



**CHARITY COMMISSION**  
FOR ENGLAND AND WALES

## Trustees' Annual Report for the period

**From** 01/04/2022    **Period start date To** 31/03/2023    **Period end date**

**Charity name:** The Aaron Lewis Foundation

**Charity registration number:** 1151539

## Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	<p>1. The transformation of lives through sport, access to wellbeing and community-based activities in the Essex area and throughout the UK (for service and ex-service personnel).</p> <p>2. Wherever possible, the Foundation will make direct contributions to selected causes (rather than as a feeder charity for other organisations) except where specialist skills / knowledge exists and the addition of Foundation funding will see a project to completion.</p> <p>3. The Foundation will collaborate with other charities / groups where a combined benefit to a recipient can be realised.</p>
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	<p>2022-23 allowed the Aaron Lewis Foundation (ALF) to return to near-normal levels of activity with some excellent events and generous support permitting grant giving at a much higher level (on par with pre-COVID-19 levels).</p> <p>To reinforce the public profile at an increasing number of events, new display boards and signage was procured and the team received positive feedback at events from the refreshed image and the handout of free pens and stickers procured in the previous FY.</p> <p>The Rugby 10s tournament attracted a large number of teams and supporters; further strengthening the ALF historic ties with Aaron's former club who continue to host the event, and flying the ALF flag over an event that has become synonymous with the ALF spirit of team work and endeavour.</p> <p>Access to sport and the outdoors, through enabling equipment was a huge part of the year's work with sole and collaborative funding for some expensive but technically advanced items included powered</p>

		<p>wheelchairs / wheelchair add-ons and sporting wheelchairs. We were also able to fund further First Aid training in Colchester, help a disabled veteran open his own gymnasium and supply Christmas gifts to several needy families in Essex through approved referrals from by social services.</p> <p>There were no applicants for the School's (overseas volunteering) Award scheme due to the teaching lead moving schools, and the ALF 10s touring team continued to take a break from playing.</p>
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	<p>The Trustees remain aware of their duties in respect to the Charity Commission's guidance on public benefit and have carried out their duties in accordance with this guidance.</p> <p>In addition, all those involved in the management and leadership of the ALF were reminded about their collective responsibilities in this respect at the AGM which took place on 27 Nov 22.</p>

#### **Additional information (optional)**

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	There was no change of policy on grant making but the ALF 'Request for Assistance' form was updated to include GDPR compliant information.
Policy on social investment including program related investment	Para 1.38	Not applicable.
Contribution made by volunteers	Para 1.38	<p>As an all-volunteer charity, the ALF could not function without this support and this all-volunteer operation has been recognised more widely by several donors in the year.</p> <p>As part of the AGM Standing Agenda, all volunteers are formally asked if they are happy to remain in role and / or have any ideas for additional volunteers.</p> <p>The heavy workload of the Founder and Head of Branding (Ryan Brown) led to him advising the Trustees that he would stand down in 2023. This gave sufficient notice to seek an alternative for media and publishing tasks (which has been done).</p>
Other		With the re-start of public activities, the Public and Employers Liability insurance policy was renewed.

## Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>There were a number of highlights in the year including helping a disabled veteran in Exeter to become a wheelchair Guinness World Record holder (on route to 4 associated titles) and seeing a paralysed former Royal Navy beneficiary in Cornwall finally able to get to the beach unaided – his, and other follow up contact from beneficiaries was quite inspiring for all concerned and has positively contributed to the wider ALF image (both in Essex and further afield in the service and veterans community).</p> <p>The provision of equipment to allow a disabled veteran to open his own gym (and thus become non-benefit dependent) was a privilege although sadly he, and another beneficiary did not wish to publicise the support received. The ALF continues to respect this position which is why an appropriate grant will never be denied simply because a beneficiary wishes to remain anonymous.</p> <p>Having made a large donation towards a recreational welfare vehicle for Aaron's former Regiment (29 Commando), it was a delight for the Trustees and Aaron's family to attend an unveiling event as part of the Regiment's 60<sup>th</sup> anniversary celebrations. This wonderful outcome was heightened further by a subsequent (and extremely generous) donation from a former service colleague of Aaron's following the event.</p>

### Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<p>Plans to organise a 3 Peaks Memorial and Fundraising event were deferred due to the high level of planning required across an already busy team of volunteers – this will be considered for a future action.</p> <p>The lack of uptake for the School Award Scheme is a disappointment but this will hopefully re-gain traction once a suitable school-based lead can be identified. If this is not forthcoming (or an alternative local school with a focal point cannot be found) the scheme will be withdrawn.</p> <p>A long term objective of improving unity of reporting between the various ALF media outlets made headway with a review of roles and responsibilities and the identification of a professionally qualified journalist to join the team. This work continues with a planned</p>
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		refresh of the ALF website and social media outlets in 2023-2024.
Performance of fundraising activities against objectives set	Para 1.41	<p>The success of the rugby 10s and bi-annual sporting event fundraisers (golf / snooker marathons) continues to highlight how well respected the ALF remains locally and how these events (and the publicity from recent beneficiaries) has triggered generosity in many other quarters.</p> <p>Despite expenditure exceeding income again (and caution raised by the Treasurer to this affect at the AGM) the Trustees decided that a targeted fundraising plan was not required but advised the Sponsorship and Fundraising leads to investigate opportunities if required (noting the ALF Public Liability insurance would need to be amended to cover any ALF planned events accordingly).</p> <p>One such opportunity was to find a regular sponsor for the rugby 10s event costs. This was achieved for the first time in 2022 and is expected to become a new and enduring level of support.</p>
Investment performance against objectives	Para 1.41	Not applicable; the ALF has no investments.
Other		

## Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>Despite payments exceeding receipts for another year, the financial position remains very healthy for such a small charity and continues to permit grant giving to meet approved demand.</p> <p>The ALF prides itself on the minimal level of administrative costs and the generosity of all involved who provide most / all of their support at personal cost.</p> <p>It is acknowledged that more needs to be gained from planned events (with harder income targets established) to allow the Trustees to set revised fundraising targets in year if needed.</p>
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	<p>With no fixed assets or liabilities and only minor recurring standing costs (i.e. Just Giving monthly charge) and with grants only being agreed following pre-approval scrutiny by the Trustees and Treasurer, no reserves are held.</p> <p>Funds were ringfenced (by AGM vote) for 3 students / year to participate in the School Award Scheme (£4500 / year) but due to a lack of ongoing uptake, these funds have been released back as general purpose funds.</p>
Amount of reserves held	Para 1.22	Nil.
Reasons for holding zero reserves	Para 1.22	As above.
Details of fund materially in deficit	Para 1.24	None.
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	None – see attached IER.

### Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	<ol style="list-style-type: none"> <li>Two planned events / year (rugby 10s and golf or snooker marathon)</li> <li>Donations / sponsorship from regular individual or group donors and those who donate following an event or sight of support.</li> </ol>
Investment policy and objectives including any social investment policy adopted	Para 1.46	None.
A description of the principal risks facing the charity	Para 1.46	<p>No risks have been identified or articulated but it is acknowledged that:</p> <ol style="list-style-type: none"> <li>the ALF is reliant on some key volunteers (including a professionally qualified</li> </ol>

		<p>treasurer) and finding suitable replacements could be a challenge if needed. This has been addressed with ongoing volunteer advertising via media outlets and events.</p> <p>2. A large amount of grant giving came about due to the 3<sup>rd</sup> sector role of a Trustee. That has now ceased with a change of employment, and the Trustees are concerned that identifying appropriate cases to support <i>could</i> become challenging. This will be addressed via outreach in the Essex area and through former service and 3<sup>rd</sup> sector colleagues to target a spread of potential beneficiaries.</p>
Other		None.

## Structure, Governance and Management

Description of charity's trusts:		
Type of governing document (trust deed, royal charter)	Para 1.25	Trust Deed
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	Trust
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Endorsement, agreement and unanimous election by the existing Trustees in accordance with Para 6 of the ALF Constitution.

### Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	None. All new volunteers are briefed by the Trustees and provided with a copy of the most up to date constitution to read and sign.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<p>The current organisational structure works extremely well although the planned exit of the Founder / Head of Branding presented a potential risk until a professionally qualified volunteer (journalist) came forward.</p> <p>The 3 Trustee format is extremely effective for decision making although to date, there has been no cause to invoke a majority vote on any issue or proposal raised.</p> <p>Partnerships with other local organisations have been fruitful in the past but require careful management to ensure grant support can be given while remaining within the ALF objects. The ongoing (confidential) relationship with Social Services in Essex and larger charities has been very productive across a number of grant giving cases in the past.</p> <p>The early success of the School Award scheme brought great satisfaction and attracted a future generation of highly motivated ALF supporters. It is hoped therefore that it will not be long before this is re-established.</p>
Relationship with any related parties	Para 1.51	
Other		

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## Reference and Administrative details

Charity name	The Aaron Lewis Foundation
Other name the charity uses	ALF
Registered charity number	1151539
Charity's principal address	37 Rectory Avenue Rochford Essex SS4 3AW



**Names of the charity trustees who manage the charity**

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Mrs Helen Lewis	Archivist		
2	Mr Steven Fraser	Secretary		
3	Mr Simon Jones			

Corporate trustees – names of the directors at the date the report was approved

Director name		
None.		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	
None.		

## Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	None.
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

### Additional information (optional)

#### Names and addresses of advisers (Optional information)

Type of adviser	Name	Address
None.		

#### Name of chief executive or names of senior staff members (Optional information)

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## Exemptions from disclosure

Reason for non-disclosure of key personnel details

None.
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## Other optional information

The ALF is now in its 10<sup>th</sup> year (as an all-volunteer charity) and continues to make a real difference both in the local community in Essex and further afield supporting service personnel and veterans. It's success is exemplified by the continuing levels of voluntary support (both financial and practical) and its liquidity state – enabling carefully approved grant giving, across a number of it's objects at a high level.

Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)	<i>Steve Fraser</i>	
Full name(s)	Steven David Fraser MBE	
Position (eg Secretary, Chair, etc)	Secretary	
Date	7 January 2024	



CHARITY COMMISSION  
FOR ENGLAND AND WALES

The Aaron Lewis Foundation

1151539

## Receipts and payments accounts

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For the period from	01/04/2022	To	31/03/2023
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### Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
<b>A1 Receipts</b>					
Fundraising events	10,397	-	-	10,397	13,574
Donations	25,550	-	-	25,550	2,962
Bank interest	98	-	-	98	104
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total (Gross income for AR)</b>	<b>36,045</b>	<b>-</b>	<b>-</b>	<b>36,045</b>	<b>16,640</b>
<b>A2 Asset and investment sales, (see table).</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>36,045</b>	<b>-</b>	<b>-</b>	<b>36,045</b>	<b>16,640</b>
<b>A3 Payments</b>					
Cost of fundraising events	3,153	-	-	3,153	1,871
Grants and donations paid	45,411	-	-	45,411	15,494
Bank charges	216	-	-	216	216
Stationery and sundries	946	-	-	946	410
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>49,726</b>	<b>-</b>	<b>-</b>	<b>49,726</b>	<b>17,991</b>
<b>A4 Asset and investment purchases. (see table)</b>					
	-	-	-	-	-
	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>49,726</b>	<b>-</b>	<b>-</b>	<b>49,726</b>	<b>17,991</b>
<b>Net of receipts/(payments)</b>	<b>- 13,681</b>	<b>-</b>	<b>-</b>	<b>- 13,681</b>	<b>- 1,351</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>98,132</b>	<b>-</b>	<b>-</b>	<b>98,132</b>	<b>99,483</b>
<b>Cash funds this year end</b>	<b>84,451</b>	<b>-</b>	<b>-</b>	<b>84,451</b>	<b>98,132</b>

## Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
<b>B1 Cash funds</b>	Cash accounts	84,451	-	-
		-	-	-
		-	-	-
	<b>Total cash funds</b>	84,451	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
<b>B2 Other monetary assets</b>	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
<b>B3 Investment assets</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
<b>B4 Assets retained for the charity's own use</b>	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
<b>B5 Liabilities</b>	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
			-	
			-	
			-	
			-	
Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval	
		S Fraser	26/11/2023	



Section A

Independent Examiner's Report

Report to the trustees/  
members of

Charity Name  
The Aaron Lewis Foundation

On accounts for the year  
ended

31/03/2023

Charity no  
(if any)

1151539

Set out on pages

1-2

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2023.

Responsibilities and  
basis of report

As the charity trustees of the Trust, 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 Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent  
examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

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

Signed:

*L Renault*

Date:

14/12/2023

Name:

Louise Renault

Relevant professional  
qualification(s) or body  
(if any):

FCCA

Address:

18 Earls Hall Avenue

Southend-on-Sea

Essex SS2 6PD

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

**Give here brief details of any items that the examiner wishes to disclose.**