

THE LIFT AND ESCALATOR SYMPOSIUM EDUCATIONAL TRUST
Registered Charity 1170947

TRUSTEES REPORT FOR 2023

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.

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

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

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