

Trustees' annual report for the year ended 31 December 2020 (*continued*)

Plans for Future Periods (*continued*)

Profile raising

- Developing integrated digital campaigns to promote the same messaging/call to action across the various different Institute channels (Roots & Shoots has separate social media pages in the UK and UAE).
- Improving social media presence and supporter engagement through revitalising the Institute's Facebook page.
- Leveraging Dr Goodall's forthcoming new book to increase media interest and generate increased public awareness.
- Managing re-active press enquiries and seeking pro-active opportunities to engage with the media.

Conservation

- Increasing financial support (subject to income) for research, conservation and sanctuaries in Africa ran by other Jane Goodall Institutes. Senegal and South Africa have been identified by the Board of Trustees as priority support areas for 2020.
- Continuing support for the Tchimpounga Chimpanzee Sanctuary through allocating 75% of the Institute's Chimpanzee Guardianship income.

Campaigning/Policy

- Supporting JGI global campaigns relating to animal welfare, conservation and environmental protection.
- Increasing engagement with existing supporters and Members regarding taking part in JGI led campaigns.
- Exploring the opportunity for the Institute to become involved with COP 26 taking place in the UK at the end of 2020.

Roots & Shoots development

- Continuing long term funding of the *Jane Goodall's Roots & Shoots* Programme in the UK and UAE
- Networking through existing and new *Jane Goodall's Roots & Shoots* groups
- Increasing publicity via media and website
- Progressing UK *Jane Goodall's Roots & Shoots* Summit and Awards programme
- Development of "inspirational events"
- Ensuing delivery of successful delivery of activities relating to the two new Roots & Shoots funders (secured post 31 December 2020, commencing in 2021).
- Creating new resources in the areas of renewable energy, eco-eating and marine conservation.
- Expanding the twinning programme between the UK and UAE
- Leveraging new partnership opportunities to increase our impact on a global scale in the UAE and Africa.

Financial Review

Due to the pandemic, this has been a very challenging year for everyone, but we are so grateful to have seen an uplift in our 2020 income compared to the previous year. During the year the Institute's programme of grants to other Jane Goodall Institutes and expenditure totalled £256,728 (2019 - £223,384) against its income of £316,454 (2019 - £271,791) resulting in a surplus for the year of £59,726 (2019 – surplus £48,407). The accumulated funds at 31 December 2020 amount to £220,781 (2019 - £161,055).

The trustees have continued to commit more of the Institute's expenditure each year to charitable activities than is spent on its fundraising and overheads. Alongside an active programme of fundraising, the Institute continues to closely monitor expenditure and to minimise costs incurred other than those directly related to charitable activities. Expenditure on charitable activities for the year amounts to £199,687 (2019 - £188,846) and other expenditure £57,041 (2019 - £34,538).

The Jane Goodall Institute (UK)

Report of the trustees for the year ended 31 December 2020 (*continued*)

Reserves policy

It is the policy of the Institute to hold unrestricted funds, its free reserves, equivalent to between six and twelve month's unrestricted expenditure so as to provide only such funds as are necessary to cover management and administration costs, both planned and unforeseen, and to cover project costs.

At the balance sheet date, the Institute held unrestricted funds of £207,664 (2019: £153,201). This represents 20 months of unrestricted expenditure at 2020 levels.

Trustees' responsibilities in relation to the financial statements

Law applicable to charities in England and Wales requires the trustees to prepare financial statements for each financial year which give a true and fair view of the charity's financial activities during the year and of its financial position at the end of the year. In preparing those financial statements, the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- make judgments and estimates that are reasonable and prudent;
- state whether applicable accounting standards and statements of recommended practice have been followed subject to any departures disclosed and explained in the financial statements; and
- prepare the financial statements on the going concern basis unless it is inappropriate to presume that the charity will continue in business.

The trustees are responsible for keeping accounting records which 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 Charities Act 2011. They are also responsible for safeguarding the assets of the charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

This report has been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities (issued in October 2019).

The annual report on pages 1 to 8 was approved by the trustees, as a body, and signed on their behalf by:



Nicky Whitehead
Treasurer Trustee

Date: 28th October 2021

The Jane Goodall Institute (UK)

Independent examiner's report To the Trustees of The Jane Goodall Institute (UK)

I report to the trustees on my examination of the accounts of The Jane Goodall Institute (UK) ("the Institute") for the year ended 31 December 2020, which are set out on pages 10 to 24.

This report is made solely to the charity trustees, as a body, in accordance with Regulation 31 of the Charities (Accounts and Reports) Regulations 2008. My work has been undertaken so that I might state to the charity's trustees those matters I am required to state to them in an independent examiner's report and for no other purpose. To the fullest extent permitted by law, I do not accept or assume responsibility to anyone other than the charity's trustees as a body, for my work, for this report, or for the statement I have made.

Responsibilities and basis of report

As the charity trustees of the Institute you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

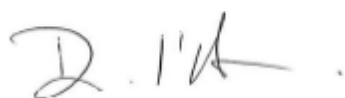
I report in respect of my examination of the Institute's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent Examiner's Statement

Since the Institute's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the listed bodies. I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe:

- 1 accounting records were not kept in respect of the Institute as required by section 130 of the Act; or
- 2 the accounts do not accord with those records; or
- 3 the accounts do not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination; or
- 4 the accounts have not been prepared in accordance with the methods and principles of the Statement of Recommended Practice for accounting and reporting by charities applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS102).

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



David I'Anson ACA

Institute of Chartered Accountants in England and Wales

BDO LLP

Arcadia House, Maritime Walk, Southampton

SO14 3TL

Date: 28 October 2021

The Jane Goodall Institute (UK)

Statement of financial activities incorporating the income and expenditure account for the year ended 31 December 2020

	Note	Unrestricted funds £	Restricted funds £	Total 2020 £	Total 2019 £
Income from:					
Donations and legacies	2	144,994	117,284	262,278	255,318
Charitable Activities	3	33,664	-	33,664	12,500
Other trading activities	4	20,364	-	20,364	3,779
Investments		136	12	148	194
Total income		199,158	117,296	316,454	271,791
Expenditure on:					
Raising funds	6	55,881	1,149	57,030	34,538
Charitable activities	7	67,227	132,471	199,698	188,846
Total expenditure		123,108	133,620	256,728	223,384
Transfers	16	(21,587)	21,587	-	-
Net income and net movement in funds for the year		54,463	5,263	59,726	48,407
Reconciliation of funds					
Total funds brought forward		153,201	7,854	161,055	112,648
Total funds carried forward		207,664	13,117	220,781	161,055

The notes on pages 12 to 24 form part of these financial statements.

The Jane Goodall Institute (UK)

Balance sheet at 31 December 2020

<i>Charity number 327858</i>	Note	2020 £	2020 £	2019 £	2019 £
Fixed assets					
Tangible assets	12		3,390		-
Current assets					
Stock	13	8,029		6,882	
Debtors	14	13,177		6,940	
Cash at bank and in hand		227,982		172,420	
		249,188		186,242	
Creditors: amounts falling due within one year	15	31,797		25,188	
Net current assets			217,391		161,055
Net assets			220,781		161,055
Funds					
Restricted funds	16		13,117		7,854
Unrestricted funds	17		207,664		153,201
Total funds carried forward			220,781		161,055

The financial statements on pages 10 to 23 were approved by the Trustees, as a body, and signed on their behalf by:



Nicky Whitehead
Treasurer Trustee

Date: 28th October 2021

The notes on pages 12 to 24 form part of these financial statements.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020

1 Accounting policies

The principal accounting policies are set out below. The accounting policies have been adopted consistently throughout the year.

Basis of accounting

The financial statements have been prepared under the historical cost convention.

The financial statements have been prepared in accordance with the Statement of Recommended Practice: Accounting and Reporting by Charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) effective 1 January 2019, the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011.

The trust constitutes a public benefit as defined by FRS 102.

Going concern

In line with similar organisations, the charity relies on securing funding each year to meet its charitable expenditure. The Trustees are pleased to report that new funding has been secured in 2021 and they are confident of securing further amounts. The trustees have considered cash flow requirements for the period to the end of 2022 and believe the charity can meet its commitments for this period. Accordingly, the trustees consider it appropriate to prepare the accounts on the going concern basis.

Funds employed

All funds employed must be expended in furtherance of the charitable objects of the Institute.

Restricted funds are funds which the trustees are free to use for any purpose in the furtherance of the Charitable objectives.

Restricted funds may only be used for the particular purpose where this is specified by the donors or when funds are raised for a particular purpose.

Designated funds represent amounts set aside by the trustees for a particular purpose. They form part of the charity's unrestricted funds and may be reallocated.

The nature and purpose of each of the funds are set out in note 16 & 17.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020 (*continued*)

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.

Donations are typically recognised when received, being the point at which the three criteria for income recognition above are met. Income from grants is recognised when there is evidence of entitlement, receipt is probable and its amount can be measured reliably, unless it relates to a specific future period, in which case it is deferred.

In the event that a donation or grant is subject to conditions that require a level of performance before the charity is entitled to the funds, the income is deferred and not recognised until either those conditions are fully met, or the fulfilment of those conditions is wholly within the control of the charity, and it is probable that those conditions will be fulfilled in the reporting period.

Legacy gifts are recognised on a case-by-case basis following the granting of probate when the administrator/executor for the estate has communicated in writing both the amount and settlement date. In the event that the gift is in the form of an asset other than cash or a financial asset traded on a recognised stock exchange, recognition is subject to the value of the gift being reliably measurable with a degree of reasonable accuracy and the title to the asset having been transferred to the charity.

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

Expenditure recognition

Expenditure is included on an accruals basis. Liabilities are recognised as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably.

Irrecoverable VAT is treated as part of the expense to which it relates.

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

Support costs comprise costs for raising funds, processing and administering project grants and applications (including support to actual and potential applicants). The management and administration costs for the running of charity itself are recorded as governance costs.

The rental charges of operating leases are taken to the Statement of Financial Activities as incurred.

Allocation of support and governance costs

Support costs and governance costs have been allocated between fund raising and charitable activities. Governance costs comprise all costs involving the public accountability of the charity and its compliance with regulation and good practice. These costs include costs related to the independent examiner and legal fees together with trustees' fiduciary insurance.

Costs have been allocated on the following basis:

- Staff costs – 60% Fund raising and 40% Charitable activities
- Office and administration costs – 59% Fund raising and 41% Charitable activities
- Rent – 50% Fund raising and 50% Charitable activities
- Insurance – 50% Fund raising and 50% Charitable activities
- Governance costs – 100% Charitable activities

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020 (*continued*)

Charitable activities

The charitable activities of the organization include the African Conservation Programme and the Education Programme which includes the Roots & Shoots Programme. Costs of charitable activities include grants made, direct costs of delivering projects, governance costs and an apportionment of support costs.

Fixed assets

Fixed assets are included in the balance sheet at their cost to the Institute until fully depreciated, when they are written off. Assets costing less than £50 are not capitalised. Depreciation is provided on a straight-line basis, over a period estimated to write off each asset over the term of its useful life.

Computer equipment	-	33% on cost
Office equipment	-	20% on cost

Stock

Stock, which represents books and merchandise, is valued at the lower of cost and net realisable value.

Foreign currency

Foreign currency transactions of the trust are translated at the rates ruling when they occurred. Foreign currency monetary assets and liabilities are translated at the rates ruling at the balance sheet dates. Any differences are taken to the prior and loss account.

Pensions

Contributions to the Institute's defined contribution pension scheme are dealt with in the Statement of Financial Activities in the year in which they become payable. The assets of the scheme are held separately from those of the Institute in an independently administered fund.

Cash flow statements

The accounts do not include a cash flow statement because the charity, as a small reporting entity, is exempt from the requirement to prepare a cash flow statement under the Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102).

Leased assets

All of the charity's leases are treated as operating leases. Their annual rentals are charged to the profit and loss account on a straight-line basis over the term of the lease.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

2 Income from donations and legacies

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Membership subscriptions	5,264	1,785	7,049	6,323
Legacies	98,016	-	98,016	8,317
Donations	40,714	111,059	151,773	237,819
Guardianship programme	-	4,440	4,440	2,860
The Peak Society	1,000	-	1,000	-
Total	<u>144,994</u>	<u>117,284</u>	<u>262,278</u>	<u>255,318</u>

3 Income from charitable activities

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Speaker Income	33,664	-	33,664	12,500
Total	<u>33,664</u>	<u>-</u>	<u>33,664</u>	<u>12,500</u>

4 Income from other trading activities

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Presentations and events	17,699	-	17,699	-
Proceeds of sale of books and merchandise	2,665	-	2,665	3,779
Total	<u>20,364</u>	<u>-</u>	<u>20,364</u>	<u>3,779</u>

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020 (*continued*)

5 Support costs

The breakdown support costs of the charity and how these were allocated between fund raising and charitable activities is shown below: fund raising costs and charitable activities. These costs have been apportioned across the work of the charity on the basis disclosed in note 1 and allocated to each of the charity's activities as set out in the table below:

Support Cost Allocation	Raising Funds	Charitable activities	Total 2020	Total 2019
	£	£	£	£
Staff costs	16,573	11,048	27,621	30,863
Office and administration	15,074	10,474	25,548	11,273
Rent	3,476	3,476	6,952	5,223
Insurance	595	595	1,190	1,200
Consultancy Fees	11,043	9,288	20,331	-
Governance costs	-	12,812	12,812	3,090
	<hr/>	<hr/>	<hr/>	<hr/>
Total	46,761	47,693	94,454	51,648
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

6 Expenditure on raising funds

	Unrestricted funds	Restricted funds	2020	2019
	£	£	£	£
Support cost allocation	46,761	-	46,761	31,134
Purchases of books and merchandise for resale	1,460	-	1,460	2,736
Presentations and events	-	-	-	229
Other fundraising costs	7,660	1,149	8,809	438
	<hr/>	<hr/>	<hr/>	<hr/>
Total	55,881	1,149	57,030	34,538
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

7a Expenditure on charitable activities

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Africa Conservation Programmes	23,377	-	23,377	17,794
Education – Roots & Shoots	43,850	132,471	176,321	171,053
	<u>67,227</u>	<u>132,471</u>	<u>199,698</u>	<u>188,847</u>

7b Expenditure on charitable activities - Africa Conservation Programme

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Grant funding of activities	17,248	-	17,248	12,947
Support cost allocation	6,129	-	6,129	4,847
	<u>23,377</u>	<u>-</u>	<u>23,377</u>	<u>17,794</u>

7c Expenditure on charitable activities – Education - Roots & Shoots Programme

	Unrestricted funds £	Restricted funds £	2020 £	2019 £
Direct staff costs	-	90,050	90,050	87,502
Activities undertaken directly	2,286	6,515	8,801	5,546
Grant funding of activities	-	6,733	6,733	42,459
Support cost allocation	41,564	-	41,564	18,384
Professional fees	-	29,173	29,173	17,162
	<u>43,850</u>	<u>132,471</u>	<u>176,321</u>	<u>171,053</u>

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

8 Net income for the year

	2020 £	2019 £
This is stated after charging:		
Independent examiner's fee	3,360	3,090
Depreciation	874	-

9 Staff costs

	2020 £	2019 £
Wages and salaries	106,559	106,830
National insurance costs	7,063	8,357
Pension costs	4,049	3,178
Total	117,671	118,365

There are zero (2019: zero) employees with emoluments of over £60,000.

The average number of employees during the year was 3 (2019 - 3).

Full time Equivalent Employees

	2020	2019
Full time Employees	2.0	2.0
Part-time Employees	0.8	0.8
Total FTE Employees	2.8	2.8

Excluded from the above are contractor payments of £18,405 which are included in charitable activities and raising funds.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020 (*continued*)

10 Trustee remuneration and expenses

The trustees consider those employees or contractors in charge of directing and controlling the charity, running and operating the charity on a day-to-day basis and reporting to trustees as comprising the key management personnel of the charity.

The total amount of employee benefits received by key management personnel in 2020 was £64,598 (in 2019 the board considered that key management personnel consisted of trustees only).

None of the Trustees, nor any persons connected with them, received any remuneration during the year (2019 - £Nil).

The charity insurance policy for 2020 included Trustee Indemnity Insurance. The cost of the trustee Indemnity Insurance element of the policy is not separately identifiable.

11 Taxation

The charity is exempt from direct tax on its charitable activities.

12 Tangible fixed assets

	Office equipment £	Computer equipment £	Total £
<i>Cost</i>			
At 1 January 2020	1,223	26,705	27,928
Additions	330	3,934	4,264
Eliminated on disposal	(1,223)	(26,705)	(27,928)
At 31 st December 2020	<u>330</u>	<u>3,934</u>	<u>4,264</u>
<i>Depreciation</i>			
At 1 January 2020	1,223	26,705	27,928
Provided during year	6	868	874
Eliminated on disposal	(1,223)	(26,705)	(27,928)
At 31 December 2020	<u>6</u>	<u>868</u>	<u>874</u>
<i>Net book value</i>			
At 1 January 2020	-	-	-
At 31 December 2020	<u>324</u>	<u>3,066</u>	<u>3,390</u>

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

13 Stock	2020	2019
	£	£
Books	3,855	3,122
Merchandise	4,174	3,760
	<hr/>	<hr/>
Total	8,029	6,882
	<hr/>	<hr/>
14 Debtors	2020	2019
	£	£
Other debtors	7,843	4,939
Prepayments	5,334	2,001
	<hr/>	<hr/>
Total	13,177	6,940
	<hr/>	<hr/>
15 Creditors: amounts falling due within one year	2020	2019
	£	£
Trade creditors	8,664	-
Trustee loan	10,130	10,130
Accruals	8,711	10,826
Taxation and social security	2,710	3,014
Pension creditor	1,582	1,218
	<hr/>	<hr/>
Total	31,797	25,188
	<hr/>	<hr/>

The Jane Goodall Institute (UK)

Notes forming part of the financial statements for the year ended 31 December 2020 (*continued*)

16 Restricted funds	Balance at 01/01/2020 £	Income £	Expenditure £	Transfer £	Balance at 31/12/2020 £
Gombe Housing project	1,450	-	-	(1,450)	-
Roots & Shoots programme	6,404	104,179	(133,620)	23,037	-
Congo	-	8,117	-	-	8,117
Senegal	-	5,000	-	-	5,000
Total	7,854	117,296	(133,620)	21,587	13,117

Restricted funds - previous year	Balance at 01/01/2019 £	Income £	Expenditure £	Balance at 31/12/2019 £
Gombe Housing project	1,450	-	-	1,450
Roots & Shoots programme	-	160,295	(153,891)	6,404
Total	1,450	160,295	(153,891)	7,854

Gombe Housing project provided accommodation at the Gombe Stream Research Centre, Tanzania for the researchers, conservationists and staff at the National Park where Jane Goodall started her revolutionary studies of chimpanzees. The donor agreed that the surplus in the Gombe Housing project fund could be transferred to the unrestricted to cover administrative expenses.

Funds for Roots & Shoots are spent on the education programmes delivered by the Institute in the UK and UAE to encourage young people to implement practical positive change for people, animals and the environment. Insufficient restricted funds were available in 2020 in relation to the direct costs incurred by and the support costs allocated to the Roots and Shoots programme and funds have therefore been transferred from unrestricted funds to cover this.

Funds restricted for Tchimpounga, Congo are for the care, rehabilitation and non-invasive research of rescued chimpanzees at the sanctuary in Africa, run by the *Jane Goodall Institute, Republic of Congo*. In 2020 a review of the funds of the Charity was undertaken and this fund was re-assigned from designated funds to restricted funds (see note 16).

Funds restricted for Senegal are to support the protection of the critically endangered western chimpanzee - some groups of chimpanzees in this country feature many unique behavioural patterns developed to adapt themselves to this hot & dry habitat, such as getting into water pools, using caves to avoid the heat and spear-hunting of some smaller primates. The funds will be used by our sister charity *Instituto Jane Goodall* (the Jane Goodall Institute, Spain), which has developed a partnership with local communities in Senegal to support research and conservation programmes, agroforestry, food security, environmental education and ecotourism.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

17 Unrestricted funds	Balance at 01/01/2020 £	Income £	Expenditure £	Transfer £	Balance at 31/12/2020 £
Unrestricted Funds	153,201	199,158	(123,108)	(21,587)	207,664
Total	153,201	199,158	(123,108)	(21,587)	207,664
Unrestricted funds – previous year					
	Balance at 01/01/2019 £	Income £	Expenditure £		Balance at 31/12/2019 £
Designated Funds: Tchimpounga, Congo (including Chimpanzee Guardianship monies)	3,852	-	(3,852)		-
Unrestricted Funds	107,346	111,496	(65,641)		153,201
Total	111,198	111,496	(69,493)		153,201
18 Analysis of net assets between funds					
		Unrestricted funds £	Restricted funds £		Total 2020 funds £
Fixed Assets		3,390	-		3,390
Cash at bank		215,998	11,984		227,982
Other current assets		20,073	1,133		21,206
Creditors falling due within one year		(31,797)	-		(31,797)
Total net assets at 31 December 2020		207,664	13,117		220,781

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

18 Analysis of net assets between funds (continued)

Analysis of net assets between funds – previous year

	Unrestricted funds £	Restricted funds £	Total funds £
Cash at bank	164,566	7,854	172,420
Other current assets	13,822	-	13,822
Creditors falling due within one year	(25,188)	-	(25,188)
	<hr/>	<hr/>	<hr/>
Total net assets at 31 December 2019	153,201	7,854	161,055
	<hr/>	<hr/>	<hr/>

19 Financial commitments

As at 31 December 2020, the charity had total annual commitments under non-cancellable property leases as set out below:

	2020 £	2019 £
Not later than one year	5,556	5,195
Within two to five years	9,512	15,584
	<hr/>	<hr/>
	15,068	20,779
	<hr/>	<hr/>

20 Related party transactions

There were no transactions with related parties during the year.

The Trustee loan, included within Creditors: amounts falling due within one year, is unsecured, interest free and repayable by agreement between The Jane Goodall Institute (UK) and the Trustee.

The Jane Goodall Institute (UK)

Notes forming part of the financial statements
for the year ended 31 December 2020 (*continued*)

21 Prior Year Statement of Financial Activities

	Unrestricted funds £	Restricted funds £	Total 2019 £	Total 2018 £
Income from:				
Donations and legacies	95,023	160,295	255,318	141,310
Other trading activities	16,279	-	16,279	144,903
Investments	194	-	194	35
	<hr/>	<hr/>	<hr/>	<hr/>
Total income	111,496	160,295	271,791	286,248
	<hr/>	<hr/>	<hr/>	<hr/>
Expenditure on:				
Raising funds	34,538	-	34,538	53,585
Charitable activities	34,955	153,891	188,846	201,693
	<hr/>	<hr/>	<hr/>	<hr/>
Total expenditure	69,493	153,891	223,384	255,278
	<hr/>	<hr/>	<hr/>	<hr/>
Net income and net movement in funds for the year	42,003	6,404	48,407	30,970
	<hr/>	<hr/>	<hr/>	<hr/>
Reconciliation of funds				
Total funds brought forward	111,198	1,450	112,648	81,678
	<hr/>	<hr/>	<hr/>	<hr/>
Total funds carried forward	153,201	7,854	161,055	112,648
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>