



Jane Goodall Institute
UK

Annual Report and Financial Statements

Year Ended 31 December 2022

Charity Number 327858

**The Jane Goodall Institute (UK)
Report and financial statements
for the year ended 31 December 2022**

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The Jane Goodall Institute (UK)
Reference and administrative information
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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		
Mary Lewis - Dr. Goodall's representative - Chair		
Dr Roger Wood	25 April 2022	
Rosemary Reed	24 March 2023	

Chief Executive Officer

Corinna McShane, MSc, FRGS, FRSA

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

Price Bailey Chartered Accountants, 8th Floor Dashwood House, 69 Old Broad Street, London, EC2M 1QS

The Jane Goodall Institute (UK)
Trustees' annual report
for the year ended 31 December 2022

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 2022.

STRUCTURE, GOVERNANCE AND MANAGEMENT

Constitution and Governance

The Institute is a registered charity in England and Wales (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 power of appointing new and additional Trustees is vested in the continuing Trustees.

The Institute is one of a network of international Jane Goodall Institutes ("JGIs") in 25 countries throughout Africa, the Americas, Asia and Europe - separate organisations working together to advance Dr Goodall's vision of a better future for people, other animals and the planet we share.

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 leadership of the charity delegated to the Chief Executive Officer (CEO), Corinna McShane. The CEO leads the development and implementation of the Institute's long/medium-term strategy and annual business plans in accordance with the strategic direction and policy framework agreed by the Trustees.

Trustee induction, training, and remuneration

On recruitment new Trustees hold calls or meetings with key individuals in the organization and are directed towards the applicable Charity Commission guidance on their legal role and responsibilities. The trustees recognize the current need for additional trustees and plan to recruit new Trustees in line with identified skills needs (a new Trustee was appointed in early 2023 to support with income generation). All Trustees give their time freely and no Trustee remuneration was paid in the year.

Risks and mitigations

Trustees have considered the major risks faced by the Charity and have examined key controls over financial and operational systems and other business risks which the Charity faces and confirm that systems are in place to mitigate the significant risks. The Trustees have identified income generation as being the principal risk facing the charity, compounded by the current UK cost of living crisis. The trustees aim to mitigate this risk through the continued roll out of the 2022-2024 Strategic Roadmap which focuses on further strengthening the Institute's internal foundations; increasing income diversity; partnering with organisations who share the Charity's commitment to conservation and sustainability and by developing initiatives to raise awareness of the charity and its impact to new potential supporters and donors.

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 and as agreed within the 2022-2024 Strategic Roadmap, which aims to take the charity on a new journey of growth and to increase focus/support for JGI projects in Africa.

The purpose of the Institute as specified in the Trust Deed is: *"The advancement of education for the public benefit of supporting study of and 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 grants made to other Jane Goodall Institutes in Africa, in particular to:

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- support **community conservation** projects delivered by other JGIs in Africa that protect wild chimpanzees and include the needs of local people and the environment – an approach we call ‘Tacare’.
- support **JGI sanctuaries for orphan chimpanzees** illegally taken from the wild - Chimp Eden in South Africa and the Tchimpounga Chimpanzee Rehabilitation Centre in the Republic of Congo
- develop and empower **compassionate young change makers of all ages** in the UK and UAE through our free environmental and humanitarian programme, “Jane Goodall’s Roots & Shoots”
- **raise awareness in the UK** of issues such as wildlife trafficking and tackling the irresponsible portrayals of chimpanzees on social media
- **share news in the UK about the chimpanzee families and on-going JGI scientific research into wild chimps in Gombe National Park, Tanzania.** This work was started by Dr Jane Goodall, DBE in 1960 and continues to this day as the longest running wild chimpanzee study in the world.

Dr Jane Goodall, DBE and UN Messenger of Peace

We remain honoured that Dr Jane Goodall continues to be a member of the Board of Trustees since the charity was founded in 1988. Dr Goodall is a world-renowned ethologist and conservationist inspiring greater understanding and action on behalf of the natural world.

Dr Goodall is known for her ground-breaking studies of wild chimpanzees in Gombe Stream National Park, Tanzania, which forever changed our understanding of our relationship to the rest of the animal kingdom. Dr Goodall’s work builds on scientific innovations, growing a lifetime of advocacy including trailblazing efforts through the Jane Goodall Institute which has Institutes in 25 countries advancing community-led conservation, animal welfare, conservation science, and youth empowerment. Dr Goodall is growing the next generation of compassionate changemakers through the “Jane Goodall’s Roots & Shoots” environmental and humanitarian youth programme, now active in over 65 countries.

In 2021 Dr Goodall was the recipient of the prestigious *Templeton Prize* which honours individuals whose exemplary achievements harness the power of the sciences to explore the deepest questions of the universe and humankind’s place and purpose within it. Due to pandemic restrictions, the presentation of the prize by the US based The John Templeton Foundation took place this year and the Institute was pleased to support delivery of the award event at the Natural History Museum in May 2022.

In 2022 Dr Goodall was humbled to be awarded the *Stephen Hawking Medal for Science Communication* at the sixth Starmus Festival, presented in London in November 2022. Dr Goodall was also thrilled to be named 'Queen of the Jungle' by the *Oldie of the Year Awards* celebrating the best of the older generation.

During the year, two product partnerships developed by our sister organisation, the Jane Goodall Institute USA, were available to purchase worldwide including within the UK. Dr Goodall was honoured to be portrayed as a Barbie doll, the first in their Inspiring Women Series to be made from recycled materials. Dr Goodall was also delighted to be portrayed as a Lego figure person released on International Women’s Day in 2022 - the first Lego tribute collector’s set to feature a living featuring several elements made from plant-based plastic, produced using sustainably sourced sugarcane.

ACHIEVEMENTS AND PERFORMANCE

KEY ACHIEVEMENTS

With the arrival of our new CEO in May 2021, as detailed in last year's "Plans for Future Periods" work has continued internally during 2022 to streamline existing/establish new internal processes and to take the charity on a new journey of growth. As such during the year we embarked on a range of exciting new initiatives (all proudly developed and designed in house) that effectively relaunched the charity. Further detailed is provided throughout this report but in summary:

- Our stunning **new website** was launched (with the same web address), full of colourful updates and videos about and information about our work in the UK and Africa and information about Dr Goodall. The site also has an in-built accessibility tool with a range of features for those who have sight impairment, dyslexia, epilepsy and ADHD. www.janegoodall.org.uk
- We launched a **new brand** (featured on the cover of this report) which reflects the interconnectedness of animals, people and the environment. We also delivered a powerful new tagline - "*Inspiring Hope Through Action*".
- Our **Chimp Guardian programme** which offers symbolic adoptions of rescued chimpanzees at the JGI Tchimpounga sanctuary, was totally revamped including new branding, new chimpanzees and an enhanced range of benefits digitally delivered to reduce our impact on the environment.
- We were thrilled to announce an increased focus on supporting **community conservation projects in Africa** run by sister Jane Goodall Institutes, enabling us to tackle conservation challenges from a number of different angles.
- We developed a new **digital supporter e-newsletter**, Hope Times packed with news about how donor support is making an impact in the UK and Africa, together with news about Dr Goodall and our core programmes.
- We also launched a new **sustainable clothing and bag range** for men, women and children from organic cotton using renewable energy in a factory audited for a wide range of social and sustainability criteria. Each item is printed to order in the UK by Teemill. All items are GM/animal-derived products free, not tested on animals and sent in non-plastic packaging.

The charity's relaunch was celebrated at a sell-out event with Dr Goodall ('*An Evening of Hope*') at the prestigious Royal Geographical Society on November 30 2022.

In recent years, the priority focus for the Institute had been on delivering our environmental and humanitarian programme for young people, "**Jane Goodall's Roots & Shoots**" (Roots & Shoots) in the **UK** and the **UAE** and supporting the JGI Tchimpounga sanctuary through our Chimp Guardian programme. The Institute now has an increased focus on supporting JGI projects in Africa and as detailed on following pages we are thrilled to be helping animals, people and the environment in many different ways - from protecting wild chimpanzees in **Senegal**, supporting girls to stay on at school in rural **Uganda**, supporting JGI sanctuaries for rescued chimps in South Africa and the **Republic of Congo** and through the DP World funding, developing Roots & Shoots across Africa and around the world.

The team at the Institute is small in comparison to many other UK conservation/environmental charities (with just 4.8 FTE in post during 2022) but it punches above its weight in terms of the scope and impact of its activities. All members of the team are home based primarily in London, with a small administration office run by our Office Administrator in Lympington, Hampshire. Staff salaries are set in line with wider sector knowledge and experience.

The Board would like to thank our staff team for their continued dedication to the charity and our Chimp Guardians, donors and supporters for their on-going support which is greatly appreciated.

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FUNDRAISING

The Institute does not receive any government income and relies on the kind generosity of individuals and companies to fund its work. The Institute's staff team seek support from individuals, companies and charitable trusts whenever possible, as it is without any full-time fundraising team resource. As detailed on page 4 the Trustees have identified income generation as being the principal risk facing the charity, compounded by the current UK cost of living crisis

The charity understands its duty to protect the public, including vulnerable people, from unreasonably intrusive or persistent fundraising approaches and undue pressure to donate. During the year the charity did not receive any complaints in relation to its fundraising practices. (In early 2023, the Institute was proud to register with the 'Fundraising Regulator', the independent regulator of charitable fundraising. Being registered means we are committed to its Fundraising Promise which outlines our commitment to donors and the public).

Our new website significantly streamlined online donation and Gift Aid procedures, improving the donor journey and reducing internal processing time. A temporary Fundraising Assistant was employed for a three-month period to deliver a substantial redevelopment of our supporter database and to support the delivery of our new sustainable clothing range. During the year the charity received income from a range of sources:

- **Legacies:** as always, we remain hugely grateful to all those who so kindly remember the Institute in their wills. In 2022 we were touched to have been left a legacy donation by Thomas Hugh Bickerton totalling 5,000 Euros, which we received with very grateful thanks.
- **Events:** during our 'Evening of Hope' on November 30 at the Royal Geographical Society, attendees heard about our work from our CEO and were enthralled by stories from Dr Goodall about her childhood, Gombe and her reasons for hope. We are so grateful to everyone who bought a ticket to attend and generously bid on our auction items. Huge thanks to our wonderful host Peter Egan; our fabulous auctioneer Dan Hatfield; our special guest Ellie Goulding and to Fearn Cotton and Sophie Green for donating their beautiful paintings for our auction, which together with other items raised an incredible £53,250 for our charity!
- **Speaker donations:** the Institute is hugely grateful to Board Member Dr Goodall DBE, for undertaking several online events and talks with UK and UAE based organisations during the year that generate an incredible £253,941 (2021 – £62,814) in donations to the charity.
- **Merchandise:** as planned, during the year we sourced a new sustainable supplier (Teemill) to produce a range of tops and tote bags (using unique JGI designs) from organic cotton using renewable energy in a factory audited by them for a wide range of social and sustainability criteria. Each item is printed to order in the UK. All items are GM/animal-derived products free, not tested on animals and sent in non-plastic packaging.
- **Chimp Guardian:** For many years the Institute has encouraged its supporters to become Chimpanzee Guardians to support the work of the JGI Tchimpounga Chimpanzee Rehabilitation Centre in the Republic of Congo (see page 10) and this remains a priority for the charity. We are very proud to have re-launched the programme in 2022, featuring several new chimpanzees (including the world-famous rescued chimpanzee, Wounda) and an enhanced range of benefits digitally delivered to reduce our impact on the environment. 80% of Chimp Guardian income is donated to Tchimpounga to contribute towards providing food, medicine, enrichment and care for chimps at the centre and 20% contributes towards our costs in running and promoting the programme in the UK. In January 2023, the Institute donated £4,000 to Tchimpounga from Chimp Guardian income raised in 2022. Much activity was also undertaken throughout the year to raise awareness of the sanctuary's work to Chimp Guardians, supporters and the public.

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- **Membership:** as detailed in last year's annual report, the efficacy of operating a Membership scheme was reviewed and we made the difficult decision to close our Membership scheme in 2022. We are so grateful to all Members that have kindly supported the Institute over many years but sadly it is no longer cost effective to continue this scheme. We are very grateful to those Members that have continued to support the Institute as either donors or Chimp Guardians.
- **London marathon:** we were thrilled to have our first London Marathon charity place for some years and we were delighted that this was used by DP World employee Neil Blow who raised a fantastic £2,186 for our work.
- **Jane Goodall's Roots & Shoots:** the Board is extremely grateful to DP World; Montessori; National Geographic Kids; St George's House Windsor Castle; Stewart McPherson, RSPCA, Earthwatch, Besureis, Hanworth and the Don Hanson Charitable Foundation for their continued support of Roots & Shoots in the UK and the UAE.
- **Corporate donations:** during the year it was a pleasure to work with some new corporate partners who very generously donated towards our work, including *Lego* and *Stella McCartney Beauty*.
- **DP World:** In September 2021, we were delighted to announce an exciting three-year partnership with DP World, focusing on supporting the growth of "Jane Goodall's Roots & Shoots" in the UAE/around the world and aiding the development of the Institute in the UK.
 - DP World are a global port, logistics, trade organisation headquartered in Dubai, with over 50,000 staff in 55 countries. DP World are committed to conservation and sustainability and have long term partnerships with a range of leading organisations including Tusk Trust, ZSL and United for Wildlife.
 - As detailed in the Accounts, a second-year funding payment of £250,000 was received from DP World during 2022 (£125,000 of this income is restricted). The Institute is very proud to have developed an Agreement with DP World that shares this income with other JGIs around the world - as such from the second-year funding payment, £25,000 was restricted to Roots & Shoots projects in Africa (as detailed on page 11) and another £25,000 restricted to Roots & Shoots projects around the world (excluding the UAE and Africa), as detailed on page 14.
 - As shown on pages 31 and 32, this £50,000 expenditure was donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit, to distribute to Roots & Shoots projects around the globe. As per our Agreement with DP World, a further £18,750 was donated to the Jane Goodall Institute Global to cover the resource costs of managing the Roots & Shoots international growth programme.
 - The Board is very grateful for DP World's very generous support.

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SUPPORTED PROGRAMMES

As detailed on page 5, the Institute supports the delivery of a range of programmes delivered directly and indirectly via grants to other Jane Goodall Institutes in Africa, to benefit people, animals and the environment in the UK, Africa and around the world as follows:

SUPPORTING COMMUNITY CONSERVATION AND JGI SANCTUARIES FOR ORPHAN CHIMPANZEES IN AFRICA

In recent years, the priority focus for the Institute had been on delivering our environmental and humanitarian programme for young people, “*Jane Goodall’s Roots & Shoots*” in the UK and the UAE and supporting the JGI Tchimpounga sanctuary through our Chimp Guardian programme. Other JGI projects in Africa were also supported financially when possible, on an ad-hoc basis.

The Institute’s new CEO joined in May 2021 with a remit from Dr Goodall and the Board to take the charity on a new journey of growth and to increase focus and support for JGI projects in Africa. As such as detailed in last year’s report, Senegal and the Chimp Eden Sanctuary in South Africa were identified by the Board of Trustees as priority support areas to support in 2021 and beyond. In July 2022, the Institute expanded its support to also include supporting a long-standing JGI project focused on supporting girls to stay on at school in rural Uganda. Throughout the year the Institute has shared news of the projects it supports in Senegal, South Africa and Uganda with supporters via social media and its Hope Times newsletter.

During 2022, the Institute was proud to support the following programmes and activity in Africa, totaling £80,854 (2021, £89,892) in financial support (in addition as detailed on page 11, a further £25,000 from DP World funding in 2022 supported the development of Roots & Shoots across Africa and in January 2023 the Institute donated £4,000 from funds raised via its Chimp Guardian programme in 2022):

Senegal: *helping to protect the Critically Endangered Western chimpanzee in Senegal and reversing deforestation through community led initiatives.*

- Our sister organisation ‘*Instituto Jane Goodall*’ (the Jane Goodall Institute Spain) operates with a local field team in the Kédougou region of south eastern Senegal and across the border, in northern Guinea using the Tacare community conservation approach developed by Dr Jane Goodall. Using cutting-edge technology and experienced Senegalese field assistants, the team based at the Dindéfélo Biological Station non-invasively monitor the local chimpanzee population and their habitat in the Dindéfélo Community Nature Reserve.
- The collected data not only contributes to the scientific knowledge of the ecology, behaviour and culture of the Western chimpanzee but also helps guide the team and local authorities with their conservation planning to protect these primates and their habitat, and to mitigate negative interactions between humans and chimpanzees.
- We are delighted that our funding in 2022 helped support the expansion of this very valuable work into two new areas adjacent to Dindéfélo - Dakateli and Fongolimbi. £25,412 (2021, £34,390) was donated to the Jane Goodall Institute Spain to support Senegal in 2022.

South Africa: *supporting the JGI Chimp Eden sanctuary for rescued chimps*

- Chimp Eden, run by the *Jane Goodall Institute South Africa* provides a safe haven for rescued chimps from across Africa. Whilst South Africa is not in the chimpanzee range, this special sanctuary established in 2006 is home to chimpanzees rescued from across the continent who have survived the bush meat trade, been orphaned, sold in illegal pet markets, or used as entertainment in circuses, beach resorts and night clubs.
- Before the pandemic Chimp Eden's visitor income covered much of their operational expenses but in 2022 tourist numbers were still severely below pre-Covid levels so the sanctuary was in urgent need of financial support.
- We were very proud to provide much needed funding - £37,287 (2021, £33,890) was donated to the Jane Goodall Institute South Africa for Chimp Eden in 2022.

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Republic of Congo: *the JGI Tchimpounga Chimpanzee Rehabilitation Centre*

- For many years the Institute has proudly supported the Tchimpounga Chimpanzee Rehabilitation Centre run by *the Jane Goodall Institute, Republic of Congo*, via our Chimp Guardian programme which offers symbolic adoptions of four rescued chimps. As detailed on page 7, we are very proud to have re-launched the programme in 2022 to include new chimps and an enhanced range of benefits digitally delivered to reduce our impact on the environment.
- Often orphaned by the international commercial bushmeat and pet trades, these chimpanzees receive expert care and rehabilitation by Tchimpounga's staff and are integrated into new chimpanzee families.
- Tchimpounga is surrounded by 129,000 acres of dense rainforest and savannah. Founded in 1992 it is one of the largest chimpanzee sanctuaries in Africa having provided care to more than 200 individuals since it opened. Chimpanzees are cared for at a main sanctuary site, as well as three forested islands (Tchibebe, Tchindzoulou, and Ngombe) chosen for the natural protection they provide. The undisturbed forests of the islands provide a wealth of food and habitat to support healthy, secure living in a near-wild environment for the chimpanzees who are released there.
- No two chimpanzee stories at Tchimpounga are the same. Staff carefully assess and monitor the health of each individual, while also learning their patterns of behaviour and personality. Individual care plans are developed for each chimpanzee while supporting and ensuring their welfare as they are integrated into communities of other chimps, most of whom are unrelated to one another.
- 80% of Chimp Guardian income is donated to Tchimpounga to contribute towards providing food, medicine, enrichment and care for chimps at the centre and 20% of contribute towards our costs in running and promoting the programme in the UK. In January 2023 (therefore not included within the £80,854 donated to Africa programmes by the Institute in 2022) the Institute donated £4,000 from funds raised via its Chimp Guardian programme in 2022 (2021, £11,915, of which £8,117 related to 2020) to Tchimpounga (via JGI USA which handles income generation for the sanctuary).
- and raised awareness of the sanctuary's work to Chimp Guardians, supporters and the public throughout the year.

Uganda: *reducing school drop-out rates for girls in rural areas*

- In places like Uganda, girls that stay on a school and enter work, are less likely to marry young and more likely to have fewer children. Local economies are boosted, pressure on natural resources is reduced. The outlook for everyone - communities, habitats and wildlife is improved.
- However, in 2019 Uganda's Ministry of Education stated that nearly 25% of girls between the ages of 12 and 18 drop out of school once they begin menstruating.
- In 2022 we were so pleased to be able to start contributing towards *the Jane Goodall Institute Uganda's* long running project aimed at increasing school completion rates through the provision of underwear, sanitary pads and school supplies. A key part of the programme involves making reusable sanitary pads via in school training workshops held for pupils. In addition to learning how to make and use reusable pads, advice is also given on menstrual hygiene and reproductive health. After the workshop, participants are given books, geometric sets and pens to help support their studies.
- In 2023 boys are now also being integrated into these activities in order to reduce the stigmatisation of girls during their period and to teach them how to support their sisters, friends, and classmates.
- \$5,000 (£4,199) was donated to the Jane Goodall Institute Uganda (via JGI USA which handles income generation for the JGI Uganda office) to support this programme in 2022.

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SUPPORTING THE GROWTH OF “JANE GOODALL’S ROOTS & SHOOTS” IN AFRICA

- “Jane Goodall’s Roots & Shoots” is a worldwide movement across more than 65 countries empowering young people of all ages to deliver meaningful positive impact in their local communities to help make the world a better place for all – animals, people and the environment. In 2021, the Roots & Shoots programme had more than 10,000 groups around the world involving more than one million people.
- As detailed on page 8 in 2021, the Institute announced an exciting three-year partnership with DP World, focusing on supporting the growth of Roots & Shoots in the UAE/around the world and aiding the development of the Institute in the UK. The Institute is very proud to have developed an agreement with DP World that shares this income with other JGIs around the world - £25,000 from each year of the three-year funding will be allocated to Roots & Shoots projects in Africa (another £25,000 is restricted to Roots & Shoots projects around the world excluding the UAE and Africa). As per our Agreement with DP World, these funds are donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit, to distribute to Roots & Shoots projects in Africa.
- The £25,000 donated to the Jane Goodall Institute Global for 2021 detailed in last year’s Annual Report was also distributed in 2022. As such a total of £50,000 was available for allocation to Roots & Shoots projects in Africa in 2022 via a formal application process (managed by the Jane Goodall Institute Global, with input from JGI UK) open to all countries with a JGI/Roots & Shoots presence in Africa. After a rigorous selection process, we are delighted that each of the following countries were given a \$5.5k grant in 2022:
 - **Democratic Republic of Congo (2021 funding):** this grant supported the coordination and growth of Roots & Shoots in Eastern DRC. Volunteer coordinators were recruited and 12 Roots & Shoots clubs were launched in Goma and Butembo, engaging 600 young people. In addition, 700 trees were distributed in local communities.
 - **South Africa (2021 funding):** this grant enabled the expansion of Roots & Shoots to three new vulnerable communities within the Mpumalanga province, engaging 236 children, 83 parents, plus an additional 52 community members. The funding also assisted the creation of three hectares of food gardens and supported the establishment of two new community libraries within the Ngodini and Elandshoek communities.
 - **Rwanda (2022 funding):** this grant will be used to support Roots & Shoots groups at 10 schools located in two provinces, including environmental education activities and events outside of the classroom such as small field trips, community service projects and environmental awareness campaigns. Funds will also be used to implement hands-on projects, including a tree plantation project.
 - **Senegal (2022 funding):** this grant aims to engage with young people living in challenging circumstances where impoverished communities are affected by climate change and not all children are able to attend school. These funds will be used over a seven-month period to support three part-time Roots & Shoot leaders who will carry out projects, train local leaders in rural communes and supervise activities each month in different villages in the biodiverse Kedougou region. The project aims to carry out regular environmental education activities for over 300 children/young people in three communes, regarding the understanding, appreciation and protection of the environment and all living beings.
- In addition, income from the above £50,000 also funded the creation of **two new part time Roots & Shoots Coordinator roles** based in the Democratic Republic of Congo and in Tanzania. These very impactful new posts will support the growth of Roots & Shoots across Africa. The development of the programme in new countries such as Egypt, Zimbabwe, Malawi has started in earnest with the new coordinators engaging with new contacts in these locations.

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DEVELOPING COMPASSIONATE YOUNG CHANGE MAKERS IN THE UK AND UAE THROUGH OUR FREE ENVIRONMENTAL AND HUMANITARIAN PROGRAMME, "JANE GOODALL'S ROOTS & SHOOTS"

Jane Goodall's Roots & Shoots (Roots & Shoots) is a worldwide movement across more than 65 countries empowering young people to deliver meaningful positive impact in their local communities. In 2021, the Roots & Shoots programme had more than 10,000 groups around the world involving more than one million people.

Roots & Shoots is one of the Institute's core programmes which we directly deliver in the UK and the UAE.

The programme empowers young people of all ages (and an increasing number of adults) to become involved in hands on projects to benefit their local community, animals (including domestic animals) and the environment, leading them to become better, more informed global citizens.

During the year the Roots & Shoots team in the UK was restructured with a view to increasing staff resources to help the programme grow. Jasmina Georgovska (previous Executive Assistant for the Roots & Shoots Executive Director) was promoted to Schools Liaison Officer and Claire Quarendon's role as Office Administrator for the Jane Goodall Institute UK was amended to include administrative support for Roots & Shoots. Alongside this, investment into increased marketing and promotion took place, including the development of a colourful new guide to Roots & Shoots which was issued electronically to potential new schools in the UK in November. It is very pleasing to see that this publication has been successful in encouraging new school sign-ups in 2023.

By the end of 2022, 1515 schools and colleges were registered members of Roots & Shoots in the UK, with a further 150 school members in the UAE.

Through participation in group activities at schools, colleges, universities and in the wider community, the programme also helps young people develop transferable skills including relationship building, teamwork, leadership, communication, planning and lifeskills such as respect, confidence and compassion. As a result, young people are more aware, better informed and more proactive in their influence on their environment through involvement with the programme.

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New resources

The “Jane Goodall’s Roots & Shoots” programme provides a wide range of free resources that can be downloaded from our website and carried out either as individual or group activities within schools and other settings.

During 2022 the following resources were produced kindly sponsored by DP World as part of their support as detailed on page 8. In addition to producing these resources for our own Roots & Shoots programmes in the UK and the UAE, we were also delighted to translate them into seven other languages (Arabic, French, German, Hindi, Mandarin, Spanish, Swahili) for use by other Roots & Shoots groups around the world

- *Sustainable shipping*: students learn to research the impact of shipping and design a model ship of the future
- *A Tale of Two Ports*: focuses on the development and difference between Liverpool, one of the busiest in the UK and Jebel Ali, one of the largest ports in Dubai.
- *Warm seas, Cold seas, Ocean currents*: includes simple experiments explaining the basics of ocean currents and the conditions plant life needs to thrive and how this relates to water temperature. Students learn the impact this has on the diversity and location of marine life.
- *Ocean Life*: compares the northern North Atlantic and northern Indian Ocean, exploring their marine life and the effects of climate change on life in our oceans.
- *Aquaculture*: focuses on the environmental impact of aquaculture and ways that students can make a difference through healthier eating choices.
- *Commercial Fishing*: this resource examines the fishing industry and suggests choices that students can take to help steer it into more sustainable practices.

The Twinning Programme

A number of Roots & Shoots schools across the UK and UAE were selected to take part in the Twinning programme where schools share their projects, culture, ideas and resources with one another, across the Ocean. Special attention is paid to pairing respective schools to most effectively match their age, circumstances, projects and locations.

Roots & Shoots Partnerships

The Institute is grateful for the support of the following key long standing partners that support Roots & Shoots:

- Earthwatch offer fully funded expedition places to a selected number of Roots & Shoots teachers;
- National Geographic Kids provide prizes for the Roots & Shoots Annual Awards and feature articles about both Dr Jane Goodall and the programme in their popular magazine;
- RSPCA provide prizes for the Most Outstanding Group at our Roots & Shoots Annual Awards which normally involves a trip to Mallydams Wood or one of their centres in the UK;

Smaller partnerships have included Leicester Council who have assisted with getting local schools involved with Roots & Shoots; Andover Trees United who have brought together local government and community organisations for tree planting projects as well as celebrating the annual global Roots & Shoots Peace Day on September 21 (Dr. Goodall was appointed a UN Messenger of Peace by the late UN Secretary General Kofi Annan in 2002 and each year we honour the UN Day of Peace on 21st September); Beyond Cop 21 has provided a platform to give presentations at key events and host an exhibition stand; Liberty Arts Yorkshire/ STEM Theatre in a Box has produced an educational theatre box, featuring Dr Jane Goodall as the main character and hence promoting Roots & Shoots through theatre in local schools which has proved extremely popular and soon to be expanded to other boroughs.

The Jane Goodall Institute (UK)
Trustees' annual report
for the year ended 31 December 2022 (continued)

SUPPORTING THE GROWTH OF “JANE GOODALL’S ROOTS & SHOOTS” AROUND THE WORLD

- As detailed on page 8 in 2021, the Institute announced an exciting three-year partnership with DP World, focusing on supporting the growth of Roots & Shoots in the UAE/around the world and aiding the development of the Institute in the UK. The Institute is very proud to have developed an agreement with DP World that shares this income with other JGIs around the world - £25,000 from each year of the three-year funding will be allocated to Roots & Shoots projects around the world (excluding the UAE/Africa) and another £25,000 is restricted to Roots & Shoots projects in Africa). As per our Agreement with DP World, these funds are donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit, to distribute to Roots & Shoots projects in Africa.
- The £25,000 donated to the Jane Goodall Institute Global for 2021 detailed in last year’s Annual Report was also distributed in 2022. As such a total of £50,000 was available for allocation to Roots & Shoots projects around the world in 2022 via a formal application process (managed by the Jane Goodall Institute Global, with input from JGI UK) open to all countries with a JGI/Roots & Shoots presence around the world (excluding Africa and the UAE). After a rigorous selection process, we are delighted that each of the following countries were given a \$5.5k grant in 2022:
 - **Argentina (and Latin America)** – 2021 & 2022 grant
 - **Australia** - 2022 grant
 - **Chile** – 2021 grant
 - **China** – 2021 grant
 - **France** – 2022 grant
 - **Germany** – 2021 grant
 - **Italy** – 2022 grant
 - **Spain** – 2021 grant
 - **South Korea** – 2022 grant
 - **Turkey** – 2021 & 2022 grant

RAISING AWARENESS IN THE UK OF ISSUES SUCH WILDLIFE TRAFFICKING AND SHARING NEWS ABOUT ON-GOING JGI SCIENTIFIC RESEARCH INTO WILD CHIMPS IN GOMBE.

There are 25 Jane Goodall Institutes (JGIs) around the world working together to advance Dr Goodall’s vision of a better future for people, other animals and the planet we share. In 2019, JGIs around the world joined forces to launch our first global campaign – *Forever Wild*, aiming at tackling the irresponsible portrayals of chimpanzees on social media. During 2022, the Institute continued to raised awareness of this campaign via a dedicated new website page, updates in the Hope Times newsletter and social media posts. Each year the Institute also celebrates two very special days linked to Dr Goodall’s work and role as a UN Messenger of Peace – World Chimpanzee (July 14) and World Peace Day (September 21), with a particular focus on engaging & Shoots members in the UK and UAE.

Trophy hunting is an issue very close to the hearts of our supporters. According to WWF's Living Planet Report 2022, there has been a shocking 69% average decline in globally monitored populations of vertebrates (mammals, birds, amphibians, reptiles and fish) since 1970. Species most popular with British trophy hunters, such as lions, elephants and rhinos are among those experiencing some of the greatest declines. In November 2021, Dr Goodall addressed MPs and Lords at a 'Ban Trophy Hunting' event in Parliament in support of *The Hunting Trophies (Import Prohibition) Bill*, prohibiting the import of hunting trophies into Great Britain. In January 2022 Dr Goodall was interviewed by Channel 4 news regarding her support for the ban and throughout the year the Institute shared news of the Bill with its supporters. (We are delighted that the Bill put forward by MP Henry Smith, was approved by MPs on March 17th! The Bill has now moved to the House of Lords, where it will be debated, voted on and hopefully pass into law).

The Institute is also proud to share news throughout the year with supporters and the wider public about the chimpanzee families and on-going JGI scientific research into wild chimps in Gombe National Park, Tanzania. This work was started by Dr Goodall in 1960 and continues to this day as the longest running wild chimpanzee study in the world.

The Jane Goodall Institute (UK)
Trustees' annual report
for the year ended 31 December 2022 (continued)

PROFILE RAISING

Despite the Institute lacking dedicated marketing or communications staff (or agency support) its new CEO brought much expertise in this area, so a significant amount of progress was made in 2021. Reflecting the Board's acknowledgement that raising awareness and increasing engagement is one of the keys to growth, the organisation was delighted to use unrestricted funds from the DP World funding to recruit its first ever Marketing & Communications Officer in January 2022 – much progress has been made during the year to further develop our social media presence and increase our follower numbers.

The final quarter of 2021 was dominated in a very positive way by the launch of Dr Goodall's new book in October - *"The Book of Hope: A Survival Guide for Trying Times"*. The CEO worked very closely with the Office of the Founder and publishers to support delivery of the largest UK media campaign ever generated for any of Dr Goodall's many books. An immense amount of coverage was generated during this period, significantly helping to increase awareness of Dr Goodall and the charity in the UK. During 2022 this momentum was continued with a range of high-profile media activity involving Dr Goodall including:

- the focus of a multi-page feature in *The Lady*
- interviewed by *The Times*
- interviewed by Elizabeth Day for her popular podcast, *'How to Fail'*
- focus of an in-depth TV interview for *'Emma Barnett Meets'*
- the City of Women London project (supported by Emma Watson) renamed Regents Park tube station 'Jane Goodall' for International Women's Day
- interviewed on *Times Radio* by Mariella Frostrup
- the focus of a multi-page interview by Livia Firth in *Vogue Arabia*
- interviewed by Euronews for their *Ocean Calls* podcast
- featuring in Hillary Clinton and Chelsea Clinton's new TV docuseries *"Gusty"*
- the focus of a multi-page interview in *Resurgence & Ecologist*
- interviewed by *The Sunday Times*
- interviewed for the Boxing Day edition of the *World at One* programme on Radio 4

PLANS FOR FUTURE PERIODS - 2023

In line with the Institute's strategic roadmap for 2022-2024, activity will be based around the following main areas in 2023

Strengthening the foundations for increased growth

- Further streamlining of internal processes
- Continue to supporting the staff team with on-going training and development
- Securing experienced HR consultant support to update existing policies
- Recruiting new Trustees in line with identified skills needs
- Undertake a major review of the substantial archives held at the Institute's administration office in Lymington

Income Generation

- Supporting delivery of the final year of our flagship partnership with DP World
- If funding permits, recruit freelance fundraising resource to explore expanding the Institute's legacy service
- Support delivery of the Stella McCartney Beauty campaign featuring Dr Goodall launching in early 2023
- Continue to develop new corporate partnerships with organisations that share our values
- Continue to promote Chimp Guardianship
- Develop plans around Dr Goodall's 90th birthday in 2024
- Register with the 'Fundraising Regulator', the independent regulator of charitable fundraising.

Supporting community conservation and JGI sanctuaries for orphan chimpanzees in Africa

- Continue to supply financial grants (subject to income) for JGI community conservation projects supporting animals, people and the environment in Senegal, South Africa and Uganda
- Continuing to support the Tchimpounga Chimpanzee Sanctuary in the Republic of Congo through donating 80% of the Institute's Chimp Guardianship income.

Supporting the growth of Roots & Shoots in Africa

- Support the delivery of the final year of DP World grants to "Jane Goodall's Roots & Shoots" projects in Africa and the funding of the two part time Roots & Shoots Coordinator roles in the Democratic Republic of Congo and Tanzania (see pages 11 and 14).

The Jane Goodall Institute (UK)
Trustees' annual report
for the year ended 31 December 2022 (continued)

Delivering “Jane Goodall’s Roots & Shoots” in the UK and the UAE

- Seek feedback from Roots & Shoots UK school members via an in-depth survey to assess and improve our Roots & Shoots offering.
- Implement improvements to the UK programme where possible according to survey feedback.
- Continue to increase the number of Roots & Shoots groups in the UK
- Continue to implement projects funded by DP World, including the creation of new resources in the areas of sustainable shipping, ocean life and commercial fishing Illegal Wildlife Trafficking; Climate Change: Flooding and Drought.
- Delivering the annual Roots & Shoots awards events in both the UK and the UAE
- Increase Roots & Shoots awareness and engagement via social and other media
- Expanding the Twinning programme between the UK and UAE
- Explore opportunities for new partnerships and additional long-term funding of the programme in the UK and UAE
- Rebrand the programme in line with rebranding of the Institute which took place in 2022

Supporting the growth of “Jane Goodall’s Roots & Shoots” around the world

- Support the delivery of the final year of DP World grants to Roots & Shoots projects around the world (excluding the UAE and Africa), see page 14.

Raising awareness in the UK of issues such as wildlife trafficking and sharing news about the chimpanzee families and on-going JGI scientific research into wild chimps in Gombe.

- Continue to share news throughout the year with supporters and the wider public about research activities in Gombe
- Celebrate two very special days linked to Dr Goodall’s work and role as a UN Messenger of Peace – World Chimpanzee (July 14) and World Peace Day (September 21), with a particular focus on engaging our Roots & Shoots members in the UK and UAE.
- Supporting JGI global campaigns relating to animal welfare, conservation and environmental protection, such as Forever Wild.
- Join the Climate Coalition, the UK’s largest group of people dedicated to action against climate change.

Awareness Raising for Dr. Jane Goodall, DBE and the Jane Goodall Institute UK

- Recruit new high-profile Ambassadors for the Institute that share our values to help the charity engage with new audiences
- Develop and support delivery of media activity that increases awareness of Dr Goodall and the Jane Goodall Institute in the UK.
- Continue to deliver improvements made with social media activity
- Support the delivery and promotion of high-profile projects involving Dr Goodall such as the new CGI series 'Jane's Animal Adventures' launching in 2023.

FINANCIAL REVIEW

Once again, we have seen a pleasing uplift in our 2022 income compared to the previous year, with £762,378 versus £594,365 in 2021. This increase is largely due to the very successful relaunch event held at the Royal Geographical Society in November 2022; corporate income and donations generated from online events & talks undertaken by Dr Goodall with UK based organisations during the year. During the year, the Institute gratefully received the second-year funding income from DP World of £250,000 (2021, £250,000).

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. 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 £429,297 (2021 - £386,083) and other expenditure to £81,299 (2021 - £44,284).

Overall expenditure totalled £510,596 (2021 - £430,367), resulting in a surplus for the year of £251,782 (2021-£163,998 surplus), however a proportion relates to the residue of the funding income from DP World carried forward for spending in 2023.

The accumulated funds at 31 December 2022 amount to £636,561 (2021 - £384,779).

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 £612,689 (2021: £356,120). This represents 25 months of unrestricted expenditure at 2022 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 4 to 18 was approved by the trustees, as a body, and signed on their behalf by:

Mary Lewis

Mary Lewis (Oct 10, 2023, 10:11am)

Mary Lewis
Trustee

Date:

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 2022, which are set out on pages 20 to 29.

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 un and 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

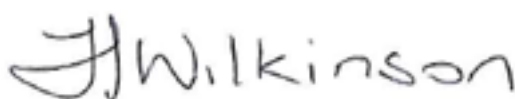
Since the Institute's gross income exceeded £250,000 your examiner must be a member of a body listed in section 145 of the 2011 Act. I confirm I am qualified to undertake the examination because I am a member of the Institute of Chartered Accountants in England and Wales, which is one of the list bodies. 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 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.

Helena Wilkinson FCA DChA

Date: 11 October 2023



Tennyson House
Cambridge Business Park
Cambridge
CB4 0WZ

The Jane Goodall Institute (UK)
Statement of Financial Activities
for the year ended 31 December 2022

	Notes	Unrestricted funds £	Restricted funds £	Total 2022 £	Unrestricted funds £	Restricted funds £	Total 2021 £
Income from:							
Donations and legacies	2	368,649	87,317	455,966	265,118	57,855	322,973
Charitable Activities	3	125,000	125,000	250,000	125,000	125,000	250,000
Other trading activities	4	55,524	-	55,524	20,867	500	21,367
Investments		888	-	888	25	-	25
Total income		550,061	212,317	762,378	411,010	183,355	594,365
Expenditure on:							
Raising funds	6	75,350	5,949	81,299	43,211	1,073	44,284
Charitable activities	7	218,142	211,155	429,297	219,343	166,740	386,083
Total expenditure		293,492	217,104	510,596	262,554	167,813	430,367
Net Income/(Expenditure)		256,569	(4,787)	251,782	148,456	15,542	163,998
Transfers between funds		-	-	-	-	-	-
Net movement in funds for the year		256,569	(4,787)	251,782	148,456	15,542	163,998
Reconciliation of funds							
Total funds brought forward		356,120	28,659	384,779	207,664	13,117	220,781
Total funds carried forward		612,689	23,872	636,561	356,120	28,659	384,779

The notes on pages 23 to 29 form part of these financial statements.

The Jane Goodall Institute (UK)
Balance sheet
at 31 December 2022

<i>Charity number 327858</i>	Note	2022 £	2022 £	2021 £	2021 £
Fixed assets					
Tangible assets	12		3,019		3,694
Current assets					
Stock	13	11,242		11,454	
Debtors	14	10,137		7,290	
Cash at bank and in hand		654,230		389,556	
		675,609		408,300	
Creditors: amounts falling due within one year	15	42,067		27,215	
Net current assets			633,542		381,085
Net assets			636,561		384,779
Funds					
Restricted funds	16		23,872		28,659
Unrestricted funds	17		612,689		356,120
Total funds carried forward			636,561		384,779

The financial statements on pages 20 to 29 were approved by the Trustees, as a body, and signed on their behalf by:

Mary Lewis

Mary Lewis (Oct 10, 2023, 10:11am)

Trustee

Date:

The notes on pages 23 to 29 form part of these financial statements.

The Jane Goodall Institute (UK)

Statement of Cash Flows

For the year ended 31 December 2022

	Notes	2022 (£)	2021 (£)
Cash flow from operating activities			
Net cash flow from operating activities (see below)		265,718	163,630
Cash flow from investing activities			
Dividends, interest and rents from investments		888	25
Purchase of tangible assets	12	(1,932)	(2,081)
Change in cash and cash equivalents in the year		264,674	161,574
Cash and cash equivalents brought forward		389,556	227,982
Cash and cash equivalents carried forward		654,230	389,556
		2022 (£)	2021 (£)
Reconciliation of net movement in funds to net cash flow from operating activities			
Net income for the year as per Statement of Financial Activities		251,781	163,998
Adjustment for:			
Depreciation charges	12	2,608	1,777
Dividends, interest and rents from investments		(888)	(25)
(Increase)/decrease in stock	13	212	(3,425)
(Increase)/decrease in debtors	14	(2,847)	5,887
Increase/(decrease) in creditors	15	14,852	(4,582)
Net cash used in operating activities		265,718	163,630
Analysis of changes in net debt			
	At 1 Jan 2022	Cashflows	At 31 Dec 2022
Cash and cash equivalents			
Cash	389,556	264,674	654,230
Borrowings			
Debt due within one year	(10,130)	-	(10,130)
Total	379,426	264,674	644,100

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022

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 reporting currency of the charity is £ and the accounts have been rounded to the nearest whole £.

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 financial statements have been prepared to give us a “true and fair” view and have departed from the Charities (Accounts and Reports) Regulations 2008 only to the extent required to provide a “true and fair view”. This departure has involved following 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) issued on 16 July 2014 rather than the Accounting and Reporting by Charities: Statement of Recommended Practice effective from April 2005 which has since been withdrawn”.

The trust constitutes a public benefit entity 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 have considered cash flow requirements for the period to the end of 2024 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.

Unrestricted 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.

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (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 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 year-end are noted as a commitment but not accrued as expenditure.

Support costs comprise management and administration costs for the running of the charity.

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 fundraising 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).

The Trustees have reviewed and updated in comparison to previous years, cost allocations for 2022 and used the following bases to allocate costs between Fundraising and Charitable Activities as follows:

- *Staff costs* – allocated to fundraising activities and raising funds based on the % of time spent by individual staff members
- *Office and administration costs* – 15.2% Fund Raising and 84.8% Charitable Activities
- *Rent* – 15.2% Fund Raising and 84.8% Charitable Activities
- *Insurance* – 15.2% Fund Raising and 84.8% 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 2022 (continued)

Charitable activities

Costs of charitable activities include grants made, direct costs of delivering projects and an apportionment of support and governance 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 - 3 years
- Office Equipment - 5 years
- Website - 3 years

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 Institute 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 profit 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.

Leased assets

Office rent is 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 2022 (continued)

2 Income from donations and legacies

	Unrestricted funds £	Restricted funds £	2022 £	2021 £
Membership subscriptions	3,666	887	4,553	5,051
Legacies	4,409	-	4,409	81,811
Donations	132,217	57,014	185,148	169,513
Donations in lieu of Speaker Income	227,439	26,502	253,941	62,814
Guardianship programme	447	2,885	3,332	2,284
The Peak Society	471	29	500	1,500
Total	<u>368,649</u>	<u>87,317</u>	<u>455,966</u>	<u>322,973</u>

3 Income from charitable activities

	Unrestricted funds £	Restricted funds £	2022 £	2021 £
Provision of services	125,000	125,000	250,000	250,000
Total	<u>125,000</u>	<u>125,000</u>	<u>250,000</u>	<u>250,000</u>

4 Income from other trading activities

	Unrestricted funds £	Restricted funds £	2022 £	2021 £
Presentations and events	53,250	-	53,250	19,255
Proceeds of sale of books and merchandise	2,274	-	2,274	2,112
Total	<u>55,524</u>	<u>-</u>	<u>55,524</u>	<u>21,367</u>

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (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.

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 note 7b:

	Raising Funds	Charitable Activities	Total	Raising Funds	Charitable Activities	Total
	£	£	2022 £	£	£	2021 £
Support Cost Allocation						
Staff costs	25,560	76,756	102,316	8,392	50,962	59,354
Office and administration	4,260	12,793	17,053	4,165	14,485	18,650
Rent	1,732	5,201	6,933	1,492	5,190	6,682
Insurance	644	1,935	2,579	566	1,967	2,533
Consultancy Fees	-	-	-	11,367	-	11,367
Governance costs	-	5,170	5,170	-	15,849	15,849
Total	<u>32,196</u>	<u>101,855</u>	<u>134,051</u>	<u>25,982</u>	<u>88,453</u>	<u>114,435</u>

6 Expenditure on raising funds

	Unrestricted Funds	Restricted Funds	Total	Unrestricted Funds	Restricted Funds	Total
	£	£	2022 £	£	£	2021 £
Direct Fundraising Costs						
Direct Staff Costs	33,895	-	33,895	12,800	-	12,800
Purchases of books and merchandise for resale	1,036	-	1,036	955	-	955
Presentations and events	13,863	-	13,864	2,108	-	2,108
Other fundraising costs	243	65	308	1,366	1,073	2,439
Support cost allocation (note 5)	26,312	5,884	32,196	25,982	-	25,982
Total	<u>75,349</u>	<u>5,949</u>	<u>81,298</u>	<u>43,211</u>	<u>1,073</u>	<u>44,284</u>

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

7a Expenditure on charitable activities	Unrestricted Funds £	Restricted Funds £	2022 £	Unrestricted Funds £	Restricted Funds £	2021 £
Direct Costs						
Direct Staff Costs	12,750	102,628	115,378	90,734	9,249	99,983
Direct Activities Undertaken	67,306	926	68,232	2,651	32,170	34,821
Direct support Costs	517	7,490	8,007	-	13,881	13,881
Grant Funding of Activities	56,075	79,750	135,825	59,280	89,665	148,945
Support Costs allocation (See note 5)	81,494	20,361	101,855	66,678	21,775	88,453
Total	218,142	211,155	429,297	219,343	166,740	386,083

7b Expenditure on charitable activities – By Programme

The charitable activities of the organization include:

- **Africa Community Conservation & Chimp Sanctuaries:** supporting community conservation projects delivered by other JGIs in Africa and supporting JGI sanctuaries in Africa for orphan chimpanzees illegally taken from the wild
- **Roots & Shoots UK & UAE:** delivering the environmental and humanitarian educational programme for young people in the UK and the UAE
- **Awareness & Policy Activity in the UK:** raising awareness in the UK of issues such wildlife trafficking and sharing news about the chimpanzee families and on-going JGI scientific research into wild chimps in Gombe.
- **Roots & Shoots International Growth** - as detailed on page 8, the Institute received £125,000 of restricted funding in 2021 from DP World, of which £68,750 was donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit. As per the Agreement with DP World, £25,000 was restricted to Roots & Shoots projects in Africa, £25,000 restricted to Roots & Shoots projects around the world (excluding the UAE and Africa) and £18,750 to cover the resource costs of managing this programme.

	Unrestricted funds £	Restricted funds £	2022 £	Unrestricted Funds £	Restricted Funds £	2021 £
Africa Community Conservation & Chimp Sanctuaries						
Grant Funding of Activities	56,075	10,824	66,899	59,280	20,915	80,195
Direct Staff Costs	2,926	-	2,926	1,236	-	1,236
Direct Activities Undertaken	-	-	-	1,242	-	1,242
Allocated Support Costs	8,824	2,205	11,029	7,219	-	7,219
Total	67,825	13,029	80,854	68,977	20,915	89,892
Roots & Shoots UK & UAE						
Direct Staff Costs	-	102,628	102,628	84,863	9,249	94,112
Direct Activities Undertaken	67,306	926	68,232	-	32,170	32,170
Direct Support Costs	517	7,491	8,008	-	13,881	13,881
Grant Funding of Activities	-	176	176	-	-	-
Allocated Support Costs	31,145	7,782	38,927	25,482	16,254	41,736
Total	98,968	119,003	217,971	110,345	71,554	181,899
Roots & Shoots International Growth*						
Grant Funding of Activities	-	68,750	68,750	-	68,750	68,750
Allocated Support Costs	7,786	1,945	9,731	6,371	5,521	11,892
Total	7,786	70,695	78,481	6,371	74,271	80,642

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

***Roots & Shoots International Growth**

Grant Funding of Activities	£50,000
Direct staff costs	£18,750

As detailed on page 8, the Institute received £125,000 of restricted funding in 2022 from DP World, of which £68,750 was donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit. As per the Agreement with DP World, £25,000 was restricted to Roots & Shoots projects in Africa, £25,000 restricted to Roots & Shoots projects around the world (excluding the UAE and Africa) and £18,750 to cover the resource costs of managing this programme.

Awareness & Policy Activity in the UK

Direct Staff Costs	9,824	-	9,824	4,635	-	4,635
Direct Activities Undertaken	-	-	-	1,409	-	1,409
Allocated Support Costs	33,739	8,429	42,168	27,606	-	27,606
Total	43,563	8,429	51,992	33,650	-	33,650

Total	218,142	211,156	429,298	219,343	166,740	386,083
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Grants to Organisations

	Unrestricted funds	Restricted funds	2022	Unrestricted Funds	Restricted Funds	2021
	£	£	£	£	£	£
JGI Chimp Eden	27,876	9,412	37,288	29,890	4,000	33,890
JGI Senegal	24,000	1,412	25,412	29,390	5,000	34,390
JGI Uganda	4,199	-	4,199	-	-	-
JGI Burundi	-	176	176	-	-	-
JGI Global	-	68,750	68,750	-	68,750	68,750
JGI Tchimpounga	-	-	-	-	11,915	11,915
Total	56,075	79,750	135,825	59,280	89,665	148,945

8 Net income for the year

	2022	2021
	£	£
This is stated after charging:		
Independent examiner's fee	2,200	3,180
Depreciation	2,608	1,777
	<u> </u>	<u> </u>

9 Staff costs

	2022	2021
	£	£
Wages and salaries	218,216	147,540
National insurance costs	19,579	11,834
Pension costs	8,732	5,940
	<u> </u>	<u> </u>
Total	246,527	165,314
	<u> </u>	<u> </u>

There is one (2021: zero) employee with emoluments within the salary band £70,000 - £80,000. In addition, one (2021 : none) further employee had a full time equivalent salary within the salary band £70,000 - £80,000.

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

The average number of employees during the year was 5 (2021 - 4). In addition, a temporary Fundraising Assistant was employed for a three-month period to deliver a substantial redevelopment of our contact database and to support the development of our new sustainable clothing range.

Full time Equivalent Employees	2022	2021
Full time Employees	4.0	3.0
Part-time Employees	0.8	0.8
Total FTE Employees	4.8	3.8

Key Management Personnel

The Trustees consider the CEO as comprising the key management personnel of the charity.

The total amount of employee benefits received by key management personnel in 2022 was £84,238 (2021 £62,068 - the CEO joined in May 2021, therefore costs relating to the Executive Director, Education (who reports into the CEO) were included for January – April 2021).

10 Trustee remuneration and expenses

None of the Trustees, nor any persons connected with them, received any remuneration during the year from the Institute (2021 - £Nil). The charity insurance policy for 2022 and 2021 included Trustee Indemnity Insurance. The cost of the Trustee Indemnity Insurance element of the policy is not separately identifiable.

During the year no trustees received reimbursement of expenses (£Nil – 2021).

11 Taxation

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

12 Tangible fixed assets

	Website	Office equipment	Computer equipment	Total
	£	£	£	£
<i>Cost</i>				
At 1 January 2022	1,200	330	4,815	6,345
Additions	-	-	1,932	1,932
At 31 st December 2022	1,200	330	6,747	8,277
<i>Depreciation</i>				
At 1 January 2022	253	72	2,326	2,651
Provided during year	400	65	2,142	2,607
At 31 December 2022	653	137	4,468	5,258
<i>Net book value</i>				
At 1 January 2022	947	258	2,489	3,694
At 31 December 2022	547	193	2,279	3,019

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

13 Stock	2022	2021
	£	£
Books	7,712	7,685
Merchandise	3,530	3,769
	<u> </u>	<u> </u>
Total	11,242	11,454
	<u> </u>	<u> </u>
14 Debtors	2022	2021
	£	£
Other debtors	2,547	1,329
Prepayments	7,590	5,961
	<u> </u>	<u> </u>
Total	10,137	7,290
	<u> </u>	<u> </u>
15 Creditors: amounts falling due within one year	2022	2021
	£	£
Trade creditors	14,934	4,370
Trustee loan	10,130	10,130
Accruals	8,193	5,390
Taxation and social security	5,958	5,364
Pension creditor	2,109	1,961
Other creditors	743	-
	<u> </u>	<u> </u>
Total	42,067	27,215
	<u> </u>	<u> </u>

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022(continued)

16 Restricted funds

	Balance at 01/01/2022	Income	Expenditure	Balance at 31/12/2022
	£	£	£	£
Roots & Shoots UK	24,647	46,121	(70,620)	148
Roots & Shoots UAE	-	60,877	(50,486)	10,391
Tchimpounga	1,026	4,730	-	5,756
Senegal	741	765	(1,433)	73
Chimp Eden	2,245	9,199	(9,464)	1,980
Restricted JGI UK	-	21,875	(16,351)	5,524
JGI Global DP World	-	68,750	(68,750)	-
Total	28,659	212,317	(217,104)	23,872
Restricted funds - prior year	Balance at 01/01/2021	Income	Expenditure	Balance at 31/12/2021
	£	£	£	£
Roots & Shoots UK	-	68,389	(43,742)	24,647
Roots & Shoots UAE	-	25,000	(25,000)	-
Tchimpounga	8,117	4,824	(11,915)	1,026
Senegal	5,000	756	(5,015)	741
Chimp Eden	-	6,261	(4,016)	2,245
Restricted JGI UK	-	9,375	(9,375)	-
JGI Global DP World	-	68,750	(68,750)	-
Total	13,117	183,355	(167,813)	28,659

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

Restricted Funds Description

Roots & Shoots UK

Funds restricted by donors to support deliver of Roots & Shoots, our free environmental and humanitarian programme for young people, in the UK.

Roots & Shoots UAE

Funds restricted by donors to support deliver of Roots & Shoots, our free environmental and humanitarian programme for young people, in the UAE.

Tchimpounga

For many years the Institute has proudly supported the Tchimpounga Chimpanzee Rehabilitation Centre run by *the Jane Goodall Institute, Republic of Congo*, via our Chimp Guardian programme which offers symbolic adoptions of rescued chimps. 80% of Chimp Guardian income is donated to Tchimpounga to contribute towards providing food, medicine, enrichment and care for chimps at the centre and 20% contributes towards our costs in running and promoting the programme in the UK.

Senegal

Funds restricted for Senegal are to support the protection of the critically endangered Western chimpanzee and reversing deforestation through community led initiatives. Funds are donated to our sister organisation '*Instituto Jane Goodall*' (*the Jane Goodall Institute Spain*) which operates with a local field team in the Kédougou region of southeastern Senegal and across the border, in northern Guinea using the Tacare community conservation approach developed by Dr Jane Goodall.

Chimp Eden

Funds restricted for Chimp Eden, are to support the Chimp Eden sanctuary in South Africa. Funds are donated to the *Jane Goodall Institute South Africa* which runs the sanctuary providing a safe haven for rescued chimps from across Africa. Established in 2006, this very special sanctuary is home to chimpanzees rescued from across Africa who have survived the bushmeat trade, been orphaned, sold in illegal pet markets, or used as entertainment in circuses, beach resorts and night clubs.

Restricted JGI UK

Funds donated by DP World and restricted to support delivery of the DP World agreement.

JGI Global DP World

As detailed on page 6, the Institute is proud to have developed an agreement with DP World that shares income from its funding with other JGIs around the world - as such from the first-year funding payment, £25,000 was restricted to Roots & Shoots projects in Africa and another £25,000 restricted to Roots & Shoots projects around the world (excluding the UAE and Africa). This £50,000 expenditure was held in the 'JGI Global' restricted fund prior to being donated to the Jane Goodall Institute Global (a charity registered in England & Wales No. 1153284) which has an international remit, to distribute to Roots & Shoots projects around the globe. As per the Agreement with DP World, a further £18,750 was donated to the Jane Goodall Institute Global to cover the resource costs of managing the Roots & Shoots international growth programme.

DP World contributed restricted funding of £125,000 across a number of the above restricted funds as follows

Roots & Shoots UK	£25,000
Roots & Shoots UAE	£21,875
Restricted JGI	£ 9,375
JGI Global	£68,750

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

17	Analysis of net assets between funds	Unrestricted	Senegal	Congo	Roots & Shoots		Roots & Shoots UAE	Chimp Eden	Rest JGI	JGI Global		Total Restricted	Total 2021
					UK	£				£	DP World		
	Fixed Assets	£	£	£	£	£	£	£	£	£	£	£	£
	Cash at bank	3,019	-	-	-	-	-	-	-	-	-	-	3,019
	Other current assets	610,869	(35)	5,519	10,365	18,758	730	8,024	-	-	43,361	-	654,230
	Creditors falling due within one year	19,462	108	237	161	161	1,250	-	-	-	1,917	-	21,379
		(20,661)	-	-	(10,378)	(8,528)	-	(2,500)	-	-	(21,406)	-	(42,067)
	Total net assets at 31 December 2022	612,689	73	5,756	148	10,391	1,980	5,524	-	-	23,872	-	636,561

18	Analysis of net assets between funds (prior year)	Unrestricted	Senegal	Congo	Roots & Shoots		Roots & Shoots UAE	Chimp Eden	Rest JGI	JGI Global		Total Restricted	Total 2021
					UK	£				£	DP World		
	Fixed Assets	£	£	£	£	£	£	£	£	£	£	£	£
	Cash at bank	3,694	-	-	-	-	-	-	-	-	-	-	3,694
	Other current assets	358,598	633	676	27,076	1,437	1,136	-	-	-	30,958	-	389,556
	Creditors falling due within one year	17,177	108	350	-	-	1,109	-	-	-	1,567	-	18,744
		(23,349)	-	-	(2,429)	(1,437)	-	-	-	-	(3,866)	-	(27,215)
	Total net assets at 31 December 2021	356,120	741	1,026	24,647	-	2,245	-	-	-	28,659	-	384,779

The Jane Goodall Institute (UK)
Notes forming part of the financial statements
for the year ended 31 December 2022 (continued)

18 Financial commitments

As at 31 December 2022, the charity had total annual commitments under non-cancellable property leases as set out below:

	2022	2021
	£	£
Not later than one year	6,666	6,666
Within two to five years	4,068	4,068
	10,734	10,734

19 Related party transactions

For many years the Institute has offered a number of books, written by Dr Jane Goodall, for sale as a way of raising revenue for the charity and to also advance education and increase awareness of conservation issues. The books are purchased at a discounted rate (usually 50%) directly from the publisher and so any royalty benefit to Dr Goodall is likely to be small. The trustees consider that the purchase of these books and their sale is in the best interests of the charity and is permissible under the Charities Act. In 2022, the cost of books written by Dr Jane Goodall that were purchased by the Institute was £824 (2021: £5,479).

The Trustee loan, included within 'Creditors: amounts falling due within one year' of £10,130 (2021 : £10,130) is unsecured, interest free and repayable by agreement between The Jane Goodall Institute (UK) and the Trustee.

Dr Jane Goodall is a Trustee of JGI USA and Mary Lewis receives remuneration as a consultant for JGI USA. In January 2023, the Institute donated £4,000 (2021, £11,915, of which £8,117 related to 2020) to the JGI Tchimpounga sanctuary via JGI USA which handles income generation for the sanctuary. During the year \$5,000 (£4,199) was donated to the Jane Goodall Institute Uganda via JGI USA which handles income generation for the JGI Uganda office.