

## **The Brun Bear Foundation Annual Report**

### **About The Brun Bear Foundation**

The Brun Bear Foundation is a unique charitable organisation born from a deeply personal story of love, memory, and community spirit. Founded in 2015 by Edwin Lampert, the Foundation was established in honour of his father, who, during his battle with brain cancer, imagined living with two kindly bears named Brunhilfer and Brunfin. After his father's passing in 2014, Edwin created the Foundation as a living tribute to his father's values and the causes he cherished: medical research, community projects in the London Boroughs of Bromley and Lewisham, and animal welfare---with a special emphasis on bears.

From its inception, The Brun Bear Foundation has harnessed the power of community to build better futures locally, globally, and in the natural world. Its first fundraising initiative was a series of children's books, written by Edwin, featuring the gentle adventures of Brunhilfer and Brunfin. These books, celebrated for their universal messages of inclusiveness and kindness, support the Foundation's work with every sale.

Over time, the Foundation has expanded its reach through a variety of creative and impactful initiatives. These include cultural and community events, supper clubs, scholarships, bursaries, and bold projects like MotherBear! - a celebration for mothers and families - and BAME Birthing With Colour, which addresses maternity issues affecting all communities including diverse and vulnerable ones.

Entirely volunteer-run, The Brun Bear Foundation has distributed thousands of pounds in grants to support medical research, community wellbeing, and animal welfare. Its mission remains rooted in the belief that by working together, we can create lasting positive change - and, in Edwin's words, perhaps help look after his father's bears too

### **Report and Financial Statements**

#### **Period Ended: 31 December 2024**

[Note: This report covers a 9-month period from 1 April 2024 to 31 December 2024 to align the charity's financial year with that of its subsidiary company.]

### **Reference and Administrative Details**

#### **Trustees:**

- Peter French, Chair of Trustees
- Edwin Lampert, Founder of The Brun Bear Foundation
- Dorothy Lampert, Treasurer
- Luke Ellis (resigned August 2024, transitioning to Technical and Strategic Advisor)

#### **Correspondence Address:**

Flat 5, Legion House, Old Bromley Road, Bromley, Kent BR1 4LB

#### **Charity Number:**

1174159

#### **Advisers:**

- Bankers: Metro Bank and United Trust Bank

- Technical and Strategic Advisor: Luke Ellis (appointed August 2024)

## **Structure, Governance and Management**

### **Legal Structure:**

The Brun Bear Foundation is a registered charity, number 1174159, constituted as a Charitable Incorporated Organisation (CIO), registered on 7 August 2017.

### **Governing Document and Purpose:**

The CIO was established by Edwin Lampert in memory of his father to honour his memory and values. The charity operates under a trust deed dated 30 March 2015, with the charity name "The Brun Bear Foundation" as specified in this governing document.

### **Trustee Selection Methods:**

New trustees are appointed by resolution of the trustees passed at a special meeting in accordance with Clause 9 of the trust deed. There must be at least two trustees, with every trustee (apart from the first trustees) appointed by resolution of the trustees passed at a special meeting. The trustees must consider skills, knowledge, and experience needed for effective administration when selecting new trustees. The Chair of Trustees is elected at the first ordinary meeting in the year, as specified in the governing document.

### **Governance:**

The charity retains a minimum of three trustees, exceeding the governing document requirement of a minimum of two and aligned with the Charity Commission's recommendations. All trustees contribute their time freely without remuneration as stipulated in the governing document.

As noted in the governing document, the first trustees were Edwin Lampert of Flat 5, Legion House, Old Bromley Road, Bromley, Kent BR1 4LB and Dorothy Lampert of 2, The Lanterns, 120B Avondale Road, Bromley, Kent BR1 4EY, holding the initial sum of £1,000 on the trusts declared in the deed.

Trustees meet monthly to review fundraising activities, grant applications, volunteer contributions, and to receive financial updates. No business shall be conducted at trustee meetings unless a quorum of at least one-third of the total number of trustees (or two trustees, whichever is greater) is present. Decisions are made by a majority vote of trustees present, with the Chair having a casting vote

### **Operations:**

In August 2024, Luke Ellis transitioned from Trustee to Technical and Strategic Advisor, creating a formal advisory role that better utilises his technology and strategic planning expertise while accommodating his time constraints. In this role he supports app development, advises on event registration strategies, and provides operational advice.

To aid in setting a budget and monitoring progress against that budget, the trustees have agreed to implement Notion for tracking Objectives and Key Results (OKRs) in 2025 and thereafter.

The importance of risk management is recognised by the trustees and a draft risk register, based on the template developed by the National Council for Voluntary Organisations (NCVO), has been circulated to the trustees, identifying the key risks faced by the charity. A

separate meeting has been planned for detailed discussion of the appropriate mitigation measures to be implemented.

The charity is dependent on, and grateful to, the volunteers who assist with the day-to-day operations and ongoing development of the underlying infrastructure which enables the charity to better serve the community. Volunteers have, for example, taken responsibility for the updating of the website and social media, assisted with the layout and illustration of books, and helped in the organisation and running of events.

### **Subsidiary Undertaking:**

The Foundation owns the entire issued ordinary share capital of Two Special Bears Trading Limited (company number 14828160), a company registered in England and Wales on 26 April 2023. The company enhances fundraising by providing a commercial outlet for book sales and event tickets, and initial financial support for book productions and events.

### **Objectives and Activities**

#### **Summary of Objects:**

The charity's objects, as set out in its governing document, are:

1. Relief of sickness and advancement of health research: To relieve the suffering of sick children and their families, and to advance health and save lives, in particular, by providing funds for research into childhood illnesses.
2. Animal welfare and conservation: To advance animal welfare including, in particular, relieving the suffering of, and preventing cruelty to, wild and captive bears.
3. Community development: To advance community development and, in particular, promote civic responsibility and local organisations assisting those in need in the London boroughs of Bromley and Lewisham.
4. Education: To advance education of children in the UK and overseas, including, in particular, through public and community initiatives to improve literacy and encourage the enjoyment of reading in children; and to promote sport among children and young people.

Note: The Foundation may make grants to such charitable institutions as the Trustees in their absolute discretion determine.

#### **Summary of Main Activities Undertaken for Public Benefit**

The Foundation advances health through medical research, supports economic/community development in Bromley and Lewisham, and promotes animal welfare. It makes grants to individuals, organisations, and sponsors research aligned with these purposes.

#### **Primary Activities During the Period:**

1. Fundraising Activities:

The principal means by which funds were raised were through

- the sale of children's books featuring charitable themes and recipe books from the maritime community;
- events including a golf day and guided walks; and
- corporate sponsorship through paid advertising in the recipe books.

## 2. Grant-Making and Awards

- Grant applications were evaluated against the objects of the Foundation and their likely impact.
- A new award was created, the MarineBEAR Award, as a framework for supporting marine conservation and research.
- Educational support was continued through the Simon Shades Award, supporting student charitable projects.

## 3. Community Engagement

- Direct Community Work: Colfe's School Community Day placing students in community service.
- Public Awareness: Presentations to increase awareness of available grants and charitable purposes.
- Volunteer Coordination: Supporting volunteer-led initiatives aligned with the Foundation's charitable objects.

## 4. Research and Development

- Research support through the WildBEAR and MarineBEAR awards.
- Online Platform Development: creating digital tools to advance our charitable purposes.
- Partnership Building: developing relationships with other charitable organisations.
- Capacity Building: strengthening organisational infrastructure for future grant-making.

**Public Benefit Statement:** Trustees have considered the Charity Commission's guidance on public benefit when planning activities and making grants. Positive impact is assessed before grants are made, and outcomes are monitored to ensure public benefit. The Foundation provides diverse public benefits through local community project support, animal conservation research advancement, and infant/child health especially, but not only, maternity care improvement.

## **Achievements and Performance (Period Ended 31 December 2024)**

### **Fund-Raising**

**Recipe Book Success:** The major achievement was publishing "Mealtimes with My Maritime Friends" (60 recipes, 312 pages). Production costs were covered by advance sales and sponsorships. The book was soft launched at the Annual Golf Day in June and formally launched alongside the MarineBEAR Award at an ING-hosted supper club event on 20 November 2024. It was made available to purchase on Amazon and via the Foundation's website on 10 October 2024. Total gross income in 2024 was £22,991, including advertising, bulk orders, and Amazon sales.

**Golf Day:** The Annual Golf Day at Royal Blackheath Golf Club featured nine teams with additional dinner and auction attendees. Total gross income from golf day, dinner and auctions was £8,101.

**Children's Books:** The 2024 sales target of £1,000 was not achieved. Sales continue modestly and the 2025 sales target has been adjusted to £600.

Guided Walks: Day walks were organised around Bath and Seven Sisters and the planning for a three-day Scottish excursion was explored but not implemented.

**Other Income:** During the year, Edwin Lampert provided consultancy services through the subsidiary company. All income was retained by the company for its commercial activities.

## **Grants and Community Projects**

### **Strategic Context and Grant-Making Philosophy**

During the 9-month reporting period (April-December 2024), the Foundation experienced unprecedented income growth from its recipe book success, creating both opportunities and challenges for grant distribution. While formal grants awarded during the period were modest, this reflects the trustees' commitment to rigorous evaluation processes and strategic development of sustainable award programmes.

The trustees focused on building systematic, high-impact award programmes that align with the Foundation's core objectives while maintaining strict evaluation criteria to ensure public benefit.

### **Grants Made During the Period**

#### **Formal Grants Awarded:**

Unsung Hero of the Year Award: Presented in conjunction with Royal College of Midwives at the October 2024 annual lunch, recognising exceptional dedication to midwifery and directly supporting the Foundation's health advancement objectives.

#### **Grants Under Advanced Consideration at Period End:**

Tulasizwe School Project (South Africa): A comprehensive application for funding a kitchen and food technology facility for a school serving 107 pupils with autism was under advanced consideration at 31 December 2024. This project represents potential alignment with the Foundation's educational support objectives and international development impact.

### **Application Review and Evaluation Process**

The reporting period involved rigorous evaluation of multiple applications, demonstrating the trustees' commitment to ensuring grants meet strict charitable criteria. While specific applications were under review at period end, the Foundation maintained its selective approach to ensure all grants deliver measurable public benefit aligned with its core objectives.

### **Award Programme Development During 2024**

#### **MarineBEAR Award Programme:**

Significant development work was undertaken during the period to establish this new award supporting marine conservation research and technology projects:

- Comprehensive application framework developed during 2024
- Application deadline set for 20 December 2024
- Interview and evaluation processes established
- Programme positioned for launch in early 2025

#### **Simon Shades Award Enhancement:**

The established award continued with Alex Gray (University of Bristol) receiving recognition for app development directly supporting the Foundation's digital initiatives and demonstrating its commitment to supporting students whose projects advance charitable objectives.

### **WildBEAR Award Status:**

This award remained 'hibernating' during the period, with planning underway for its potential revival in 2025.

### **Community Engagement Impact**

#### **Colfe's School Community Day Partnership:**

In June 2024, The Foundation partnered with Colfe's School for the second annual Community Day, placing Year 12 students (aged 16-17) in meaningful service roles across Lewisham. The students contributed over 300 hours of hands-on support to local schools, charities, and green spaces, including:

- Environmental Restoration: Rejuvenating a playground shelter at Rushey Green Primary School and clearing brambles at Wildcat Wilderness community green space.
- Mental Health Support: Maintaining Sydenham Garden's greenhouse facility.
- Conservation Work: Tackling invasive species and litter at Beckenham Place Park, removing six bags of plastic waste from the River Ravensbourne.
- Community Support: Additional placements at Nunhead Cemetery, St Mary's Church, Sports4All, and Aurora Nexus.

This initiative delivered tangible improvements for local organisations while inspiring civic responsibility in young people, demonstrating the power of community action in Lewisham.

### **Ongoing Community Engagement:**

Edwin continued his participation in online early pregnancy discussions and book readings to young children.

### **Grant-Making Infrastructure Development**

During 2024, the charity strengthened its grant-making capability through:

- Enhanced evaluation processes and criteria
- Partnership development with specialist organisations
- Improved application and monitoring frameworks
- Strategic focus on project-based rather than general grants

### **Forward Planning**

At the period end, the Foundation was well-positioned for expanded grant-making in 2025, with:

- Multiple award programmes in development or ready for launch
- Strengthened partnerships with evaluation specialists
- Improved financial position enabling larger grant commitments

- Enhanced processes for ensuring public benefit delivery

The foundation laid during this 9-month period positions the charity to significantly increase its grant-making impact while maintaining rigorous standards for charitable effectiveness.

## **Digital Initiatives**

### **Online Academy/Birthing and Maternity Emporium:**

The focus shifted from a conference format to a directory/listing site for existing courses. A volunteer, Vrushali, is leading the transition with a soft launch targeted within 3-6 months and a formal launch in October 2025 at the Royal College of Midwives Awards.

Note: Plans for an online BAME maternity conference were abandoned in October 2024, with trustees focusing resources on the directory model.

## **Financial Review**

The Foundation's work is funded through a combination of trading activities via its subsidiary undertaking, fundraising events, and voluntary income. Our financial strategy focuses on building sustainable income streams to support our charitable activities whilst maintaining appropriate reserves.

### **Income and Expenditure Analysis**

**Net income for the period 1 April to 31 December 2024: £7,146**

#### **Principal income sources:**

- Subsidiary trading activities: Two Special Bears Trading Limited generated £22,991 gross income from recipe book sales, event tickets, and related promotional activities, with £5,000 donated to the Foundation under Gift Aid arrangements
- Other donations and income: £1,669 from individual donors
- Bank compensation and investment income: £477

#### **Expenditure analysis:**

- Charitable activities: £250 including award grants for Unsung Hero Award and programme delivery costs
- Cost of generating funds: £1,669 covering operational expenses
- Investment: £5,000 placed in 1-year bond

**Total resources expended: £1,919**

### **Financial Position at 31 December 2024**

The Foundation's funds are held across multiple accounts to ensure operational efficiency and appropriate segregation:

- **Main charity accounts: £7,802**
- Subsidiary company accounts: £20,503
- Designated investment (1-year bond): £5,000

**Total funds: £32,305**

**Investment Policy:** The Foundation maintains a conservative investment approach prioritising security and accessibility over returns, given its active grant-making focus. Current arrangements include straightforward savings accounts with established banks and a decision during the period to invest in a 1-year bond, providing enhanced returns while maintaining appropriate security for charitable funds.

### **Reserves Policy**

The trustees maintain a minimum reserve target of £20,000 to ensure:

- Operational continuity over 48-month periods
- Ability to respond quickly to grant applications
- Buffer against income fluctuations
- Capacity to fund larger charitable projects such as future book projects, development of an online directory and further development of the app.

Current reserves position: Total funds across all accounts (£32,305) significantly exceed the minimum reserve requirement, positioning the charity well for enhanced grant-making in 2025. The subsidiary company provides additional operational security and flexibility.

Looking ahead to 2025, The Foundation has set an ambitious and strategic course to deepen its impact. Trustees have adopted a new OKR framework to guide activities and align with a refreshed annual reporting cycle. The Foundation aims to expand its grant-making, targeting £8,000 in grants and awards.

To support these goals, the Foundation has set a fundraising target of £52,600 in gross income and £16,000 in net income for 2025. Plans include selling 1,000 recipe books, expanding the popular Golf Day event, launching a new fitness fundraising platform, and growing corporate sponsorships through new partnerships.

Operationally, the Foundation plans to launch a digital Birthing and Maternity directory in October 2025 to bolster maternal health support, to roll out the new MarineBEAR Award, and to expand its volunteer programme. A formal risk register will be adopted to strengthen risk management.

Finally, the Foundation will continue to build strong partnerships - with the Royal College of Midwives, local community groups, and educational institutions like Colfe's School - while seeking new corporate partners to further expand its charitable reach and impact.

### **Long-term Sustainability**

The trustees are committed to building a sustainable model that balances ambitious charitable impact with prudent financial management, ensuring the charity can respond effectively to emerging needs while maintaining operational security.

### **Declaration**

The trustees declare that they have approved the above report.

Signed on behalf of the charity's trustees

Signature: Edwin Lampert

Full Name: Edwin Lampert

Position: Founder, The Brun Bear Foundation



Date: 01-09-2025

### **Independent Examiner's Report**

An independent examiner's report is submitted alongside, albeit as a separate document, confirming accounting records compliance with the Charities Act and that accounts align with records and applicable regulations.

Column1	Column2
THE BRUN BEAR FOUNDATION	
RECEIPTS AND PAYMENTS ACCOUNT	
For the period 1 April 2024 to 31 December 2024	
Charity Number: 1174159	
RECEIPTS	2024
	£
Donations and legacies:	
Gift Aid donation from subsidiary	5000
Individual donations	1669
Bank compensation	200
Total donations and legacies	6869
Investment income:	
Bond interest	277
TOTAL RECEIPTS	7146
PAYMENTS	2024
	£
Charitable activities:	
Grants to individuals	250
Cost of generating funds:	
Fundraising costs	1669
TOTAL PAYMENTS	1919
NET RECEIPTS/(PAYMENTS)	5227
Cash funds brought forward at 1 April 2024	2575
Cash funds carried forward at 31 December 2024	7802
STATEMENT OF ASSETS AND LIABILITIES	
As at 31 December 2024	
Cash at bank and in hand	7802
Investment - 1 year bond	5000
Net assets	12802
NOTES TO THE ACCOUNTS	
1. Accounting policies	
These accounts have been prepared on a receipts and payments basis in accordance with Section 133 of the Charities Act 2011.	
2. Related party transactions	
The charity received a Gift Aid donation of £5000 from its wholly owned subsidiary Two Special Bears Trading Limited (Company number: 14828160).	
3. Independent examination	
These accounts have been subject to independent examination in accordance with Section 145 of the Charities Act 2011.	
4. Trustees	
No trustee received any remuneration or reimbursement of expenses during the period.	
Approved by the trustees on Monday 1 September 2025	
Peter French (Chair)	
Edwin Lampert (Founder)	
Dorothy Lampert (Treasurer)	