

The Adam Lewis Effect Foundation - #TALE

Trustee's Report 2nd October 2023 – 1st October 2024



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 91% of our spend has been on funding Heart Screening, with the remaining less than 9% of our spend being on our Just Giving subscription and some small investments made in setting up fundraising events.

The cost of screening events has increased exponentially over the last few years. Originally charged at £3500, the cost has gradually doubled – each event now costs us £7000.

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.

This period we have also benefited from a National Lottery Awards for All grant of £19,500, which will fund 3 heart screening events in the next period (Oct '24 – Oct '25).

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 £22,959 in donations, Fundraising Activity and Grants, which was added to our starting balance of £14,952. This is also a 39% increase in fundraising from the previous year, demonstrating steady growth.

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 £65 - £70 per head. This year we donated a total of £29,500 to the Memorial Fund.

Heart screening events carried out:

- 16.03.24 (Burtonwood Community Centre)
- 17.03.24 (Burtonwood Community Centre)
- 29.06.24 (Great Sankey Neighbourhood Hub)
- 30.06.24 (Great Sankey Neighbourhood Hub)

All funding paid to Cardiac Risk in the Young this year is to secure heart screening days in the next financial year, of which 4 events have been booked.

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 8.6% of our raised funds back into fundraising activity and operational costs, meaning that over 91p of every £1 raised will be spent on proving Heart Screening events within our community.

- Catering for a Fundraising event - £2,625.00
- Just Giving Subscriptions - £162

Accounts Summary

Opening Balance	£14,952.00
Total Received	£22,959.00
Total Spend	£32,288.00
Closing Balance	£5,623.00

Future Plans

We have a number of future plans, including:

- Funding of Heart Screening Days
 - 4 currently booked in for 2024/2025
- 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 a further TNL Awards for All in 2026 and Virgin Unite in 2026 to support our fundraising for screening efforts.

Summary

We are really proud to have built on the great work done in our seventh year to raise funds to have now benefited over 4000 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 continue re-building towards our annual fundraising target of £28,000 per year so that we may continue to offer a minimum of 4 screening events per year.

Month	Date	Source	Income	Expend	Balance	Information
			14,952			
Oct-23	04/10/2023	Donation	11.87		14,964	Just Giving
	16/10/2023	Event FR	656.65		15,621	Garden Party
	23/10/2023	Donation	249.91		15,870	Just Giving
	24/10/2023	Donation	51.88		15,922	Face Book
	25/10/2023	Invoice/Fee		18	15,904	Just Giving
	25/10/2023	Donation	37.98		15,942	Just Giving
Nov-23	01/11/2023	Donation	51.51		15,994	Just Giving
Dec-23	04/12/2023	Donation	19.42		16,013	Just Giving
	06/12/2023	Donation	1,000		17,013	Burtonwood Beer Fest
	11/12/2023	Donation	5,000		22,013	Keith Stocker
	12/12/2023	Donation	4.75		22,018	Just Giving
	12/12/2023	Donation	5		22,023	K Lewis
	13/12/2023	Donation	235		22,258	Penketh Panthers
	14/12/2023	Donation	2		22,260	Evalon
	15/12/2023	Donation	50		22,310	Penketh Panthers
	27/12/2023	Invoice/Fee		18	22,292	Just Giving
	27/12/2023	Donation	19.42		22,311	Just Giving
Jan-24	09/01/2024	Donation	4.75		22,316	Just Giving
	18/01/2024	Invoice/Fee		0.04	22,316	Avalon
	19/01/2024	tickets	175		22,491	K Lewis
	20/01/2024	tickets	175		22,666	J Evans
	21/01/2024	tickets	350		23,016	P Carroll
	24/01/2024	tickets	70		23,086	G Hughes
	24/01/2024	tickets	175		23,261	K Lewis
	25/01/2024	Invoice/Fee		18	23,243	Just Giving
	26/01/2024	Tickets	35		23,278	G Boyd
	30/01/2024	Tickets	140		23,418	D Griffiths
	19/01/2024		20		23,438	Donation
Feb-24	02/02/2024	Payment	350		23,788	Ticket Sales
	05/02/2024	Payment	490		24,278	Ticket Sales
	06/02/2024	Donation	11.87		24,290	Just Giving
	07/02/2024	Donation	498.71		24,789	Just Giving
	24/02/2024	Payment	385		25,174	Ticket Sales
	27/02/2024	Donation	104.5		25,278	Just Giving
	28/02/2024	Invoice		2625	22,653	Balance for Cartering
Mar-24	04/03/2024	Donation	9.61		22,663	Just Giving
	07/03/2024	Donation	70		22,733	Just Giving
	11/03/2024	Donation	107.31		22,840	Just Giving
	12/03/2024	Donation	2.37		22,842	Just Giving
	13/03/2024	Donation	2038		24,880	Burtonwood Event
	19/03/2024	Donation	37.99		24,918	Just Giving
	20/03/2024	Screening Cost		10000	14,918	CRY
	25/03/2024	Raffle	400		15,318	Raffle
	25/03/2024	Invoice/Fee		18	15,300	Just Giving
	26/03/2024	Donation	131.43		15,432	Just Giving

	26/03/2024	Fund Raiser	685		16,117	Raffle
Apr-24	02/04/2024	Donation	19.42		16,136	Just Giving
	02/04/2024	Donation	20.18		16,156	Just Giving
	10/04/2024	Donation	4.75		16,161	Just Giving
	16/04/2024	Donation	68.27		16,230	Just Giving
	18/04/2024	Invoice/Fee		1.23	16,228	Avilon
	19/04/2024	Grant	19500		35,728	Lottery Funding
	20/04/2024	Donation	2540		38,268	Keith Stocker
	22/04/2024	Donation	68.27		38,337	Just Giving
	25/04/2024	Invoice/Fee		18	38,319	Just Giving
	25/04/2024	Screening Cost		10000	28,319	CRY
	26/04/2024	Screening Cost		9500	18,819	CRY
	30/04/2024	Donation	21.37		18,840	Just Giving
	30/04/2024	Donation	116.31		18,956	Just Giving
May-24	01/05/2024	Donation	24		18,980	Just Giving
	08/05/2024	Donation	13.06		18,993	Just Giving
	13/05/2024	Donation	386		19,379	Just Giving
	21/05/2024	Donation	93.81		19,473	Just Giving
	28/05/2024	Invoice/Fee		18	19,455	Just Giving
	29/05/2024	Donation	395.3		19,850	Just Giving
Jun-24	01/06/2024	Donation	115.17		19,965	Just Giving
	03/06/2024	Donation	97.3		20,063	Just Giving
Jul-24	03/07/2024	Donation	103.27		20,166	Just Giving
	08/07/2024	Donation	58.66		20,225	Just Giving
	10/07/2024	Donation	18.98		20,244	Just Giving
	16/07/2024	Donation	14.25		20,258	Just Giving
	25/07/2024	Invoice/Fee		18	20,240	Just Giving
	29/07/2024	Donation	92.79		20,333	Just Giving
Aug-24	06/08/2024	Donation	14.25		20,347	Just Giving
	27/08/2024	Invoice/Fee		18	20,329	Just Giving
Sep-24	13/09/2024	Donation	250		20,579	Masonic Lodge
	25/09/2024	Invoice/Fee		18	20,561	Just Giving
	06/08/2024	Donation	14.25		20,575	Just Giving
			37911.33	32288.27	5623.06	