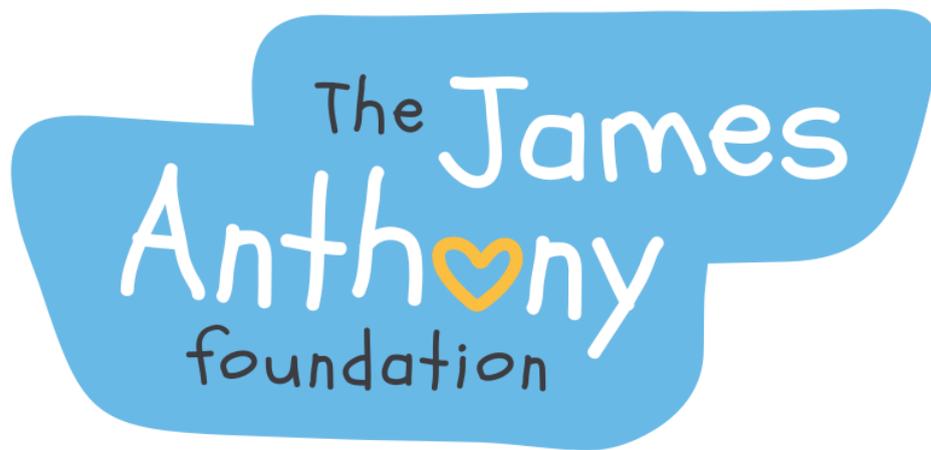


Annual Report and Review 2024



-- Report and Financial Statements 2024 --

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

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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 have built on these early successes during 2024, substantially increasing our income, which has enabled us to scale up our delivery and increase our impact . During 2023 and 2024 we were strongly focused on Charitable Object C however moving into 2025-26 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 2024 (**Section C**), a summary of our governance and management (**Section D**) and an overview of our finances in 2024 (**Section E**). We then look to the future, with details of events and opportunities in 2025 (**Section F**), and ways you can stay informed about our work (**Section G**).

From Our Trustees

It has been a pleasure to be part of the Trustee group for 2024, as The James Anthony Foundation completed its first full year of operation, scaling up our initiatives to meet the demand we validated during 2023.

During 2024 we continued to generate revenue through direct donations, however this was matched by a significant number of fundraising events through the year, from fun runs to shaved heads! All of these efforts meant that we were able to raise almost 40% more income than we originally projected. We are very grateful to all those that organized events, including RAF Waddington, Sleaford Rotary and the team at Maidstone football ground. We would like to express our gratitude towards IV Creative, a corporate partner who has supported us through fundraising throughout this year, including climbing the Matterhorn in Switzerland, as well as printing cards, handouts and match programmes all at no cost to the charity. We would also like to thank our other main corporate partner, Interflora, with whom we established a partnership in late 2023 and who continue to support us through 2025.

As you will see in this report, we have been able to deliver direct support to more families than before, in many cases, through our partnerships with PASIC, Young Lives for Cancer and the Rainbows Hospice. We will sustain these partnerships with these larger organisations moving forward to ensure we deliver effective support to children, their siblings and families undergoing treatment, allowing us to support them in a way which is complementary to that which they receive from other groups.

We have existing plans for 2025, where we will capitalize on our growing social media presence to sustain momentum and continue to raise awareness. These and all our other activities depend on the commitment and talent of a wide range of people from the voluntary team. Throughout 2024, the trustees were once again deeply impressed by the skills and passion of those who worked with us and we look forward to continuing to work together during 2025.

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 2024

In seeking to fulfil our objectives and provide broad public benefit, we have undertaken the following charitable activities during our first full year of operation in 2024:

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 When You Wish Upon a Star project

Through the above activities we estimate we have supported well over 300 families during 2024.



Rainbows Hospice Sensory Library

During 2024 we partnered with the Rainbows hospice in Loughborough to provide a sensory library which can be used by residents and also by community nurses undertaking home visits. We have also carried out 2 drops of Lego to their facility, for the families staying at the hospice to use.



<https://www.rainbows.co.uk/charity-information>

Organisation

We have consolidated various financial procedures and supporting policies to enable TJAF to operate in an efficient manner and comply with legal and regulatory requirements, with activities including:

- Creation and review of an initial suite of key 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
- Obtain equipment for use for the next few years of digital operations.
- Mature the website and associated Facebook/Instagram channel to increase the following for our activities
- Preparation of our second-period Annual report and related documentation for submission to the Charities Commission

Website link: <https://www.thejamesanthonyfoundation.com/>

Facebook/Instagram: <https://www.facebook.com/thejamesanthonyfoundation>

LinkedIn:

<https://www.linkedin.com/company/the-james-anthony-foundation/?viewAsMember=true>

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.

Joshua O'Connor

Joshua (James' brother) volunteers under the direct supervision of his parents, to support the preparation and distribution of hospital packs as part of our referral project with PASIC and Young Lives vs Cancer. Joshua assists with presentations within the community alongside us, representing the charity to spread awareness of paediatric brain and spinal tumours.

E. Financial Overview

The accounts below document financial activity (income and expenditure) that occurred in 2024. The Statement of Financial Activities is calculated on a cash basis. The Balance Sheet shows total funds including non-cash assets and liabilities.

Overview of current position

Key observations include that during 2024 our income was:

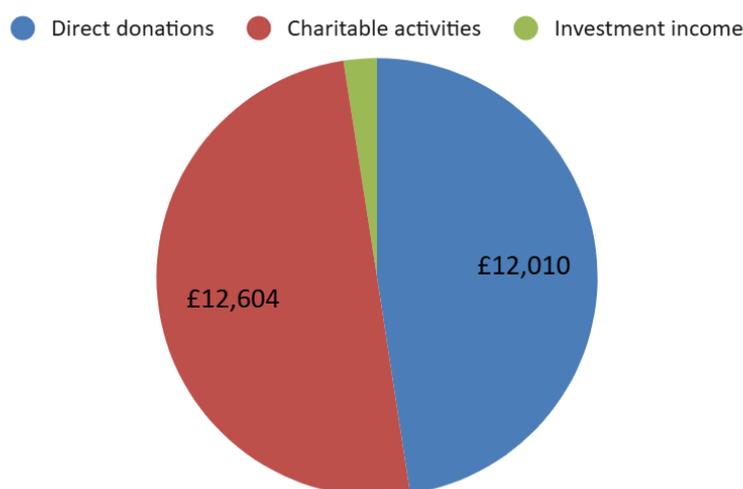
- **Unrestricted Income £25,229**
 - This represents an increase of 37% from 2023 (£18,446)
- **Restricted Income. £0**

The James Anthony Foundation was registered in March 2023, so 2024 was our first full year of operation. During 2024 the net movement in *unrestricted* funds (excluding the non-cash assets and liabilities shown on the Balance Sheet) from 2023 to 2024 was therefore £12,695. Our Fixed Assets are £1,509 which comprise computer equipment. The Cash at hand and in the bank at the end of 2024 was **£27,320**.

Our Charity Reserves Policy sets an ambition to ensure free reserves of up to nine months of operational costs. Based on budgeted expenditure of approximately £10,000 for 2024/5, this equates to approximately £8-9,000. The level of reserves held by the organisation will be monitored carefully by the Trustees.

Income during 2024

During 2024 our income was derived from three sources, direct donations (48%), charitable activities (50%) and a small amount of investment income (2%). The amounts are shown below:

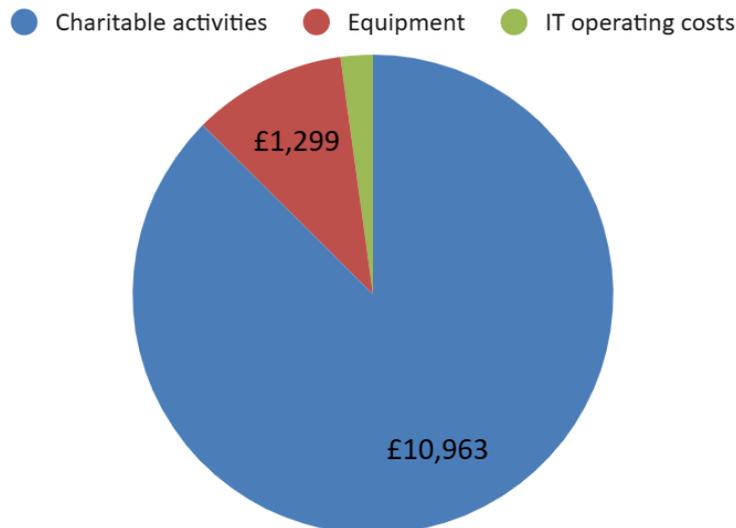


This is a notable increase in income compared to 2023 and it was driven by a substantial increase in the number of fundraising events.

Expenditure during 2024

In our 2023 Annual Report we projected 2024 expenditure split between our ongoing projects (80-85%) and an investment in IT equipment (10-15%) needed to support the administrative requirements and the marketing of upcoming events.

During 2024 we spent £12,534, investing 88% to our charitable activities/projects and 12% to a combination of IT equipment and website/domain subscriptions needed to promote the charity. This was slightly above our projected expenditure, however the Trustees felt this was acceptable given the dramatic increase in income over the same period.



Mid-term income/expenditure

In terms of ongoing revenue, the Trustees recognize that 2024 may represent a higher-than-expected annual income, as the charity's activities were ramping up over this period. However, they also believe that the combination of direct giving and events-related income generation is sustainable in the short-to-mid term, so will continue to pursue this dual approach.

As the James Anthony Foundation is now established, budgeting for the mid term is now possible. Below is our current 5-year budget, which shows that our minimum annual fundraising goal should be in the region of £6,000 in order to sustain the current activity level for the next five years.

Activity category	2025	2026	2027	2028	2030
Operations (IT etc)	£500	£550	£600	£650	£700
Partner projects for direct giving (PASIC, YLC, etc)	£8,000	£8,000	£8,000	£8,500	£8,500
Partner projects for shared use (hospice sensory library, sensory garden)	£1,000	£1,250	£1,500	£1,750	£2,000
Total budgeted expenditure	£9,500	£9,800	£10,100	£10,900	£11,200
Balance based on no new income generation (i.e. EOY 2024 funds)	£17,820	£8,020	(£2,080)	(£12,980)	(£24,180)
Balance assuming new annual income of £6000	£23,820	£20,020	£15,920	£11,020	£5,820

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 2024 to help realise our charitable objectives.

TJAF Statement Of Financial Activities (as at 31 December 2024)

	Unrestricted Funds (£)	Restricted Funds (£)	Total 2024 (£)	Total 2023 (£)
Income and endowments from:				
Donations and legacies	12,010	--	12,010	16,643
Activities for Generating Funds	--	--		--
Charitable activities	12,604	--	12,604	544
Other trading activities	--	--	--	965
Investment income	615	--	615	294
Total Income	25,229	--	25,229	18,446
Expenditure on:				
Costs of Generating Voluntary Receipts	(272)	--	(272)	--
Raising funds	--	--	--	--
Investment Management Costs	--	--	--	--
Charitable activities	(10,963)	--	(10,963)	(3,821)
Governance Costs	--	--	--	--
Total Expenditure	(11,235)	--	(11,235)	(3,281)
Surplus/(Deficit) of income over expenditure	12,695	--	12,695	14,625
Net gains/(losses) on investments	--	--	--	--
Net income/(expenditure)	12,695	--	12,695	14,625
Transfers between funds	--	--	--	--
Net movement in funds	12,695	--	12,695	14,625
Reconciliation of funds				
Total funds brought forward	27,320	--	27,320	14,625
Total funds carried forward	27,320	--	27,320	14,625

Balance Sheet (as at 31 December 2024)

	2024 (£)	2023 (£)
Fixed Assets		
Tangible Assets	1,509	209
Investments	--	--
Total Fixed Assets	1,509	209
Current Assets		
Debtors: Due in one year	--	--
Debtors: Due after one year	--	--
Cash at Bank and in hand	27,320	14,625
Total Current Assets	27,320	14,625
Current Liabilities		
Creditors due within one year	--	--
Net current assets	27,320	14,625
Total assets less current liabilities	27,320	14,625
Funds		
Unrestricted Funds	27,320	14,625
Restricted Funds ²	--	--
Total Funds	27,320	14,625

Cash Flow Statement (as at 31 December 2024)

	2024 (£)	2023 (£)
Cash flows from operating activities:		
Net cash provided by operating activities	24,614	18,152
Cash flows from investing activities:		
Net cash provided by investing activities	615	294
Cash flows from financing activities:		
Net cash provided by financing activities	--	--
Change in cash and cash equivalents in the reporting period	12,695	--
Cash and cash equivalents at the beginning of the reporting period	14,625	--
Change in cash and cash equivalents due to exchange rate movements	--	--
Cash and cash equivalents at the end of the reporting period	27,320	14,625

F. Looking to the Future

In 2025, based on our reflections and key learnings, we will build on our existing initiatives and seek to establish new partnerships.

During 2025 our goals are to:

- Further 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.
- Build on existing **partnerships** to support delivery, referrals and fundraising
- Build on our **diversified** income sources, engaging 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 2025 Annual Report (published in 2026), 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/>)

Download this Annual Report and Review from our website (https://www.thejamesanthonyfoundation.com/about_us) .