

Annual Report and Review 2023



-- Report and Financial Statements 2023 --

The James Anthony Foundation

C/O C O'Connor 4 Fort William Close, Greylees, Sleaford, NG34 8GY

Registered Charity: 1202365

Trustees (during reporting period):

Chantelle O'Connor

Carl O'Connor

Victoria O'Connor

Michelle Bailey

Jadene Crispe

Christopher Williams

Overview

The James Anthony Foundation (TJAF) is a registered charity (England and Wales) working to deliver against the following charity objectives.

The James Anthony Foundation will work to relieve the need and raise public awareness of paediatric brain and spinal tumours, and their associated signs and symptoms by:

- a) Providing information on available services to families upon a cancer diagnosis*
- b) Support and advising parents and siblings after a child's passing from cancer*
- c) Providing gifts to children under treatment of brain and spinal tumours, along with their siblings*

Fundraising activities started in 2022 and it quickly became clear that the group would benefit from the formal CIO recognition. To that end, TJAF became a registered charity on the 16th of March 2023. During the initial period of operation, TJAF focussed on the following activities:

- Validating of the scope of the need as described in the Charitable Objects
- Operationalising the organisation
- Undertaking a combination of campaign based and event based fundraising activities
- Exploring potential partnerships to increase impact in 2024 onwards

The first nine months of operation proved extremely successful in terms of scope validation, partnerships and fundraising. We are particularly grateful to these individuals and groups who supported TJAF through this early phase. As described in later sections, our activities focussed heavily on Charitable Object (C) however moving into 2024-2025 TJAF will seek to more strongly address Charitable Objects (A) and (B).

Within this report, we begin with a letter from the Chair of Trustees and then proceed to set out our charitable objectives (**Section A**) and a summary of the strategy agreed in 2023 to help implement these objectives (**Section B**). We then give a report on activities in 2023 (**Section C**), a summary of our governance and management (**Section D**) and an overview of our finances in 2023 (**Section E**). We then look to the future, with details of events and opportunities in 2024 (**Section F**), and ways you can stay informed about our work (**Section G**).

From Our Trustees

The trustees were proud and excited to launch The James Anthony Foundation as a registered charity in 2023. This marked the culmination of a great deal of work throughout 2022. We are confident that our strategy equips TJAF to deliver on its charitable objectives, being mindful to learn from the experience and knowledge we accumulated over these early years.

As you will see when reading this review, we have been focussed on building effective partnerships with key partners, to amplify the impact of our work. In parallel, we have strongly leveraged low cost social media to significantly exceed our fundraising targets for 2023 and we have exciting plans to sustain this momentum into 2024. These and all our other activities depend on the commitment and talent of a wide range of people from the voluntary team. Throughout 2023, the trustees were once again deeply impressed by the skills and passion of those who worked for and with us.

The launch of The James Anthony Foundation as a registered charity and our initial successes give us the confidence to forge ahead to raise awareness and provide direct support to children, their siblings and the wider families impacted by childhood brain and spinal cancers.

We warmly welcome and thank all those who have contributed to our success in 2023 and we look forward to continuing to work together during 2024

Chantelle O'Connor
Chair of Trustees

A. Charitable Objectives

The James Anthony Foundation, established in 2023, is a registered charity working to relieve the need and raise public awareness of paediatric brain and spinal tumours, and their associated signs and symptoms. As stated in our Governing Constitution, The James Anthony Foundation provides public benefit (nationally and internationally) through the following Charitable objects:

To relieve the need and raise public awareness of Paediatric Brain and Spinal Tumours, and their associated signs and symptoms by;

- a. Providing information on available services to families upon a Cancer diagnosis.*
- b. Supporting and advising parents and siblings after a child's passing from Cancer.*
- c. Providing gifts to children under treatment of Brain and Spinal Tumours, along with their siblings*

In addressing these objects, we provide public benefit through both direct and indirect support to families. In setting our aims for the year and preparing this review, the trustees have given due regard to the Charity Commission guidance on public benefit.

B. Strategy

TJAF seeks to address a specific need identified by the Co-founders through their lived experience as parents of a child with brain cancer. Their passion and determination brought together the Trustees and drove the initial fundraising efforts, however during the formalisation and subsequent initial operations of the TJAF, the Trustee team have formulated a strategy that seeks to address our Objects over the next few years, to the end of 2026. The Trustees acknowledge that there are a number of large, well-established and well-funded charities which support childhood cancers including brain tumours and seek to partner appropriately with these organisations to maximise impact, whilst still delivering on TJAF's core mission.

Our main priorities for 2023-2026 are:

1. Establish and then improve key functions within the organisation, ensuring good governance and compliance for each of finance, marketing, partnerships, etc
2. Assess the skills needed to deliver on our charitable objects and recruit if/as needed
3. Develop an online web/social presence to support direct and indirect fundraising through diverse streams to generate sufficient revenue to sustain our operations and establish appropriate reserves
4. Support families impacted by childhood brain and spinal cancer through direct donations and information
5. Identify key potential partners and establish referral schemes to more effectively target those in need of support

Our Geographical Focus

Our initial focus is Lincolnshire, however, we seek to increase our geographical coverage to other counties in the UK over time.

Our Values and Commitments

The values below define our approach to all aspects of our work:

Integrity: We will align our conduct with what we know to be excellent.

Collaboration: We will cultivate relationships to deliver impact in partnership with others.

Humility: We have much to learn and will take steps to listen and grow.

C. Activities and Impact in 2023

In seeking to fulfil our objectives and provide broad public benefit, we have undertaken the following charitable activities during our first nine months of operations in 2023:

Direct support to families in need

TJAF established a number of operational partnerships with hospitals in Nottinghamshire plus major organisations such as PASIC, Young Lives for Cancer and Make a Wish to support the following:

- Easter and Christmas deliveries distributed directly to childhood cancer wards in Nottingham hospital
- Ongoing support packages distributed via referrals from PASIC (across the East Midlands), Young Lives vs Cancer and the NHS (Bereaved families in the Community and Community nurses)
- Support packages for families travelling to lapland as part of the Make a Wish project

Through the above activities we estimate we have supported well over 500 families during our first nine months..

Organisation

During this initial phase there has been an effort to establish financial procedures and a variety of supporting policies to enable TJAF to operate in an efficient manner and comply with legal and regulatory requirements, with activities including:

- Creation of an initial suite of relevant policies
 - Financial procedures, Financial reserves, Safeguarding and Serious Incident
- Establish charity bank accounts and associated donation processing options
 - Virgin Money bank account plus CAF donation processing

- Creation of a website and associated Facebook/Instagram channel to develop a following for our activities
- Preparation of our first-period Annual report and related documentation for submission to the Charities Commission

Summary

These activities demonstrate the positive impact of *The James Anthony Foundation*, with respect to our three primary charitable objectives.

Key Learnings and Reflections

Reflecting on our initial period of operation, the team have the following reflections and learnings:

- Increase the digital and physical sign-posting activities, integrating with the physical gift packs, to directly provide information to families in need
- Streamline the referrals process to increase the efficiency of distribution of both gift packs and information to families in need
- Our fundraising activities were more successful than expected. It is important to balance revenue generation with expenditure moving forward and also engage existing donors to ensure ongoing support.
- Further work is needed to ensure that we have procedures in place, which complement our policies, to ensure we manage the sensitive information related to the families we support in line with best practices and legislations such as GDPR and the Data Protection Act.

D. Governance and Management

Board of Trustees: Trustees have been appointed to oversee and guide our work, in accordance with our Governing Document (based on the Charity Commission's 'Foundation' model constitution for a Charitable Incorporated Organisation whose only voting members are its charity trustees).

Chantelle O'Connor

Chantelle co-founded TJAF in 2023. She is currently our Chair of Trustees and volunteers as Safeguarding officer, in addition to managing the day-to-day operations of TJAF. She has extensive experience supporting children with complex needs in various professional settings in combination with her own lived experience as a parent of a child with brain cancer.

Carl O'Connor

Carl co-founded TJAF in 2023 and is currently a Trustee. He also volunteers to undertake the day-to-day management of TJAF. His background is in engineering and technology development in the Royal Air Force.

Victoria O'Connor

Viki is a Trustee and also volunteers as Treasurer. She brings experience in the fields of finance, governance and strategy from her professional roles as Managing Director of a software company and volunteer Co-CEO of a sustainable development charity (Geology for Global Development).

Jadene Crispe

Jadene is a Trustee and volunteers as a Fundraiser, leading a number of successful fundraising initiatives for TJAF. She has a background in administration and is involved in a variety of other charitable organisations alongside her work with TJAF..

Christopher Williams

Chris is a Trustee and volunteers as a Fundraiser, organising the annual TJAF charity football match. Chris brings extensive experience in corporate governance and finance from his professional background in reinsurance.

Michelle Bailey

Michelle is a Trustee and volunteers as a Fundraiser, establishing a highly successful funding stream through a partnership with Interflora. She has a background in corporate administration which she applies to supports TJAF's ongoing gifting initiatives.

Other support: To deliver on our objectives, TJAF has begun recruiting volunteers with relevant experience and expertise to support and scale up our operations.

Mark Green

Mark volunteers with TJAF as website coordinator, drawing upon his extensive experience in corporate strategy, sales and marketing, through his roles in technology presales and buyer enablement, with companies including IBM, Infor, Sage and Consensus. .

E. Financial Overview

The accounts below document financial activity (income and expenditure) that occurred in 2023. The Statement of Financial Activities is calculated on a cash basis. The Balance Sheet shows total funds including non-cash assets and liabilities.

Key observations include that during 2023 our income was:

- **Unrestricted Income £18,446**
- **Restricted Income. £0**

As 2023 was our first year of operation, the net movement in *unrestricted* funds (excluding the non-cash assets and liabilities shown on the Balance Sheet) from 2022 to 2023 was therefore £0. The total net movement in cash funds between years (including both *unrestricted* and *restricted* funds) was also £0.

Our Charity Reserves Policy sets an ambition to ensure free reserves of around nine months of operational costs. Based on budgeted expenditure of approximately £10,000 in 2023, this equates to approximately £5,000. The level of reserves held by the organisation will be monitored carefully by the Trustees.

During 2024 we budget expenditure in two key areas:

1. **Projects (£8-8.5k)**
2. **IT equipment (£1-1.5k).**

The Trustees recognise that planned expenditure is currently not aligned with the income projections. They plan to review the various initiatives during mid-2024 to scale up activities if/as needed.

Many of our activities were delivered through the dedication of a team of volunteers, representing significant in-kind support not shown in our financial statements. We are very grateful to all those who gave their time in 2023 to help realise our charitable objectives.

TJAF Statement Of Financial Activities (as at 31 December 2023)

	Unrestricted Funds (£)	Restricted Funds (£)	Total 2023 (£)	Total 2022 (£)
Income and endowments from:				
Donations and legacies	16,643	--	16,643	--
Activities for Generating Funds	--	--	--	--
Charitable activities	544	--	544	--
Other trading activities	965	--	965	--
Investment income	294	--	294	--
Total Income	18,446	--	18,446	
Expenditure on:				
Costs of Generating Voluntary Receipts	--	--	--	--
Raising funds	--	--	--	--
Investment Management Costs	--	--	--	--
Charitable activities	(3,821)	--	(3,821)	--
Governance Costs	--	--	--	--
Total Expenditure	(3,821)		(3,821)	
Surplus/(Deficit) of income over expenditure	14,625		14,625	
Net gains/(losses) on investments	--	--	--	--
Net income/(expenditure)	14,625		14,625	
Transfers between funds	--	--	--	--
Net movement in funds	14,625		14,625	
Reconciliation of funds				
Total funds brought forward	14,625		14,625	
Total funds carried forward	14,625		14,625	

Balance Sheet (as at 31 December 2023)

	2023 (£)	2022 (£)
Fixed Assets		
Tangible Assets	209	--
Investments	--	--
Total Fixed Assets	209	--
Current Assets		
Debtors: Due in one year	--	--
Debtors: Due after one year	--	--
Cash at Bank and in hand	14,625	
Total Current Assets	14,625	
Current Liabilities		
Creditors due within one year	--	--
Net current assets	14,625	
Total assets less current liabilities	14,834	
Funds		
Unrestricted Funds	14,625	
Restricted Funds ²	--	
Total Funds	14,625	

Cash Flow Statement (as at 31 December 2023)

	2023 (£)	2022 (£)
Cash flows from operating activities:		
Net cash provided by operating activities	18,152	--
Cash flows from investing activities:		
Net cash provided by investing activities	294	--
Cash flows from financing activities:		
Net cash provided by financing activities	--	--
Change in cash and cash equivalents in the reporting period	18,446	--
Cash and cash equivalents at the beginning of the reporting period	0	--
Change in cash and cash equivalents due to exchange rate movements	--	--
Cash and cash equivalents at the end of the reporting period	18,446	--

F. Looking to the Future

In 2024, based on our reflections and key learnings, we will build on our existing initiatives and seek to establish new partnerships.

During 2024 our goals are to:

- Reduce the **response time** and **expand** the geographic remit of our existing referral programs
 - PASIC
 - Young Lives vs Cancer
 - NHS (various)
- Increase our digital and physical **signposting** activities to complement our gift deliveries
 - Reading lists for anticipatory grief
- Expand the scope of gifting to include **sensory** toys and potentially develop lending **libraries** at local hospices
- Explore incorporating **bereaved families** within the local community into the group of children and parents we support.
- Seek out new **partnerships** to support delivery, referrals and fundraising
- Invest in IT **equipment** to support our delivery activities
- Further **diversify** our income sources and engage existing donors through digital content to ensure continued support
- Investigate **outsourcing** of time-consuming activities and/or recruit additional volunteers to support these activities

Updates on these activities will be detailed in our 2024 Annual Report (published in 2025), with live updates regularly posted on our website and social media.

G. Further Information

Find the latest TJAF news, events and opportunities to get involved on our website

(<https://www.thejamesanthonyfoundation.com/>)

Facebook (<https://www.facebook.com/thejamesanthonyfoundation>)

Download this Annual Report and Review from our website

(https://www.thejamesanthonyfoundation.com/about_us) .



CHARITY COMMISSION
FOR ENGLAND AND WALES

The James Anthony Foundation

1202365

Receipts and payments accounts

CC16a

For the period
from

1-Jan-23

To

31-Dec-23

Section A Receipts and payments

	Unrestricted funds	Restricted funds	Endowment funds	Total funds	Last year
	to the nearest £	to the nearest £	to the nearest £	to the nearest £	to the nearest £
A1 Receipts					
Voluntary Receipts (Donations, Legacies and Grants)	16,643		-	16,643	-
Investment Dividends/Interest	294	-	-	294	-
Activities for Generating Funds (Fundraising Events)			-	-	-
Charitable Activities	544	-	-	544	-
Other receipts	965	-	-	965	-
Sub total (Gross income for AR)	18,446	-	-	18,446	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	18,446	-	-	18,446	-
A3 Payments					
Costs of Generating Voluntary Receipts	-	-	-	-	-
Fundraising Costs	-	-	-	-	-
Investment Management Costs	-	-	-	-	-
Costs of Charitable Activities	3,612	-	-	3,612	-
Governance Costs	-	-	-	-	-
Sub total	3,612	-	-	3,612	-

A4 Asset and investment purchases, (see table)					
	209	-	-	209	-
Sub total	209	-	-	209	-
Total payments	3,821	-	-	3,821	-
Net of receipts/(payments)	14,625	-	-	14,625	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	14,625	-	-	14,625	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds	Cash at Bank	14,625	-	-
		-	-	-
		-	-	-
	Total cash funds	14,625	-	-
	(agree balances with receipts and payments account (s))	OK	OK	OK
		Unrestricted funds	Restricted funds	Endowment funds
	Details	to nearest £	to nearest £	to nearest £
B2 Other monetary assets			-	-
		-	-	-
		-	-	-

B3 Investment assets

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-

B4 Assets retained for the charity's own use

Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
		-	-
		-	-
		-	-

B5 Liabilities

Details	Fund to which liability relates	Amount due (optional)	When due (optional)
		-	
		-	
		-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval
<i>Carl O'Connor</i> Carl O'Connor (Aug 30, 2024 20:07 GMT+1)	Carl O'Connor	30th Aug 2024
<i>Victoria O'Connor</i>	Victoria O'Connor	30th Aug 2024







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Final Audit Report

2024-08-30

Created:	2024-08-30
By:	Victoria O'Connor (viki.oconnor@pds.group)
Status:	Signed
Transaction ID:	CBJCHBCAABAAmLLAC3lvWuFzCcQ8L7zHdE_F5tXr-nFn

"CC16a_130418_JAF2023_Signed" History

-  Document created by Victoria O'Connor (viki.oconnor@pds.group)
2024-08-30 - 7:06:37 PM GMT
-  Document emailed to thejamesanthonyfoundation@gmail.com for signature
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-  Email viewed by thejamesanthonyfoundation@gmail.com
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-  Signer thejamesanthonyfoundation@gmail.com entered name at signing as Carl O'Connor
2024-08-30 - 7:07:17 PM GMT
-  Document e-signed by Carl O'Connor (thejamesanthonyfoundation@gmail.com)
Signature Date: 2024-08-30 - 7:07:19 PM GMT - Time Source: server
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