



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 01/04/2023 Period start date To 31/03/2024 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 Aaron Lewis Foundation (herein known as The ALF) will make direct contributions to agreed causes (rather than as a feeder charity for other organisations) except where specialist skills / knowledge exists in another organisation and the addition of ALF funding will help a project reach completion.</p> <p>3. The ALF will collaborate with other charities / groups where a combined benefit to a recipient can be realised (provided that the project falls within mandate).</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>As well as a steady engagement with Armed Forces veterans, we had some worthy local (Essex based) applicants – all referred through people known to the ALF. After working closely with NHS and statutory services we were able to provide equipment for 4 disabled children and 1 adult making a real difference to them and their families. It was also very satisfying that 1 item was provided in collaboration with another Foundation.</p> <p>In keeping with our commitment to sport and sports equipment, we supplied another specialist rugby wheelchair to an amputee veteran and, through his role as a coach and chairman of a veterans facing wheelchair rugby club, agreed to further support (on and off the court) for the team in the next FY. We were also able to re-gift a hand-bike that was purchased for a previous beneficiary who had grown out of it and had given it back.</p>

		<p>Having previously contributed to a welfare motorhome for Aaron's Regiment, we agreed to fund the annual service, some minor repairs and vehicle health check and contributed (silently) to a welfare fund for a terminally ill member of the Regiment. The latter is a slight departure from our mandate but the Trustees agreed it was a worthy action with good intent.</p> <p>The School Award Scheme still did not attract any interest but the Trustees agreed to keep it active while discussions continue with the school-based point of contact (who is just settling in to a new school and where we hope to re-launch the scheme).</p> <p>The Rugby10s Tournament was very well attended and supported (including overseas teams) and once again covered its running costs through pre-event sponsors and donors. The revised (trial) management and funding model will now continue to be used.</p> <p>As always, our costs were minimal (6% of overall expenditure) reflecting our unified stance of keeping costs to a minimum to enhance beneficiary giving. Some cost uplift was unavoidable (Public Liability Insurance and a better storage solution for our gazebo and other equipment) and the Trustees are actively seeking future savings for both.</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 (and other key management factors) at the AGM which took place on 26 Nov 23 and received a copy of the latest Constitution and other relevant governing documents.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	<p>In order to target more beneficiaries, discussions took place in January to expand the geographic footprint to include Kent. This was based on:</p> <ul style="list-style-type: none"> - proximity to the home base in Essex; - presence of a volunteer in Kent; - possibility of re-launching the School Award Scheme in his school. <p>This did not gain any traction and was</p>

		discarded in lieu of other ideas. There was no change of policy on grant making but the ALF 'Request for Assistance' form and other governing documents were updated to include more current (post Brexit) 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 has been recognised again by a number of donors who opted to support us rather than bigger (national) charities for this reason.</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 or roles.</p> <p>Following the work-related departure of the Founder, a replacement Marketing and Communications volunteer was sought and found very quickly and came on board early in the FY (with a professional marketing background). The impact was instant – especially in the review of our Social Media profile and policies.</p>

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>The ability this year to support Essex based families with disabled children / adults was humbling for all involved. Each family had a story to tell about the challenges they faced (especially where the support they required fell between the cracks of funded statutory provision). Despite presenting with some serious health issues, the well-established process for expert engagement and clinical due-diligence worked well, with supporting information provided quickly by healthcare professionals and equipment suppliers allowing payments to be made and needs to be met appropriately and promptly.</p> <p>Aside from the benefits of the event itself, the rugby 10s Tournament provided the perfect platform once again to formally present one of the supplied items. The impact on the family (through their words and actions) was palpable and was quoted back to the Trustees by a large donor later in the year.</p> <p>Sport has always been a focal point (based</p>

		<p>on Aaron's love of rugby and sports rehab) so the continued relationship with wheelchair rugby has sat well with all of the team. The sport continues to attract followers and some discussion took place to reach out to the governing body in 2023 to identify more beneficiaries nationally. However, with another local request received and more expected, this was not felt necessary yet. Rugby wheelchairs are expensive (circa £6k each) so this is a good area to support but with careful expansion.</p> <p>We continued to support (and be supported by) disabled World Record Holder Lexi Chambers. One of the Southwest based Trustees joined the team planning her 2024 John O'Groats to Lands' End (End2End) event and provided feedback to the ALF. It was agreed that we would support in person (and through our media channels) once the event started.</p> <p>Aaron's Regiment (29 Commando) remains at the forefront of UK operations and the relationship between the Regiment and the ALF remains firm. Any request from the Regiment for support goes through the same scrutiny as any other to ensure it meets our mandate. After a remarkable year of welfare mileage, it was therefore agreed to fund wear and tear repairs and hygiene tasks to ensure the welfare camper van remained viable – especially as its use and benefits had been highlighted on the BBC Commando: Britain's Ocean Warriors documentary.</p>
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Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<ol style="list-style-type: none"> 1. Re-launch of a secure website ahead of the End2End event (noting expected high levels media and public engagement). This was not achieved but engagement with the original site creators, improved access and the free creation of a new site (ready for public launch) was achieved. 2. Ensuring the 10s Tournament remains financially self-sustaining and viable. This was once again the case. The management and sponsorship approach has now been tested successfully and will be retained. 3. Expansion of the (non-services) beneficiary footprint. The idea to expand into Kent had merit but did not gain any traction so was discounted for now. 4. Engagement with County Army Cadet Forces (ACF) Headquarters. Offers of support to several counties were made (with discussions going further in
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		<p>Nottinghamshire) but without further uptake by the ACF.</p> <p>5. Re-launch of the School Award Scheme. With the move of the previous (school-based) lead, this remains stalled but discussions are underway to support planned overseas activities from mid-2024.</p>
Performance of fundraising activities against objectives set	Para 1.41	<p>Although the previous FY had led to an income over expenditure deficit, the ongoing success of the ALF to attract donors / sponsors through profile / reputation rather than targeted events meant (with the exception of the 10s Tournament) there were no fundraising targets set.</p> <p>However, the Treasurer was tasked with conducting long term I&E trend analysis and to report back on her findings (see below).</p>
Investment performance against objectives	Para 1.41	<p>The ALF has no investments but it was agreed to conduct a review of the market place in the 24/25 FY to investigate holding a small (accessible) interest earning reserve.</p>

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>Despite widespread efforts to identify and support cases within our mandate, and placing no demands on the team to specifically raise funds, there was a significant swing in favour of income over expenditure in this FY (+£24,179) compared to the previous FY where grant giving outpaced income by £9,366.</p> <p>The Treasurer advised the team at the AGM that year on year variation was to be expected but it was better to achieve a balanced budget. She also acknowledged the challenges faced from a generous (and unpredictable) supporter base and the identification of appropriate cases to support.</p> <p>Following a further detailed review of variations, the net movement of funds over 6 financial years (2018-2024) was -£30,780 which the Trustees felt was a good position to be in given the support achieved, the impacts of C19 and the ongoing low level of operating costs.</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 storage paid in advance) and with grants only being agreed following approval by the Trustees and scrutiny by the Treasurer, it was agreed again not to place any funds in reserve.</p> <p>Funds remain ringfenced annually for 3 students to participate in the School Award Scheme (£4500 / year) but due to a lack of ongoing uptake, where these are not consumed they are retained as part of general purpose funds.</p>
Amount of reserves held	Para 1.22	Nil.
Reasons for holding zero reserves	Para 1.22	The ALF has no fixed assets or liabilities associated with winding up if this were ever to occur.
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"> 1. One planned event / year (the rugby 10s Tournament) 2. Donations / sponsorship from individuals or groups and those who donate following attendance at an event or being made aware
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		of support given to others.
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>The Foundation is reliant on volunteers (including a professionally qualified treasurer) and finding suitable replacements could be a challenge if needed. The test of this took place with the departure of the Founder (at the end of the last FY) but a suitable replacement was quickly found through reputation of the ALF.</p> <p>Despite best efforts, we continue to struggle with identifying appropriate beneficiaries. This was reviewed again towards the end of the FY resulting in an advert being placed in Gunner Magazine (the Journal of The Royal Artillery) and continued attempts at engagement with previous beneficiaries and groups. A new role of Beneficiary Outreach (re-rolling of a current fundraiser) has been agreed to assist with post-support engagement and to provide offers if further help is required.</p>

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 Roles & Responsibilities (Trustees) section of the Foundation 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 (plus any other role-relevant documentation).
The charity's organisational structure and any wider network with which the charity works	Para 1.51	<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.</p> <p>The departure of the Founder (who had been responsible for Brand and Marketing)</p>

		<p>presented a risk that was quickly addressed.</p> <p>The creation of a Beneficiary Outreach role is in its early stages but it is hoped will lead to more offers of support to previous beneficiaries or people they know.</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 charitable objects. Attempts to expand this network have yielded little but will continue to be explored where appropriate.</p>
Relationship with any related parties	Para 1.51	None.

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
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None.		
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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.

Other optional information

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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	30 th December 2024	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Aaron Lewis Foundation

1151539

Receipts and payments accounts

CC16a

For the period from	01/04/2023	To	31/03/2024
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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 £
A1 Receipts					
Fundraising events	29,596	-	-	29,596	10,397
Donations	19,956	-	-	19,956	25,550
Bank interest	1,035	-	-	1,035	98
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	50,587	-	-	50,587	36,045
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	50,587	-	-	50,587	36,045
A3 Payments					
Cost of fundraising events	7,022	-	-	7,022	3,153
Grants and donations paid	18,227	-	-	18,227	45,411
Bank charges	244	-	-	244	216
Stationery and sundries	915	-	-	915	946
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	26,408	-	-	26,408	49,726
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	26,408	-	-	26,408	49,726
Net of receipts/(payments)	24,179	-	-	24,179	- 13,681
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	84,451	-	-	84,451	98,132
Cash funds this year end	108,630	-	-	108,630	84,451

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 £
B1 Cash funds	Cash accounts	108,630	-	-
		-	-	-
		-	-	-
	Total cash funds	108,630	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
B4 Assets retained for the charity's own use	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
B5 Liabilities	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	09/11/2024	



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
The Aaron Lewis Foundation

On accounts for the year
ended

31/03/2024

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 (other than that disclosed below *) 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.

* Please delete the words in the brackets if they do not apply.

Signed:

Louise Renaut

Date:

25/11/2024

Name:

Louise Renaut

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.