

The Adam Lewis Effect Foundation - #TALE

Trustee's Report 2nd October 2022 – 1st October 2023



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. 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. However, economic pressures have meant that the cost of screening events has now increased, meaning that we need to raise more funds in order to provide the same level of support. During this financial period, over 98% of our spend has been on funding Heart Screening, with the remaining less than 2% of our spend being on our Just Giving subscription and some small investments made in setting up fundraising events.

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 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.

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 £16,438 in donations and Fundraising Activity, which was added to our starting balance of £18,788. This is also a 45% increase in fundraising from the previous year, demonstrating a good recovery from 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-£65 per head. This year we donated a total of £20,000 to the Memorial Fund. Heart screening events carried out:

- 19.11.22 (Leigh East ARLFC)
- 20.11.22 (Leigh East ARLFC)

Of the £20,000 paid to Cardiac Risk in the Young this year, £10,000 is to secure heart screening days in the next financial year.

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 2% of our raised funds back into fundraising activity and operational costs, meaning that over 98p of every £1 raised will be spent on providing Heart Screening events within our community.

- Catering for a Fundraising event - £94.80
- Just Giving Subscriptions - £180

Accounts Summary

Opening Balance	£18,788.00
Total Received	£16,438.00
Total Spend	£20,274.00
Closing Balance	£14,952.00

Future Plans

We have a number of future plans, including:

- Funding of Heart Screening Days
 - 4 currently booked in for 2023/2024
- The launch of our Website is still pending
 - Including our web-store, selling apparel, wrist bands, car stickers etc.
- The Afternoon Tea Initiative
 - We plan to continue this initiative in 2023/2024.
- Continuation of Fundraising
 - We continue to drive fundraising through local business donations, fundraising events, Community donations, Facebook Giving, Just Giving and Amazon Smile.
 - We plan to apply for TNL Awards for All and Virgin Unite in 2023/2024 to support our fundraising for screening efforts.

Summary

We are really proud to have built on the great work done in our fifth year to raise funds to have now benefited over 3500 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 02.10.22 - 01.10.23

DATE	TRANSACTION	INCOMING	OUTGOING		WHAT?
STARTING BALANCE				18,788.43	
09/10/2022	Donation	90.00		18,878.43	Bank Credit
10/10/2022	Donation	90.00		18,968.43	Bank Credit
25/10/2022	Invoice		18.00	18,950.43	Just Giving
11/11/2022	Donation	6,600.00		25,550.43	Bank Credit
15/11/2022	Invoice		20,000.00	5,550.43	CRY
15/11/2022	Donation	47.05		5,597.48	Bank Credit
25/11/2022	Invoice		18.00	5,579.48	Just Giving
25/11/2022	Donation	117.32		5,696.80	Just Giving
06/12/2022	Donation	28.50		5,725.30	Just Giving
13/12/2022	Fundraiser	2,250.00		7,975.30	Bank Credit
14/12/2022	Donation	3.56		7,978.86	Just Giving
19/12/2022	Donation	58.25		8,037.11	Just Giving
28/12/2022	Invoice		18.00	8,019.11	Just Giving
09/01/2023	Donation	200.00		8,219.11	Just Giving
10/01/2023	Donation	5.94		8,225.05	Just Giving
25/01/2023	Invoice		18.00	8,207.05	Just Giving
12/01/2023	Donation	48.85		8,255.90	Just Giving
30/01/2023	Donation	67.75		8,323.65	Bank Credit
31/01/2023	Donation	60.00		8,383.65	Just Giving
01/02/2023	Donation	60.00		8,443.65	Just Giving
01/02/2023	Donation	180.00		8,623.65	Just Giving
01/02/2023	Donation	120.00		8,743.65	Just Giving
02/02/2023	Donation	270.00		9,013.65	Bank Credit
03/03/2023	Invoice		60.00	8,953.65	Bank Debit
08/03/2023	Fundraiser	2,450.00		11,403.65	Bank Credit
09/03/2023	Donation	20.00		11,423.65	Bank Credit
10/03/2023	Donation	120.00		11,543.65	Bank Credit
11/03/2023	Donation	60.00		11,603.65	Bank Credit
27/03/2023	Donation		18.00	11,585.65	Bank Debit
10/04/2023	Donation	50.00		11,635.65	Bank Credit
24/04/2023	Donation	30.81		11,666.46	Bank Credit
25/04/2023	Invoice		18.00	11,648.46	Bank Debit
19/05/2023	Donation	105.15		11,753.61	Bank Credit
25/05/2023	Donation	1,020.22		12,773.83	Bank Credit
21/05/2023	Invoice		18.00	12,755.83	Bank Debit
06/06/2023	Donation	180.00		12,935.83	Bank Credit
16/06/2023	Donation	450.00		13,385.83	Bank Credit
26/06/2023	Invoice		18.00	13,367.83	Bank Debit
03/07/2023	Donation	19.42		13,387.25	Just Giving
05/07/2023	Donation	4.75		13,392.00	Just Giving
07/07/2023	Fundraiser	175.00		13,567.00	Bank Credit
08/07/2023	Fundraiser	30.00		13,597.00	Bank Credit
31/07/2023	Fundraiser	105.00		13,702.00	Bank Credit
03/08/2023	Invoice		34.80	13,667.20	Bank Debit
08/08/2023	Fundraiser	955.00		14,622.20	Bank Credit
15/08/2023	Donation	18.78		14,640.98	Just Giving
16/08/2023	Donation	7.12		14,648.10	Just Giving
22/08/2023	Donation	4.74		14,652.84	Just Giving
25/08/2023	Donation		18.00	14,634.84	Bank Debit
30/08/2023	Donation	190.00		14,824.84	Bank Credit
04/09/2024	Donation	48.25		14,873.09	Just Giving
12/09/2024	Donation	9.50		14,882.59	Just Giving
25/09/2024	Invoice		18.00	14,864.59	Bank Debit
25/09/2024	Donation	87.49		14,952.08	Just Giving
01/10/2024	CLOSING BALANCE	16,438.45	20,274.80	14,952.08	