



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From 01/04/2024 **Period start date To** 31/03/2025 **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>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>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>The ALF will collaborate with other charities/groups where a combined benefit to a recipient can be realised (provided that the project falls within the ALF 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>The majority of grant giving this year was in support of veterans and serving members of the Armed Forces (13/16 grants). Our focus on sport and outdoor activities dominating grants across wheelchair rugby, disabled sailing, adventurous training, sports and other outdoor pursuits.</p> <p>Grants in the Essex area were notably less (compared to 2023-24) but still important and included tag rugby equipment for a school expedition to Borneo and a very large (70+) delivery of Christmas gifts for a Southend homeless centre and hospital ward. A more targeted approach for Essex recipients was discussed at the AGM, and this will be expanded in 2025-26.</p> <p>Following a change of school and role for the ALF linked/supporting teacher, the School Award Scheme took a revised approach at its re-launch; instead of just offering funding</p>

		<p>to school approved overseas event applicants, a student (without independent funding) was selected by school staff who will now be able to attend the next overseas school expedition in 2026. The wider grant offer also remained in place, but no applications were received.</p> <p>Despite dreadful weather, the ALF 10s tournament remained the cornerstone ALF delivered fundraiser with excellent support from home and overseas teams. A number of other (privately organised) fundraising events and donations from supporters generated very good income (50% from organised events/50% from donors and private events) that bolstered grant giving opportunities and enabled the purchase of much needed assets including a 2nd event gazebo, improved local storage and better (branded) advertising materials.</p> <p>Every effort was made to keep non-grant expenditure to a minimum although this was certainly higher than in previous years for the reasons outlined above. The cost of running fundraising events consumed 12% of overall income and the purchase of new equipment, liability insurance and storage the same. The latter expenditure should be greatly reduced in the next FY with assets now on hand.</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 9 Nov 24 and received a copy of the latest Constitution, accounts 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	There was no change of policy on grant making and all governing documents were reviewed to ensure they were compliant with current guidance/policy.
Policy on social investment including program related investment	Para 1.38	Not applicable.
Contribution made by volunteers		As an all-volunteer charity, the ALF could not function without this support and has been

	Para 1.38	<p>recognised again by a number of donors (especially corporates) 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>The recruitment in the previous FY of a new Marketing and PR volunteer quickly proved its worth allowing the ALF website to be transitioned to a new secure platform (for free) and the creation of a Google Collaborative working environment – both of which had been long standing issues. She was also able to rationalise the ALF social media platforms and ensure better content control and championed a better ‘About the ALF’ flyer for donors and events.</p> <p>The retention of a dedicated ALF 10s lead also proved beneficial due to his contacts with the host club and attending teams and, his understanding of the event’s objectives.</p>
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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 Beacon Homeless Veterans Centre in Catterick has benefited from a good level of grant funding so the Trustees visited while in Yorkshire supporting former beneficiary, Lexi Chambers, during her latest World Record event. The work of the centre really struck a chord allowing more support to be agreed during the visit and the development of some fundraising ideas by them in response. It was agreed they would attend the 2025 ALF 10s and bring some of their beneficiaries.</p> <p>Aside from the benefits of the event itself, the rugby 10s Tournament provided the perfect platform once again to formally present a granted item (a rugby wheelchair to a veteran from Cornwall) and to announce the World Record attempt plans by Lexi Chambers (including the intent to raise funds for us). The free 10s programme now forms the basis of a popular ‘year in review’ document for attendees and is handed out at all other events and opportunities.</p> <p>The provision of drysuits for 2 para-athletes competing in the RS Venture Para Dinghy World Championships was an excellent outcome for all involved and led directly to a major funding commitment for adaptive</p>

		<p>alpine skiing equipment (sit-skis) for injured veterans to use under the tutelage of the Army Adventurous Training Group. Unfortunately, only 1 sit-ski was delivered in year and the other will be completed in FY25-26.</p> <p>Being able to touch a number of lives at both the St Vincents Homeless Centre and Southend Hospital Children's Ward brought great comfort to Aaron's family and the wider ALF Team, especially in light of the lack of other local opportunities. The latter also allowed for collaboration with a local business.</p> <p>Finally, we were able to play a small part in the rehabilitation journey of an injured veteran as she used her ALF gifted rugby wheelchair as part of the Silver Medal winning GB Team at the Invictus Games in Canada. This was an inspiration for the whole team (and for the donors who had helped make it possible).</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 and collaborative working environment – success. 2. Rationalisation and greater control of messaging on social media platforms – success. 3. Re-launch of the School Award Scheme – success. 4. Identification of suitable beneficiaries – partial success. 5. Maintaining better contact with former beneficiaries to offer further support and to get updates on their outcomes; this saw some productive engagement with 2 former beneficiaries but not as much as was hoped – partial success. 6. In-person support to Lexi Chambers World Record event (JOGLE) – success. 7. More efficient grant request-review-approval-payment-publicity process; this was improved greatly with the latter action (timely publicity of outcomes) achieved by broadening team permissions to publish articles directly to the website – success.
Performance of fundraising activities against objectives set	Para 1.41	<p>Income exceeded expenditure by £9,591 which was a marked improvement on the previous FY (where excess of income over expenditure was £24,179). If the final sit-ski payment had been processed by the bank on time, the year-end I&E position would have been almost balanced in accordance with Treasurer guidance.</p>

		50% of income being generated by donors rather than planned fundraising activities is comforting but it is recognised that this cannot be relied upon, and more planned events may be required. A possible change of fundraising lead was discussed by the Trustees, and this is expected to occur in the next reporting period.
Investment performance against objectives	Para 1.41	Despite concluding research into a suitable investment platform and providing written authority (and policy) on investments to the Treasurer, ongoing banking issues (see below) hampered attempts to transfer funds to the agreed investment platform. This will be completed in the next reporting period.

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	<p>Given the higher-than-expected level of income over expenditure, the ALF ended the year £9,591 up on the previous year with £118,221 in available funds (not including assets valued on the Asset Register). This reflects a very consistent balance position before and including the C19 period where income versus expenditure has generally been close to parallel since the charity was created in 2011.</p> <p>In addition, a 14-year (FY2011-2025) analysis by the Trustees revealed the following data:</p> <ul style="list-style-type: none"> - Total income: £508,933 - Total expenditure: £388,277 - Grants paid: £300,206 (77% of total expenditure) - Average (annual) account balance: £104,386
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Although £20,000 has been ringfenced for a higher interest investment opportunity, this will be placed in an easy access account and, with no fixed assets or liabilities, the policy remains that no reserve is required above the value of the (current) average annual outgoings value of £27,734.
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	With average annual outgoings totalling £27,734 and a bank balance of £118,221 the charity remains a 'going concern' with more than 12 months funding available and no liabilities to be considered should it be forced to wind down.

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 Trustee directed fundraising event/year (rugby 10s tournament). 2. One regular supporter organised event/year (golf match or bar sports marathon). 3. Donations/sponsorship from individuals or groups.
Investment policy and objectives including any social investment policy adopted	Para 1.46	<p>£20,000 to be invested in an easy access, low risk account.</p> <p>No social investment intentions.</p>

A description of the principal risks facing the charity	Para 1.46	<p>1. Barclays Bank continue to indiscriminately block payments despite sufficient funds being available in the Community Account and Saver Account even if the Treasurer is attempting to pay a legitimate business or a previous payee. The bank will normally release funds if a 'faster payment' process is used (but this generates a £15 fee for every transaction). Face to face engagement with the bank has not resolved the issues so a formal complaint has been submitted to Barclays. Action will be taken to transfer the majority of funds to a different bank in the coming FY.</p> <p>2. If the current fundraising lead steps down, a replacement will be needed to offset any risk that the level of un-prompted supporter or ad-hoc donor contributions fall and more emphasis needs to be placed on planned events. However, the Trustees feel confident (given the account balance and history of outgoings) that the selection process does not need to be rushed.</p>
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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. The current Trustees have been in role since the ALF was created (no time limit has been set for Trustee rotation). If a new Trustee is appointed at any stage, a Charity Commission recommended induction pathway will be sought and implemented.
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. To date, there has been no cause to invoke a majority vote on any issue, request or proposal.</p> <p>The creation of a Beneficiary Outreach role has provided some benefit this year but needs further development by the Trustees</p>

		and post holder. Publicity brought through free advertising in Gunner Magazine (the Journal of the Royal Artillery) and several business forums in Essex (attended by the Marketing and PR lead) have all led to applications for support.
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 and Chair of Trustees		
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	N/A.
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	N/A.

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.

Other optional information

None.

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)	Chair of Trustees and Secretary	
Date	31 December 2025	



CHARITY COMMISSION
FOR ENGLAND AND WALES

The Aaron Lewis Foundation

1151539

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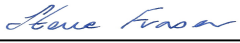
Receipts and payments accounts

For the period from	01/04/2024	To	31/03/2025
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Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Fundraising events	24,034	-	-	24,034	29,596
Donations	23,634	-	-	23,634	19,956
Bank interest	1,410	-	-	1,410	1,035
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	49,078	-	-	49,078	50,587
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	49,078	-	-	49,078	50,587
A3 Payments					
Cost of fundraising events	5,712	-	-	5,712	7,022
Grants and donations paid	27,873	-	-	27,873	18,227
Bank charges	216	-	-	216	244
Stationery and sundries	5,686	-	-	5,686	915
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	39,487	-	-	39,487	26,408
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	39,487	-	-	39,487	26,408
Net of receipts/(payments)	9,591	-	-	9,591	24,179
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	108,630	-	-	108,630	84,451
Cash funds this year end	118,221	-	-	118,221	108,630

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	118,221	-	-
		-	-	-
		-	-	-
	Total cash funds	118,221	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets	Details			
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
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	08/11/2025



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
The Aaron Lewis Foundation

On accounts for the year
ended

31/03/2025

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 31/03/2025.

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
- the accounts did 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.

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:

29/12/2025

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.