

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales · Charity number 1170947

Details

Status Registered

Legal form CIO

Registered 2017-01-03

Register [View on the Charity Commission register](#)

Contact

Address Peters Research Ltd
Bridge House
Station Approach
Great Missenden
HP16 9AZ

Phone 01494 717821

Website <https://liftsymposium.org/>

Activities

Objects: TO ADVANCE EDUCATION IN LIFT AND ESCALATOR AND RELATED TECHNOLOGIES.

Activities: The objective of the The Lift and Escalator Symposium Educational Trust is to advance education in lifts and escalator and related technologies. The Trust brings together experts from the field of vertical transportation, offering opportunities for speakers to present peer reviewed papers on the subject of their research. Papers are published open-source on the Trust's web site.

Classification

- **How:** Makes Grants To Individuals, Provides Services, Provides Advocacy/advice/information, Sponsors Or Undertakes Research, Acts As An Umbrella Or Resource Body
- **What:** Education/training
- **Who:** The General Public/mankind

Geography

- China
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£15,452	£60	-	-
2023-12-31	£29,440	£60	-	-
2022-12-31	£1,005	£60	-	-
2021-12-31	£9,874	£340	-	-
2020-12-31	£1,042	£4,092	-	-

Trustees

Name	Role	Appointed
David Alan Cooper FCIBSE	Chair	2015-09-24
Dr Richard Peters		2015-09-24
NICHOLAS MELLOR		2015-09-24
PROF STEFAN KACZMARCZYK		2015-09-25

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales - Charity number 1170947

Accounts

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

TRUSTEES REPORT FOR 2024

The Trustees are pleased to report that the Charity continues to achieve its aim to advance education in lift and escalator and related technologies.

We were very pleased to achieve Charitable status with the Charity Commission in January 2017.

The Charity continues to enjoy a healthy relationship with the Lift & Escalator Industry Association (LEIA), University of Northampton (UoN) and the Chartered Institution of Building Services Engineers (CIBSE). The collaboration of these organisations assists in making the symposia internationally recognised as the highest quality provider of educational papers in the world.

It is anticipated that the relationship with the University of Northampton will fade away as they withdraw courses appropriate to our host industry and we are actively seeking relationships with alternatives.

Since inception we have held 15 very successful symposia. (Two have been online due to the COVID pandemic, 9 were held at Highgate House Conference Centre in Northampton over a two-day period and a further Symposium was held in Hong Kong during 2018). In 2022, with the loss of Highgate House as a venue we transferred to the Hilton Hotel, Northampton where we also held the 2023 event. In 2024 it was decided by the Trustees to move to the Kettering Park Hotel.

Our 2024 symposium was an in person event over two days. There were a wide range of presentations on lift and escalator technologies which were well received by the audience. Delegates came from all around the globe with many different countries represented.

It is our intention to hold another symposium in Kettering in 2025. This will be our 16th Symposium and a new venue has been sourced.

In order to promote education, the proceedings of the symposia are made available free of charge on our website. In addition, the lift and escalator industry global trade press supported our symposium with the promotion of the event, publication of a post event report and the publication of a number of the presented papers.

The Trust is delighted to report that a new UK based trade publication, Lift Industry News, was launched in 2022 and will be publishing papers from the symposium.

The Trust is also delighted to report that the lift & escalator online library, which was launched in 2021, has proved to be a success. This is a library where papers can be located for the purposes of research and/or subject matter interest.

On the basis of the forgoing the Trustees are delighted to report that the Charity continues to achieve its aims.

Financial Summary

The Charity's financial position remains stable, with reserves held for the purpose of sustaining future operations and events. The Trustees plan to use part of these reserves to enhance the accessibility of educational resources and to support attendance at conferences for those who cannot afford the fees.

Structure, Governance, and Management

The Lift and Escalator Symposium Educational Trust is constituted as a Charitable Incorporated Organisation (CIO). Trustees are selected in accordance with the constitution.

Reference and Administrative Details

- Charity name: The Lift and Escalator Symposium Educational Trust
- Registered charity number: 1170947
- Principal address: Bridge House, Station Approach, Great Missenden, HP16 9AZ

Trustees

Names of the charity trustees who managed the charity during the year:

1. David Cooper (Chairman)
2. Stefan Kaczmarczyk
3. Nicholas Mellor (Treasurer)
4. Richard Peters

Declaration

The trustees declare that they have approved the trustees' report above.

David Cooper
Chairman

21st October 2025

LIFT & ESCALATOR SYMPOSIUM TRUST

FINANCIAL YEAR ENDED 31 December 2024

INCOME	
Donations	£15,451.69
(not used)	£0.00
(not used)	£0.00
Total	£15,451.69
 EXPENDITURE	
Banking	£60.00
(not used)	£0.00
(not used)	£0.00
(not used)	£0.00
Total	£60.00
 Income – expenditure	 £15,391.69
 Balance brought forward from previous year	 £43,910.41
 Balance carried forward	 £59,302.10

Notes

Peters Research acts as an events organiser for the Trust on a non-profit basis. The event surplus is donated to the Trust as recorded in these accounts.

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales - Charity number 1170947

Accounts

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

TRUSTEES REPORT FOR 2023

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The Charity continues to enjoy a healthy relationship with the Lift & Escalator Industry Association (LEIA), University of Northampton (UoN) and the Chartered Institution of Building Services Engineers (CIBSE). The collaboration of these organisations assists in making the symposia internationally recognised as the highest quality provider of educational papers in the world.

Since inception we have held 14 very successful symposia. (Two have been online due to the COVID pandemic, 9 were held at Highgate House Conference Centre in Northampton over a two-day period and a further Symposium was held in Hong Kong during 2018). In 2022, with the loss of Highgate House as a venue we transferred to the Hilton Hotel, Northampton where we also held the 2023 event.

Our 2023 symposium was an in person event over two days. There were a wide range of presentations on lift and escalator technologies which were well received by the audience. Delegates came from all around the globe with many different countries represented.

It is our intention to hold another symposium in Kettering in 2024. This will be our 15th Symposium and a new venue has been sourced.

In order to promote education, the proceedings of the symposia are made available free of charge on our website. In addition, the lift and escalator industry global trade press supported our symposium with the promotion of the event, publication of a post event report and the publication of a number of the presented papers.

The Trust is delighted to report that a new UK based trade publication, Lift Industry News, was launched in 2022 and will be publishing papers from the symposium.

The Trust is also delighted to report that the lift & escalator online library, which was launched in 2021, has proved to be a success. This is a library where papers can be located for the purposes of research and/or subject matter interest.

On the basis of the forgoing the Trustees are delighted to report that the Charity continues to achieve its aims.

Financial Summary

The Charity's financial position remains stable, with reserves held for the purpose of sustaining future operations and events. The Trustees plan to use part of these reserves to enhance the accessibility of educational resources and to support attendance at conferences for those who cannot afford the fees.

Structure, Governance, and Management

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Reference and Administrative Details

- Charity name: The Lift and Escalator Symposium Educational Trust
- Registered charity number: 1170947
- Principal address: Bridge House, Station Approach, Great Missenden, HP16 9AZ

Trustees

Names of the charity trustees who managed the charity during the year:

1. David Cooper (Chairman)
2. Stefan Kaczmarczyk
3. Nicholas Mellor (Treasurer)
4. Richard Peters

Declaration

The trustees declare that they have approved the trustees' report above.

David Cooper
Chairman

12th March 2024

LIFT & ESCALATOR SYMPOSIUM TRUST

FINANCIAL YEAR ENDED 31 December 2023

INCOME

Donations	£29,440.42
(not used)	£0.00
(not used)	£0.00
Total	£29,440.42

EXPENDITURE

Banking	£60.00
(not used)	£0.00
(not used)	£0.00
(not used)	£0.00
Total	£60.00

Income – expenditure	£29,380.42
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Balance brought forward from previous year	£14,529.99
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Balance carried forward	£43,910.41
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Notes

Peters Research acts as an events organiser for the Trust on a non-profit basis. The event surplus is donated to the Trust as recorded in these accounts. This year's accounts includes a refund from JW Marriot (£8021.05) corresponding to deposit refund arising from a cancelled event during the COVID pandemic.

**The financial statements were approved by the Board of Trustees on 31 October 2024
and were signed on its behalf by**

Nicholas Mellor

Treasurer

TRANSACTIONS

Date	Description	Debit	Credit	Balance	Expenditure Category	Income Category
Carry forward				14529.99		
03/01/23	PETERS RESEA JW Marriot Refund		8021.05	22551.04	N/A	Donations
24/01/23	TOTAL CHARGES	5		22546.04	Banking	N/A
06/02/23	Peters Richard Donation		5	22551.04	N/A	Donations
24/02/23	TOTAL CHARGES	5		22546.04	Banking	Donations
27/02/23	PETERS RESEARCH 2022		3185.38	25731.42	N/A	Donations
03/03/23	TOTAL CHARGES	5		25726.42	Banking	N/A
03/04/23	TOTAL CHARGES	5		25721.42	Banking	N/A
03/05/23	TOTAL CHARGES	5		25716.42	Banking	N/A
24/06/23	TOTAL CHARGES	5		25711.42	Banking	N/A
24/07/22	TOTAL CHARGES	5		25706.42	Banking	N/A
07/08/23	Peters Richard Donation		5	25711.42	N/A	Donations
24/08/23	TOTAL CHARGES	5		25706.42	Banking	N/A
14/09/24	PETERS RESEARCH Donation		1000	26706.42	N/A	Donations
24/09/23	TOTAL CHARGES	5		26701.42	Banking	N/A
24/10/23	TOTAL CHARGES	5		26696.42	Banking	N/A
21/11/23	PETERS RESEARCH Donation		17223.99	43920.41	N/A	Donations
24/11/23	TOTAL CHARGES	5		43915.41	Banking	N/A
24/12/23	TOTAL CHARGES	5		43910.41	Banking	N/A
				43910.41	N/A	N/A
	Totals	60	29440.42			

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

I report to the trustees on my examination of the accounts for the above charity for the year ended 31 December 2023.

Respective responsibilities of trustees and examiner

The charity's trustees are responsible for the preparation of the accounts. The charity's trustees consider that an audit is not required for this year (under Section 144(2) of the Charities Act 2011 (the 2011 Act)) and that an independent examination is required.

It is my responsibility to:

- examine the accounts under Section 145 of the 2011 Act
- to follow the procedures laid down in the General Directions given by the Charity Commission (under Section 145(5)(b) of the 2011 Act); and
- to state whether particular matters have come to my attention.

Basis of the independent examiner's report

My examination was carried out in accordance with the General Directions given by the Charity Commission. An examination includes a review of the accounting records kept by the charity and a comparison of the accounts presented with those records. It also includes consideration of any unusual items or disclosures in the accounts, and seeking explanations from you as trustees concerning any such matters. The procedures undertaken do not provide all the evidence that would be required in an audit, and consequently no opinion is given as to whether the accounts present a 'true and fair view' and the report is limited to those matters set out in the statements below.

Independent examiner's statement

In connection with my examination, no matter has come to my attention:

- (1) which gives me reasonable cause to believe that, in any material respect, the requirements:
 - to keep accounting records in accordance with Section 130 of the 2011 Act; and
 - to prepare accounts which accord with the accounting records and to comply with the accounting requirements of the 2011 Acthave not been met; or
- (2) to which, in my opinion, attention should be drawn in order to enable a proper understanding of the accounts to be reached.

Mrs Karen Jones
The Oakes
Hare Lane
Little Kingshill
Buckinghamshire
HP16 OEF



7 November 2024

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales - Charity number 1170947

Accounts

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

TRUSTEES REPORT FOR 2022

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We were very pleased to achieve Charitable status with the Charity Commission in January 2017.

The Charity continues to enjoy a healthy relationship with the Lift & Escalator Industry Association (LEIA), University of Northampton (UoN) and the Chartered Institution of Building Services Engineers (CIBSE). The collaboration of these organisations assists in making the symposia internationally recognised as the highest quality provider of educational papers in the world.

Since inception we have held 13 very successful symposia. (Two have been online due to the COVID pandemic, 9 were held at Highgate House Conference Centre in Northampton over a two-day period and a further Symposium was held in Hong Kong during 2018). In 2022, with the loss of Highgate House as a venue we transferred to the Hilton Hotel, Northampton.

Our 2022 symposium was a hybrid in person and online event over two days. There were a wide range of presentations on lift and escalator technologies which were well received by the audience. Delegates came from all around the globe with many different countries represented.

Due to continuing COVID restrictions the Trustees concluded that it was appropriate to cancel the intended symposium in China which had already been delayed by a year.

It is our intention to hold another symposium in Northampton in 2023. This will be our 14th Symposium and due to the success of the 2022 event it was decided to remain at the Hilton Hotel, Northampton.

In order to promote education, the proceedings of the symposia are made available free of charge on our website. In addition, the lift and escalator industry global trade press supported our symposium with the promotion of the event, publication of a post event report and the publication of a number of the presented papers.

The Trust is delighted to report that a new UK based trade publication, Lift Industry News, was launched in 2022 and will be publishing papers from the symposium.

The Trust is also delighted to report that the lift & escalator online library, which was launched in 2021, has proved to be a success. This is a library where papers can be located for the purposes of research and/or subject matter interest.

On the basis of the forgoing the Trustees are delighted to report that the Charity continues to achieve its aims.

David Cooper
Chairman

4th April 2023

Lift & Escalator Symposium Educational Trust 2022 Accounts

Date		Income £	Expenditure £	Balance £
1 January 2022	Balance carried forward			13,584.99
24 January 2022	HSBC Monthly Fee		5.00	13,579.99
24 February 2022	HSBC Monthly Fee		5.00	13,574.99
24 March 2022	HSBC Monthly Fee		5.00	13,569.99
24 April 2022	HSBC Monthly Fee		5.00	13,564.99
24 May 2022	HSBC Monthly Fee		5.00	13,559.99
24 June 2022	HSBC Monthly Fee		5.00	13,554.99
24 Jul 2022	HSBC Monthly Fee		5.00	13,549.99
08 August 2022	R Peters Donation	5.00		13,554.99
24 August 2022	HSBC Monthly Fee		5.00	13,549.99
24 September 2022	HSBC Monthly Fee		5.00	13,544.99
24 October 2022	HSBC Monthly Fee		5.00	13,539.99

27 October 2022	Lift & Escalator Industry Association	1,000.00		14,539.99
24 November 2022	HSBC Monthly Fee		5.00	14,534.99
24 December 2022	HSBC Monthly Fee		5.00	14,529.99
Balance as at 31 December 2022				14,529.99

Nick Mellor
(Treasurer)

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales - Charity number 1170947

Accounts

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

TRUSTEES REPORT FOR 2021

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The Charity continues to enjoy a healthy relationship with the Lift & Escalator Industry Association (LEIA), University of Northampton (UoN) and the Chartered Institution of Building Services Engineers (CIBSE). The collaboration of these organisations assists in making the symposia internationally recognised as the highest quality provider of educational papers in the world.

Since inception we have held 12 very successful symposia. (Two have been online, 9 were held at Highgate House Conference Centre, Northampton over a two-day period and a further Symposium was held in Hong Kong during 2018).

Our 2021 symposium was held online over two days as COVID had affected the globe significantly and various restrictions on travel, social distancing, sizes of gatherings and so on meant that we could not meet face to face. This was compounded by the loss of our usual venue which had succumbed to financial pressure as a result of the pandemic. The Trustees took the decision not to let this affect our offering and despite the difficult situation the symposium was very successful and attracted eminent key note speakers from overseas. Unlike the 2020 symposium the Trustees decided to operate on a subscription basis rather than the donation based methodology applied in 2020.

There were a wide range of presentations on lift and escalator technologies including panel discussions on the themes of safety and modernisation.

Delegates came from all around the globe with many different countries represented.

Our report of 2020 stated that the next Symposium on Lift and Escalator Technologies would be held again in Northampton in September 2021 (Subject to COVID restrictions) and that we hoped to hold an event again in China in 2022. As previously stated the Northampton event was held online and the Trustees have subsequently agreed that the China event will be postponed until further notice.

It is our intention to hold another symposium in Northampton in 2022 but for reasons previously described we will have to find a new venue for this. The Trustees are working hard to identify a suitable venue.

In order to promote education, the proceedings of the symposia are made available free of charge on our website. In addition, the lift and escalator industry global trade press supported

our symposium with the promotion of the event, publication of a post event report and the publication of a number of the presented papers.

The Trust are delighted to report that the lift & escalator online library was launched during the year where papers can be located for the purposes of research and/or subject matter interest.

On the basis of the forgoing the Trustees are delighted to report that the Charity continues to achieve its aims.

David Cooper
Chairman

4th November 2021

Lift & Escalator Symposium Educational Trust 2021 Accounts

Date		Income £	Expenditure £	Balance £
1 January 2021	Balance carried forward			4,050.85
29 January 2021	Donation from Classic Lifts	500.00		4,550.85
02 February 2021	Donation from Michael Bottomley	50.00		4,600.85
03 February 2021	Donations via GoFundMe	117.06		4,717.91
22 February 2021	Donation from Ascent Lift Consultancy	50.00		4,767.91
25 February 2021	Donation from LEIA	10.00		4,777.91
01 March 2021	Donation from CIBSE Lifts Group	1,000.00		5,777.91
10 March 2021	Donation from LEIA	2,990.00		8,767.91
24 March 2021	Donations via GoFundMe	1,731.95		10,499.86
04 May 2021	PayPal Test Payment	0.01		10,499.87
21 May 2021	Donations via GoFundMe	125.40		10,625.27
30 September 2021	Eventbrite Registration Income – Day 1	1,625.00		12,250.27

	Eventbrite Fees & Taxes Day 1		165.10	12,085.17
01 October 2021	Eventbrite Registration Income – Day 2	1,675.00		13,760.17
	Eventbrite Fees & Taxes Day 2		170.18	13,589.99
24 December 2021	HSBC Monthly Fee		5.00	13,584.99
Balance as at 31 December 2021				13,584.99



Nick Mellor
(Treasurer)

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST

England & Wales - Charity number 1170947

Accounts

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

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Prior to achieving Charitable status, there were nine very successful symposia at the University of Northampton and Highgate House Conference Centre, Northampton over a two-day period. There was a further Symposium in Hong Kong during 2018.

Our 2020 symposium was very different. COVID had affected the globe significantly and various restrictions on travel, social distancing, sizes of gatherings and so on meant that we could not meet face to face. The Trustees took the decision not to let this affect our offering and we held it online over three days rather than two days to allow people to concentrate better. In addition, we took the decision that it should be a donation-based event rather than subscription based. There were a wide range of presentations on lift and escalator technologies including a panel discussion on how COVID had affected our industry,

Delegates joined from all around the globe with many different countries represented and over 300 in the audience. The Symposium is normally also supported by a small exhibition from the industry including components suppliers, control panel manufacturers and the University of Northampton itself and this year we continued with that by having advertising presentations between sessions. In normal (non COVID) times the small exhibition allows the Charity to minimise financial risk in the planning stages of the symposia and also assist in keeping delegate costs to a minimum as well as allowing us to fund students who would otherwise be unable to attend.

The 12th Symposium on Lift and Escalator Technologies will be held again in Northampton in September 2021 (Subject to COVID restrictions) and we hope to hold an event again in China in 2022.

In order to promote education, the proceedings of the symposia are made available free of charge on our website. In addition, the lift and escalator industry global trade press supported our symposium with the promotion of the event, publication of a post event report and the publication of a number of the presented papers.

On the basis of the forgoing the Trustees are delighted to report that the Charity continues to achieve its aims.

David Cooper
Chairman

11th January 2021

Lift & Escalator Symposium Educational Trust 2020 Accounts

Date		Income £	Expenditure £	Balance £
1 January 2020	Balance carried forward			7,100.79
2 July 2020	Highgate House Hotel – Cancellation Fee re 2020 Symposium		2,592.00	4,508.79
26 October 2020	Emma MackLey – fees for social media campaign for 2020 Symposium		1,500.00	3,008.79
20 November 2020	Donations from Just Giving	1,042.06		4,050.85
Balance as at 31 December 2020				4,050.85



Nick Mellor
(Treasurer)