

The Adam Lewis Effect Foundation - #TALE

Trustee's Report 2nd October 2021 – 1st October 2022



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 4%. 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 97% of our spend has been on funding Heart Screening, with the remaining less than 3% 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, Leigh East ARLFC, the Parish of Holmes Chapel, Asda, David Lloyd, PS2 Digital, Burtonwood Community Centre, Swagelock, Solvay Interlox, M&S Warrington and a new alliance with Venturi Cardiology, a private heart clinic in Warrington. We have also benefited from establishing our Amazon Smile and Facebook Giving donation services. All of these organisations have made donations, enquired about or held screening and supported our cause in some way.

We have recovered well after the COVID-19 pandemic and the effect it had on our fundraising targets and screening abilities throughout 2021 and 2022, however we are fortunate that as our operating costs are so low, we were able to continue to trade. We are also fortunate that our pre-booked and pre-paid for Heart Screening events were postponed and no invested funds have been lost, so screening events carried out in 2021/2022 were funded by carried-over funds from last year.

Donations & Fundraising

We have received many generous donations, plus our affiliations with Amazon Smile and Facebook Giving have yielded disbursements. In total we have raised £11,836 in donations and Fundraising Activity, which was added to our starting balance of £9,370.

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. NB – it is worth noting that all of these days were funded in the previous year and carried over once Pandemic restrictions allowed for Heart Screening events to recommence.

- Heart screening events carried out:
 - 27.11.21 (Orford Jubilee Hub, Warrington)
 - 28.11.21 (Orford Jubilee Hub, Warrington)
 - 12.02.22 (Holmes Chapel Comprehensive)
 - 13.02.22 (Holmes Chapel Comprehensive)
 - 16.08.22 (Burtonwood Community Centre)
 - 17.08.22 (Burtonwood Community Centre)

Investments

We continue to operate with maximum efficiency, dedicated to spending as much of our raised funds on Heart Screening as possible. This year, we invested around 20% of our raised funds back into fundraising activity and operational costs, meaning that 80p of every £1 raised will be spent on proving Heart Screening events within our community.

- Catering for a Fundraising event - £2140
- Stationary costs - £20
- Just Giving Subscriptions - £198

Accounts Summary

Opening Balance	£9,370.00
Total Received	£11,836.00
Total Spend	£2,418.00
Closing Balance	£18,788.00

Future Plans

We have a number of future plans, including:

- Funding of Heart Screening Days
 - 6 currently booked in for 2022/2023
- The launch of our Website is still pending
 - Including our web-store, selling apparel, wrist bands, car stickers etc.
- The Afternoon Tea Initiative
 - We look forward to re-starting this initiative in 2022/2023 when social distancing measures have been lifted.
- Continuation of Fundraising
 - We continue to drive fundraising through local business donations, fundraising events, Community donations, Facebook Giving, Just Giving and Amazon Smile.

Summary

We are really proud to have built on the great work done in our fourth year to raise funds to have now benefited over 3300 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. We have some work to do to continue re-building towards our annual fundraising target of £25,000 per year now that the sector has opened up again in the wake of the pandemic.

THE ADAM LEWIS EFFECT FOUNDATION CIO ANNUAL ACCOUNTS 02.10.21 - 01.10.22

DATE	TRANSACTION	INCOMING	OUTGOING		WHAT?
STARTING BALANCE				£9,370.00	
05/10/2021	Donation	£236.53		£9,606.53	Just Giving
13/10/2021	Donation	£59.33		£9,665.86	Just Giving
19/10/2021	Donation	£500.00		£10,165.86	Donation
20/10/2021	Donation	£2.37		£10,168.23	Just Giving
22/10/2021	Donation	£50.00		£10,218.23	Donation
25/10/2021	Invoice		£18.00	£10,200.23	Just Giving Fee
26/10/2021	Donation	£53.35		£10,253.58	Fundraising Activity
29/10/2021	Donation	£760.00		£11,013.58	Just Giving
02/11/2021	Donation	£20.00		£11,033.58	Just Giving
03/11/2021	Donation	£100.00		£11,133.58	Just Giving
10/11/2021	Donation	£9.50		£11,143.08	Just Giving
14/11/2021	Donation	£107.00		£11,250.08	Donation
15/11/2021	Donation	£13.00		£11,263.08	Donation
15/11/2021	Donation	£120.00		£11,383.08	Fundraising Activity
16/11/2021	Invoice		£18.00	£11,365.08	Just Giving Fee
02/12/2021	Donation	£300.00		£11,665.08	Donation
06/12/2021	Donation	£107.11		£11,772.19	Just Giving
10/12/2021	Donation	£60.00		£11,832.19	Fundraising Activity
11/12/2021	Donation	£300.00		£12,132.19	Fundraising Activity
13/12/2021	Donation	£45.18		£12,177.37	Amazon Smile Donation
14/12/2021	Donation	£200.00		£12,377.37	Donation
14/12/2021	Donation	£30.00		£12,407.37	Fundraising Activity
15/12/2021	Donation	£26.11		£12,433.48	Just Giving
17/12/2021	Donation	£180.00		£12,613.48	Fundraising Activity
22/12/2021	Donation	£335.00		£12,948.48	Facebook Giving
24/12/2021	Donation	£48.85		£12,997.33	Just Giving
27/12/2021	Donation	£192.00		£13,189.33	Fundraising Activity
29/12/2021	Invoice		£18.00	£13,171.33	Just Giving Fee
01/01/2021	Donation	£180.00		£13,351.33	Fundraising Activity
01/01/2021	Donation	£180.00		£13,531.33	Fundraising Activity
05/01/2022	Donation	£14.24		£13,545.57	Just Giving
05/01/2022	Donation	£30.00		£13,575.57	Fundraising Activity
07/01/2022	Donation	£60.00		£13,635.57	Fundraising Activity
08/01/2022	Donation	£60.00		£13,695.57	Fundraising Activity
09/01/2022	Donation	£75.00		£13,770.57	Fundraising Activity
10/01/2022	Donation	£192.00		£13,962.57	Donation
11/01/2022	Invoice		£2,140.00	£11,822.57	Fundraising Activity (Catering)
12/01/2022	Invoice		£18.00	£11,804.57	Just Giving Fee
13/01/2022	Donation	£330.00		£12,134.57	Donation
14/01/2022	REFUND		£60.00	£12,074.57	Fundraising Activity
15/01/2022	Donation	£9.61		£12,084.18	Just Giving

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16/02/2022	Donation	£2.32		£12,086.50	Just Giving
21/02/2022	Donation	£196.00		£12,282.50	Donation
22/02/2022	Donation	£58.06		£12,340.56	Donation
22/02/2022	Donation	£2,059.00		£14,399.56	Fundraising Activity
23/02/2022	Donation	£60.34		£14,459.90	Amazon Smile Donation
25/02/2022	Invoice		£18.00	£14,441.90	Just Giving Fee
04/03/2022	Donation	£500.00		£14,941.90	Donation
07/03/2022	Donation	£353.00		£15,294.90	Facebook Giving
06/03/2022	Donation	£9.49		£15,304.39	Just Giving
11/03/2022	Admin		£20.20	£15,284.19	Stationary
22/03/2022	Donation	£2.73		£15,286.92	Just Giving
25/03/2022	Invoice		£18.00	£15,268.92	Just Giving Fee
04/04/2022	Donation	£9.61		£15,278.53	Just Giving
11/04/2022	Donation	£393.10		£15,671.63	Just Giving
19/04/2022	Donation	£131.00		£15,802.63	Just Giving
25/04/2022	Invoice		£18.00	£15,784.63	Just Giving Fee
26/04/2022	Donation	£1,053.75		£16,838.38	Just Giving
27/04/2022	Donation	£99.71		£16,938.09	Just Giving
03/05/2022	Donation	£231.44		£17,169.53	Just Giving
04/05/2022	Donation	£19.22		£17,188.75	Just Giving
09/05/2022	Donation	£49.99		£17,238.74	Amazon Smile
11/05/2022	Donation	£7.12		£17,245.86	Just Giving
17/05/2022	Donation	£96.90		£17,342.76	Just Giving
18/05/2022	Donation	£14.23		£17,356.99	Just Giving
25/05/2022	Invoice		£18.00	£17,338.99	Just Giving Fee
25/05/2022	Donation	£2.32		£17,341.31	Just Giving
22/06/2022	Invoice		£18.00	£17,323.31	Just Giving Fee
08/07/2022	Donation	£90.00		£17,413.31	Donation
19/07/2022	Donation	£210.00		£17,623.31	Facebook Giving
10/08/2022	Donation	£300.00		£17,923.31	Donation
10/08/2022	Donation	£3.57		£17,926.88	Just Giving
16/08/2022	Donation	£38.70		£17,965.58	Amazon Smile Donation
25/08/2022	Invoice		£18.00	£17,947.58	Just Giving Fee
30/08/2002	Donation	£327.82		£18,275.40	Just Giving
31/08/2022	Donation	£53.66		£18,329.06	Just Giving
03/09/2022	Donation	£475.00		£18,804.06	Donation
07/09/2022	Donation	£2.37		£18,806.43	Just Giving
26/09/2022	Invoice		£18.00	£18,788.43	Just Giving Fee
01/10/2022	CLOSING BALANCE	£11,836.63	£2,418.20	£18,788.43	