



Annual Review 2001



LionHeart

FOR RICS MEMBERS AND
THEIR DEPENDANTS IN NEED

A promotional opportunity

LionHeart is no longer producing the RICS Christmas card, but instead invites companies to send Christmas greetings to clients and business associates, by including their company logo in a full colour advertisement published by LionHeart in Estates Gazette at Christmas. This is a splendid opportunity for companies large and small, who make a donation of £250 to the charity at Christmas.

We hope these and other companies will continue their support during the festive season through inclusion in this Christmas greeting advertisement again in 2002.



"I am writing to express appreciation of the kindness and generosity you have given to our daughter, following the sudden death of her husband from a heart attack at the age of 46. She has told us of the financial help that LionHeart has given her and how this will be of real practical assistance during the year ahead...We cannot thank you enough for all you have done..."

Refreshed image and new web site for LionHeart

2001 saw a new image for LionHeart – a new logo and corporate colours. This change follows a review of the LionHeart image prior to implementing a new marketing strategy. But marketing is far more than the use of a logo, although it is essential to establish a clear identity for any marketing to be successful.

The new LionHeart web site was launched in February 2002. Pages feature LionHeart services and fundraising events, news, and local information for each RICS region. It is interactive, enabling people to email their suggestions, enquiries and requests for information to the charity. There is an online facility for making a Gift Aid declaration and the site will ultimately handle online donations. One page will feature major corporate supporters with links to their own web sites, and there will be links with other charity sites for people requiring information. LionHeart Link, the magazine for volunteers and supporters, will be posted on the web site. Anyone without access to the web should contact Chris Wall to receive a copy of LionHeart Link.

"We are very excited about this development", said Mike Carter, Chief Executive. "It is an essential part of our strategy to improve communications with members of the RICS, making us more accessible to those in need and getting closer to our supporters."

The site was designed by, and is hosted by, Areza who have undertaken the work at a beneficial price as part of their commercial support to charities. Organisers of fundraising events will be able to attract wider support by posting details on the web site.

Visit the newly-launched site at www.lionheart.org.uk



Tricia's story

Paul worked for Morrisons Supermarket in Darlington where he met Tricia 10 years ago. They lived in a mortgaged property and Paul adopted Lauren from a previous relationship. The family was complete when Ashleigh was born 7 years ago. Paul wanted to offer his family a better future and decided to train as a Chartered Surveyor. He was awarded a place at the University of Newcastle where he excelled in his studies. He stayed with friends in Newcastle weekdays, returning home to his family at weekends. Tricia continued to work weekends at Morrisons to help fund his studies. Their long term plan was to work and live in America following Paul's graduation.

In March, following Paul's 34th birthday, whilst on his way home during the late evening, a man engaged him in conversation on the corner of his road. Without warning the man punched him on the head and fractured one side of his skull. The fracture was compounded as Paul fell hitting his head on the pavement. He was admitted to hospital where he died 24 hours later without regaining consciousness.

Paul had been the victim of a vicious and dangerous "game" whereby a group of travelling itinerants would identify a "townie". One of the group would approach the victim and deliver a single punch. If the victim fell the assailant scored a point. If the punch did not fell the victim the group would look for another victim. Four other people had been assaulted by the group prior to the lethal blow that felled Paul. The perpetrator was found and eventually sentenced to 2 years imprisonment, extended by 1 year on appeal.

Clearly the family were devastated by the fact that Paul had been taken away from them in this violent and senseless way. Tricia and her daughters have suffered severely from the effects of their bereavement and this sense of loss has left them struggling to comprehend life without Paul. Seven year old Ashleigh is finding it hard to understand the concept of death and to come to terms with the fact that Paul has gone forever. Eleven year old Lauren is having behavioural problems at school as the enormity of losing her dad has left her feeling vulnerable and overwhelmed. Tricia is in emotional turmoil and is finding every day difficult to live without Paul.

Because of the complex nature of the support needed in this case Bena Kansara, Senior Welfare Advisor, took an immediate and continuing interest in this family. She has visited them on many occasions and has maintained regular telephone contact to support Tricia and her daughters. Bena has helped Tricia claim relevant State benefits and accompanied her to the Royal Courts of Justice for the appeal hearing against the leniency of the assailant's sentence.

Tricia says "you have been my lifeline. Whilst your financial help was of great assistance I could not imagine how I would have coped without your support. Paul would have been so proud to belong to an Institution that cares so much for its members and their dependants."

A detective of the Durham Constabulary "Victim Support Unit" who has worked closely in supporting the family wrote to praise the "fantastic support" Bena has given.

He said, "...the family has been overwhelmed by all your support and assistance. I can only hope that should anything happen to me, that the police are half as good at supporting my family as LionHeart have been to Paul's."



Left to right: Ashleigh, Paul, Lauren, Tricia.

Dates for your diary

Date	Event
2002	
31 May	Bristol and Bath Association Social Evening aboard a local paddle steamer
13 June	LionHeart AGM at RICS, Great George Street, London SW1
14 June	Republic of Ireland Golf at Woodbrook Golf Club, Bray, County Whitlow
27 June	Golf Challenge at The Shropshire, Granville Park, Muxton, Telford
28 June	Annual Clay Pigeon Shoot, West Wycombe Shooting Ground
11 July	Eastern Region Karting Evening at Rye House track, Hoddesdon
30 August	Scottish Golf Challenge at Blairgowrie Golf Club, Rosemount
17 September	Surrey Golf Day at Royal mid-Surrey Golf Club
22 September	Warwickshire Heart Cycle Ride in aid of LionHeart & British Heart Foundation
3 October	Eastern Region Karting Evening at Rye House track, Hoddesdon
5 November	RICS Property Quiz, Grosvenor House, London
2003	
February	West Midlands Property Quiz
13 April	Flora London Marathon

Contact Chris Wall for help promoting your event on **0845 6039057** or email cwall@lionheart.org.uk

How much did members in your region donate?

The totals shown do not relate directly to the summary of accounts which have been prepared in accordance with SORP 2000.

Region	Average per member	Donations/Contributions	Membership
Republic of Ireland	13.11	16,941	1,292
London	9.87	181,785	18,413
West Midlands	7.22	45,879	6,346
East of England	6.64	48,687	7,326
North West	6.52	54,519	8,356
Scotland	5.25	42,189	8,030
South East	5.10	76,007	14,902
Wales	4.89	14,590	2,983
East Midlands	4.52	19,676	4,353
Yorkshire & Humberside	4.11	21,995	5,341
Northern Ireland	3.89	6,578	1,687
South West	3.87	29,051	7,501
North East	3.69	8,963	2,427
Overseas	2.92	33,753	11,548
No branch: other fundraising activities	-	17,604	41
Income tax received on deeds of covenant	-	8,073	-
Legacies	-	42,943	-
London Marathon	-	15,903	-
		685,136	100,546

"I really don't think you could improve your excellent service. The only thing that needs improving is your profile. I think that LionHeart is still misunderstood by a significant percentage of RICS members. It is certainly not as revered as it should be. I had been a member for 10 years and didn't really appreciate what LionHeart was capable of providing."

Surveyors' Football League raises £2,000 for LionHeart

Kerry Dixon, former Chelsea and England international footballer, presented Prudential with the Premier Division winner's trophy in the 2001 Surveyors' Football League, which they have won for an unprecedented fourth successive season. The runners-up prize in the Premiership went to Healey & Baker. In the First Division, the League winner was CB Hillier Parker, with FPD Savills as runner-up. The League raised £2,000 for LionHeart in the 2000-01 season.

The League is seeking further expansion next season and all interested property teams should contact Colin Jones at colin.jones@prupim.com or tel **020 7548 6600** for further details.



Prudential – Surveyors' Football League Premiership winners 2000-01. Back row (left to right): Pat Allwood-West, Kerry Dixon, Nigel Best, Paul Norton, Mark Brannan. Front row (left to right): Mitch Layng, Simon Copley, Graeme Canning, Richard Diprose, Peter Tungatt.

Warwickshire Heart Cycle Ride raises £6,000

Over £6,000, raised by the third Warwickshire Heart Cycle Ride held in September 2001 was shared between the British Heart Foundation and LionHeart.



*The Alderman Callow School team
at Surveyor Court, Westwood Business Park, Coventry,
after completing the Warwickshire Heart Cycle Ride.*

Nearly 200 adults and children enjoyed a cycle ride from Westwood Business Park through the picturesque Warwickshire countryside, following a 12, 30 or 50 mile route. Each route was carefully selected to combine interest, safety and scenic beauty. In addition to the many families and individuals taking part, team entries included pupils from Alderman Callow School and Blazing Saddles Riding Club for people with disabilities. Property firms taking part included Drivers Jonas, Bruton Knowles, Colliers CRE, Jones Lang La Salle and Laing Homes Specialist Team. Awards will be presented by the Lord Mayor and Lady Mayoress of Coventry to the individual man and woman and the team raising the most money for the charities on 13 May 2002, hosted by local radio broadcaster, Bob Brolly.

Firms wishing to sponsor this event on 22 September 2002, which will be opened by the Lord Mayor of Coventry, should contact Chris Wall at LionHeart on **0845 6039057** or email cwall@lionheart.org.uk for further details.

"The beds arrived today and were received with great excitement and joy. The girls are very, very happy about them and so are we. Just the thought of a good night's sleep seems too good to be true. I've noticed that it's easier for the girls to get up in the morning, because their quality of sleep has improved so much. A big thank you from us all."

Ridge & Partners team wins 2001 LionHeart shoot

The Ridge & Partners team, consisting of Richard Hand (Ridge), Gordon Mowatt (Wexas) and Rod Gould (J D Edwards), won the Annual LionHeart Clay Pigeon Shoot held at West Wycombe Shooting Ground in June 2001, with a total score of 243. Greg Nicholson of CB Hillier Parker won the prize for highest score of 48. The Royal Rugby's Agents team was second.

This popular event, sponsored this year by Phoenix Beard, Reid Lamden and Horfield Investment, attracted 95 guns and raised over £700 for LionHeart.

LionHeart is seeking additional sponsors for this increasingly popular event which will be held on 28 June 2002. Anyone wishing to set up sponsorship or take part in the competition should contact Chris Wall at LionHeart on **0845 6039057**.

"Just a short note to tell you that we are back from the holiday of a lifetime! I do not know how to convey the pleasure we have enjoyed for the last 2 weeks."

**Need help?
Want to help?**

Call our 24-hour helpline on

0845 6039057
(local rate)

LionHeart

FOR RICS MEMBERS AND
THEIR DEPENDANTS IN NEED

or visit our website at
www.lionheart.org.uk

"Thank you for your cheque. We felt overwhelmed by your generosity. It arrived a day after our washing machine broke down and we were delighted to be able to replace it."

Outstanding sponsorship by LionHeart London marathon runner

Peter Taylor of Easter Holdings, London raised a total sum of £12,833 for LionHeart and a similar amount for other charities. Taylor said: "LionHeart does some splendid work and I believe every chartered surveyor should support the charity."

The 2001 LionHeart team in the Flora London Marathon raised over £16,844 exclusively for LionHeart. Further proceeds have been raised for the MS Society, Ray Mouncey's Children's Home and Children's Liver Disease Foundation. The team wore running kits kindly provided by Reflec of Winsford, Cheshire.

Ian Mercer of Bruton Knowles in Wolverhampton, completed the course in 4 hours 15 mins; Dave Moxom of Barnfield Commercial Ltd in Exeter, 4 hours 50 mins; Dave Nicholls of Shipman Nicholls in Blackburn, 4 hours 54 mins; Scott Rossiter of Alder King in Exeter, 4 hours 12 mins; Peter Taylor of Easter Holdings in London, 3 hours 57 mins; William Togher of Countryside Residential Ltd in Leatherhead, 5 hours 10 mins.

David Larkin, Chairman of LionHeart said: "We very much appreciate the outstanding effort made by participants and the generosity of their sponsors."



Left to right: Peter Taylor of Easter Holdings presents David Larkin, chairman of LionHeart, with a sponsorship cheque for his entry in the 2001 London Marathon.

LionHeart has reserved 10 places in the 2003 London Marathon. Interested runners or sponsors should contact Chris Wall at LionHeart for further details on **0845 6039057** (local rate) or email her at cwall@lionheart.org.uk

"I hardly know where to begin thanking you so much for all the help you give me. I have just had a visit from your local steward and stressed my appreciation for all your help. The gas engineer had visited me and passed my boiler with full marks!! Something else to thank you for. Now with your super Christmas hamper I feel like a child with a visit from Father Christmas."

Help LionHeart claim £90,000 from the Inland Revenue

All members of the RICS who are UK taxpayers were invited to complete a Gift Aid declaration, enabling the charity to reclaim the tax paid on any individual donation that the member makes, increasing the value of their gift by 28%.

If all donors who gave £10 when paying their subscription were to make a Gift Aid declaration, income from this source would be increased by around £90,000 at no extra cost to the donors. So far only 12% of donors have made a Gift Aid declaration.

It is never too late to make your declaration by telephone or email. Contact the LionHeart office for further details tel **0845 6039057** or email info@lionheart.org.uk or visit our web site to make your declaration.

Higher rate tax payers can also claim back the balance of tax paid.

LionHeart brings more Christmas cheer

LionHeart, the charity for RICS members and their dependants in need, spent £22,000 on gifts to beneficiaries for Christmas 2001. David Larkin, Chairman of the Board of Trustees said:

"Over 65% of beneficiaries are of working age with families to support, whose lives have been dramatically changed by circumstances that could affect any one of us. The majority have long-term illness or disability, or are single parents and are dependent on State benefits which are significantly lower than their former incomes. We also help many elderly people and widows.

"Gifts and additional financial help at Christmas provides some of the extra comforts that most of us take for granted and ensures that they have a more enjoyable time than would otherwise have been possible.

"LionHeart, with the support of RICS members, really does make a difference to the lives of so many people not only at Christmas but also throughout the year."

RICS West Midlands Property Quiz wins award

Organisers of the RICS West Midlands Property Quiz have received the Worshipful Company of Chartered Surveyors' Award in recognition of their achievement in raising funds for LionHeart. The award was presented to Simon Farrant, of Phoenix Beard's Birmingham office, Chairman of the Organising Committee and Chairman of the RICS West Midlands Regional Board by Hugh Stebbing, Master of The Worshipful Company of Chartered Surveyors (2000/01).



Simon Farrant (right) receiving the award from Hugh Stebbing.

Golf Tournaments raise over £17,000

Golf events organised by RICS members at Richmond in Surrey, Blairgowrie in Scotland, Woodbrook Golf Club in the Republic of Ireland and Muxton, Telford and Shropshire continue to be extremely popular and are thoroughly enjoyed by the participants. Thanks to the participants, the hard work of the organisers and the support of major sponsors, £17,722 was raised for the charity from 2001 golf events. There is scope for similar events to be developed throughout the UK.

For further details see "Dates for your diary" on page 4 or visit the LionHeart web site at www.lionheart.org.uk

"Thank you so very much for the money you sent for myself, my husband and also the children. It has made Christmas brighter for all of us. We can now relax and enjoy the festive period. I appreciate the kindness shown to myself and my family, without which things would have been extremely difficult."

"My Fair Lady" charity performance

450 Chartered Surveyors, friends, colleagues and old boys of Prior Park School, Bath, attended a charity performance of "My Fair Lady", featuring the original Royal National Theatre cast at the Drury Lane Theatre on 15 December 2001. Tickets were sold to benefit Peter Minahan, aged 49, married with three children, who is severely disabled following a cerebral aneurysm in 1999. The initiative was organised by the Mini Fundraising Group and supported by Sir Cameron Mackintosh, an old boy of the school.

The event raised over £14,000. The Group aims to fund the adaptation of the garage at the family home in Truro so that Peter can receive the care he needs at home.

An amazing £29,000 has been raised so far and work is well under way. LionHeart is continuing to provide support and is assisting the family in other ways.



Left to right: Denbeigh Warwick (Internal winner of 2001 LHRT Surrey Golf Tournament), John Astill, Peter Moore (Managing Director of MacDonald and Company), Justin Hampshire, Andrew Herrington and Michael Minto.

"We are extremely grateful for your recent loan. It is such a delight to have windows which do not leak."

Summarised Accounts for the year ended 31 December 2001

These summarised accounts, which are not the charitable company's statutory accounts, may not contain sufficient information to allow for a full understanding of the financial affairs of the charity. For further information the full annual accounts, the Auditors' report on those accounts and the Trustees' Annual Report should be consulted; copies of these accounts can be obtained from the Chief Executive, LionHeart, Surveyor Court, Westwood Way, Coventry CV4 8BF.

Statement of Trustees

We confirm that the extracts are a summary of information relating to both the Statement of Financial Activities and Balance Sheet from the annual accounts. The annual accounts were approved at the Board of Trustees meeting on 21 March 2002 and will be submitted to the Charity Commission and Registrar of Companies. The Auditors' report as given on the full accounts was unqualified.

D J Larkin FRICS
Chairman, Board of Trustees

21 March 2002

Auditors' statement to the Trustees of LionHeart

We have examined the summarised financial statements set out on this page.

Respective responsibilities of trustees and auditors: You are responsible as trustees for the preparation of the summarised financial statements. We have agreed to report to you on their consistency with the full financial statements, on which we reported on 21 March 2002.

Basis of opinion: We have carried out the procedures we consider necessary to ascertain whether the summarised financial statements are consistent with the full financial statements from which they have been prepared.

Opinion: In our opinion the summarised financial statements are consistent with the full financial statements for the year ended 31 December 2001.

haysmacintyre
Chartered Accountants
Registered Auditors, London

21 March 2002

BALANCE SHEET	2001 TOTAL £000's	2000 TOTAL £000's
Fixed Assets		
Leasehold investment properties	722	645
Tangible fixed assets	20	17
Investments and short term deposits	8,185	9,367
	<u>8,927</u>	<u>10,029</u>
Current Assets	328	552
Creditors		
Amounts falling due within one year	(295)	(267)
Net Current Assets	33	285
Net Assets	<u>£8,960</u>	<u>£10,314</u>
Unrestricted Funds	<u>£8,960</u>	<u>£10,314</u>

STATEMENT OF FINANCIAL ACTIVITIES	2001 TOTAL £000's	2000 TOTAL £000's
INCOME AND EXPENDITURE		
Incoming Resources		
Donations and legacies	575	941
Activities to generate funds	264	338
Investment income and interest	353	335
Total Incoming Resources	<u>1,192</u>	<u>1,614</u>
Cost of generating funds	220	268
Net Incoming Resources Available for Charitable Application	<u>972</u>	<u>1,346</u>
Charitable Expenditure		
Grants payable	543	464
Support costs	319	272
Management and administration	92	85
Total Charitable Expenditure	<u>954</u>	<u>821</u>
Total Resources Expended	<u>1,174</u>	<u>1,089</u>
Net Incoming Resources	18	525
Other recognised gains and losses		
Gains and losses on investment assets		
Realised	(206)	(27)
Unrealised	(1,166)	(296)
	<u>(1,354)</u>	<u>202</u>
Balances brought forward	10,314	10,112
Balanced carried forward	<u>£8,960</u>	<u>£10,314</u>

Notice of AGM

The Annual General Meeting of LionHeart (The RICS Benevolent Fund Ltd) will be held on Thursday 13 June 2002 at 12 Great George Street, London SW1P 3AD at 12.30pm. Further details, which were published in the April edition of Chartered Surveyor Monthly, can be obtained from the Chief Executive, LionHeart, Surveyor Court, Westwood Way, Coventry CV4 8BF.