

The Adam Lewis Effect Foundation - #TALE

Trustee's Report 2nd October 2019 – 1st October 2020



Name: The Adam Lewis Effect Foundation CIO

Charity Number: 1161819

Registered Address: 41 Vincent Close, Old Hall, Warrington, WA5 8TA

Chair: Mrs Kim Lewis

Trustees: Mr Peter Lewis, Mr Neil Lewis, Miss Hannah Quirk, Mr Adam Hardman

Aim & Purpose:

THE ADVANCEMENT OF HEALTH AND THE SAVING OF LIVES BY SUPPORTING AND PROMOTING HEALTHY HEARTS IN ORDER TO AVOID OR PREVENT CARDIAC DEATH IN PEOPLE (IN PARTICULAR BUT NOT LIMITED TO THOSE UNDER 35 YEARS OF AGE) IN THE NORTH WEST OF ENGLAND AND, WHERE APPROPRIATE THROUGHOUT THE REST OF THE UNITED KINGDOM.

Objects:

- RAISING AWARENESS AND PROVIDING INFORMATION ON SUDDEN CARDIAC DEATH AND ON HEALTHY HEARTS;
- PROVIDING THE MEANS TO IDENTIFY CARDIAC PROBLEMS THROUGH THE PROVISION OF APPROPRIATE MEDICAL SCREENING AND TESTING;
- PROVIDING EQUIPMENT AND TRAINING TO ORGANISATIONS INCLUDING, BUT NOT LIMITED TO, DEFIBRILLATOR UNITS;
- BY PROVIDING SUCH OTHER SUPPORT AND BY SUCH OTHER CHARITABLE MEANS AS THE TRUSTEES DEEM FIT WITH THE AIM OF IMPROVING CARDIAC HEALTH IN PEOPLE OR REDUCING SUDDEN CARDIAC DEATH FOR THE PUBLIC BENEFIT.

Activity Summary

Infrastructure and Affiliations

We continue to work hard to maintain the right infrastructure to engage with an audience to support us. In the last 12 months, our Facebook community has increased by 7%. We have continued to maximise our strong affiliation with Cardiac Risk in the Young – another charity with similar aims to ours. We continue to maintain our established partnership that enables us to host heart screening days, with the screening completed by CRYs screening team. This partnership has enabled us to fund and carry out screening without having to invest in our own equipment and staff. During this financial period, over 99% of our spend has been on funding Heart Screening, with the remaining less than 1% of our spend being on our Just Giving subscription as our main donation service.

We have maintained strong affiliations with a number of local businesses in and around Warrington, including Unilever, Asda, David Lloyd, PS2 Digital, Burtonwood Community Centre, Swagelock, Solvay Interlox and M&S Warrington. We have also benefited from establishing our Amazon Smile and Facebook Giving donation services, as well as being a Co-Op Community Giving charity for a year. All of these organisations have made donations, enquired about or held screening and supported our cause in some way.

The COVID-19 pandemic has affected our fundraising targets, however we are fortunate that as our operating costs are so low, we have been able to continue to trade. We are also fortunate that our pre-booked and pre-paid for Heart Screening events have been postponed and no invested funds have been lost, so screening events carried out in 2021/2022 will be funded by carried-over funds from this year. The pandemic has hindered our efforts to carry out screening and fundraise, but we have been fortunate to have not lost any invested funds.

Donations & Fundraising

We have received many generous donations, funds raised at events, and matched funding. In total we have raised £21,122 in donations (up by £2,369 since last year), which was added to our starting balance of £15,987, despite 6 months of the year being affected by the COVID-19 pandemic.

Charitable Funding

We have continued to invest funds raised by providing free heart screening days in and around Warrington and the North West. All screening is purchased from Cardiac Risk in the Young, by making donations directly to their 'Adam Lewis Memorial Fund' at a cost of £50 per head.

- Credited to CRY AMF
 - £25,000 (for screenings booked 2020 – 2021)
 - 2 screening Days delivered (205 young hearts tested)
 - NB – 2 screening dates booked and paid for last year were postponed due to the COVID-19 Pandemic

Investments

We continue to operate with maximum efficiency, dedicated to spending as much of our raised funds on Heart Screening as possible. We're proud to say that this year over 99 pence of every £1 spent has funded heart screening.

- Infrastructure
 - Just Giving Subscriptions - £198

Accounts Summary

Opening Balance	£15,986.92
Total Received	£21,122.76
Total Spend	£25,198.00
Closing Balance	£11,911.68

Future Plans

We have a number of future plans, including:

- Funding of Heart Screening Days
 - 4 currently booked in for 2021/2022
- The launch of our Website is still pending
 - Including our web-store, selling apparel, wrist bands, car stickers etc.
- The Afternoon Tea Initiative
 - THIS INITIATIVE IS CURRENTLY ON HOLD DUE TO THE COVID-19 PANDEMIC
- Continuation of Fundraising
 - PUBLIC FUNDRAINING CURRENTLY ON HOLD DUE TO THE COVID-19 PANDEMIC
 - We continue to drive fundraising through local business donations, Community donations, Facebook Giving, Just Giving and Amazon Smile.
- New relationships to cultivate
 - The Cat FM Radio
 - Warrington Business Exchange
 - Warrington Schools

Summary

We are really proud to have built on the great work done in our third year to raise funds to have now benefited over 2500 young people, whilst still keeping costs to a minimum, all of which have set us up for success in starting to achieve our goals. Our plans are simply more of the same.

THE ADAM LEWIS EFFECT FOUNDATION CIO ANNUAL ACCOUNTS 02.10.19 - 01.10.20

DATE	TRANSACTION	INCOME	OUTGOING	BALANCE	What?
02/10/2019	STARTING BALANCE			£15,986.92	
05/10/2019	Event	£4,015.00		£20,001.92	Fund Raiser
08/10/2019	Event	£300.00		£20,301.92	Cash Deposit
17/10/2019	Donation	£1,500.00		£21,801.92	Bank
25/10/2019	Invoice Fee		£18.00	£21,783.92	Just Giving Fee
29/10/2019	Donation	£74.08		£21,858.00	Bank Transfer
01/11/2019	Invoice		£10,000.00	£11,858.00	Heart Screening Cost
06/11/2019	Donation	£131.72		£11,989.72	Bank Deposit
25/11/2019	Invoice Fee		£18.00	£11,971.72	Just Giving Fee
25/11/2019	Donation	£50.00		£12,021.72	Cash Deposit
26/11/2019	Donation	£3,025.00		£15,046.72	Cash Deposit
12/12/2019	Donation	£4,476.46		£19,523.18	Cheque Deposit
16/12/2019	Donation	£35.00		£19,558.18	Bank Transfer
17/12/2019	Event	£250.00		£19,808.18	M&S Bag Pack
23/12/2019	Event	£775.70		£20,583.88	M&S Bag Pack
23/12/2019	Event	£2,326.88		£22,910.76	Bank Deposit
24/12/2019	Donation	£132.70		£23,043.46	Cheque Deposit
27/12/2019	Invoice Fee		£18.00	£23,025.46	Just Giving Fee
30/12/2019	Donation	£30.00		£23,055.46	Cheque Deposit
10/01/2020	Invoice CRY		£15,000.00	£8,055.46	Heart Screening Cost
14/01/2020	Donation	£13.05		£8,068.51	Donation
27/01/2020	Fee		£18.00	£8,050.51	Just Giving Fee
05/03/2020	Donation	£330.00		£8,380.51	Bank Deposit
07/03/2020	Donation	£60.00		£8,440.51	Bank Deposit
12/03/2020	Donation	£694.75		£9,135.26	Bank Deposit
16/03/2020	Donation	£30.82		£9,166.08	Bank Deposit
23/03/2020	Donation	£22.55		£9,188.63	Bank Deposit
25/03/2020	Invoice Fee		£18.00	£9,170.63	Just Giving Fee
09/04/2020	Donation	£1,325.35		£10,495.98	Bank Deposit
27/04/2020	Invoice Fee		£18.00	£10,477.98	Just Giving Fee
04/05/2020	Donation	£14.51		£10,492.49	Bank Deposit
06/05/2020	Donation	£204.00		£10,696.49	Bank Deposit
19/05/2020	Donation	£68.67		£10,765.16	Bank Deposit
21/05/2020	Donation	£6.14		£10,771.30	Bank Deposit
21/05/2020	Donation	£135.00		£10,906.30	Bank Deposit
26/05/2020	Invoice Fee		£18.00	£10,888.30	Just Giving Fee
26/05/2020	Donation	£3.56		£10,891.86	Bank Deposit
02/06/2020	Donation	£17.46		£10,909.32	Bank Deposit
04/06/2020	Donation	£16.62		£10,925.94	Bank Deposit
04/06/2020	Donation	£374.00		£11,299.94	Bank Deposit
08/06/2020	Donation	£97.90		£11,397.84	Bank Deposit
10/06/2020	Donation	£300.00		£11,697.84	Bank Deposit
16/06/2020	Donation	£4.27		£11,702.11	Bank Deposit
18/06/2020	Donation	£130.00		£11,832.11	Bank Deposit
19/06/2020	Donation	£23.75		£11,855.86	Cash
25/06/2020	Invoice Fee		£18.00	£11,837.86	Just Giving Fee
27/07/2020	Invoice Fee		£18.00	£11,819.86	Just Giving Fee
02/08/2020	Donation	£100.00		£11,919.86	Cash
13/08/2020	Donation	£8.40		£11,928.26	Bank Deposit
25/08/2020	Invoice Fee		£18.00	£11,910.26	Just Giving Fee
26/09/2020	Invoice Fee		£18.00	£11,892.26	Just Giving Fee
25/09/2020	Donation	£19.42		£11,911.68	Bank Deposit
01/10/2020	CLOSING BALANCE	£21,122.76	£25,198.00	£11,911.68	