

OSCAR MONTGOMERY ENVIRONMENTAL FOUNDATION

England & Wales · Charity number 1190365

Details

Other names OMEF

Status Registered

Legal form CIO

Registered 2020-07-13

Register [View on the Charity Commission register](#)

Contact

Address Suite 2
Fairgate House
205 Kings Road
Tyseley
Birmingham
B11 2AA

Phone 07415028467

Email secretary@omef.org.uk

Website <https://omef.org.uk/>

Activities

Objects: THE OBJECTS OF THE CIO ARE: (1) TO PROMOTE FOR THE BENEFIT OF THE PUBLIC THE CONSERVATION, PROTECTION AND IMPROVEMENT OF THE PHYSICAL AND NATURAL ENVIRONMENT (INCLUDING THE MARINE ENVIRONMENT) OF THE UNITED KINGDOM OR THE WORLD THROUGH THE PROVISION OF SUPPORT FOR CONSERVATION PROJECTS IN SUCH WAYS AS THE TRUSTEES FROM TIME TO TIME MAY DETERMINE.(2) TO ADVANCE THE EDUCATION OF THE PUBLIC IN THE CONSERVATION, PROTECTION AND IMPROVEMENT OF THE PHYSICAL AND NATURAL ENVIRONMENT (INCLUDING THE MARINE ENVIRONMENT) IN SUCH WAYS AS THE TRUSTEES MAY FROM TIME TO TIME DETERMINE.

Activities: The charities two objectives are: 1. To promote the conservation, protection and improvement of the physical and natural environment. 2. To advance the education of the public in the conservation, protection and improvement of the physical and natural environment.

Classification

- **How:** Makes Grants To Individuals, Makes Grants To Organisations, Provides Advocacy/advice/information
- **What:** Education/training, Environment/conservation/heritage
- **Who:** The General Public/mankind

Geography

- Grenada
- Throughout England And Wales

Finances

Period end	Income	Expenditure	Assets	Employees
2024-12-31	£5,563	£808	-	-
2023-12-31	£14,324	£2,617	-	-
2022-12-31	£49,800	£81,425	-	-
2021-12-31	£56,323	£10,807	-	-

Trustees

Name	Role	Appointed
Simon Albrighton	Chair	2022-10-27
Dr Mary Montgomery		2026-02-05
Dr Sundeep Dhillon		2020-11-07
Hannah Limberger		2020-07-13

OSCAR MONTGOMERY ENVIRONMENTAL FOUNDATION

England & Wales - Charity number 1190365

Accounts

Trustees' Annual Report for the period

	Period start date				Period end date		
From	01	January	2024	To	31	December	202

Section A Reference and administration details

Charity name

Oscar Montgomery Environmental Foundation

Other names charity is known by

OMEF

Registered charity number (if any)

1190365

Charity's principal address

Suite 2	
Fairgate House	
205 Kings Road	
Tyseley	
Birmingham	
Postcode	B11 2AA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Simon ALBRIGHTON	Chair		
2	Hannah LIMBERGER	Secretary		
3	Dr Sundeep DHILLON MBE	Treasurer		

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Appointed by existing trustees following Charity Commission guidance 'Finding new trustees' updated 07 March 2024 https://www.gov.uk/government/publications/finding-new-trustees-cc30/finding-new-trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The charity uses Charity Commission resources: 'Charity trustee welcome pack' updated 01 October 2024
<https://www.gov.uk/government/publications/charity-trustee-welcome-pack/charity-trustee-welcome-pack>

Summary of the objects of the charity set out in its governing document

1. To promote the conservation, protection and improvement of the physical and natural environment.
2. To advance the education of the public in the conservation, protection and improvement of the physical and natural environment.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

The charity spent much of the funds raised since it was founded on sea turtle conservation projects in 2022.

In 2024 the charity's activities have concentrated on:

- completing branding, marketing, website & social media messaging
- fundraising – a modest increase in cash reserves (£4.7k)
- trying to identify smaller, UK based conservation projects, rather than funding a big project as we did in 2022

The charity trustees have complied with the duty in section 4 of the Charities Act 2006 to have due regard to the public benefit guidance published by the Charity Commission.

Whilst we have not made any grants this year, we have increased our social media messaging improving awareness of conservation.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.



Summary of the main achievements of the charity during the year

The charity has been active in volunteer recruitment and capacity-building, amplifying marine-conservation partner work (notably sea-turtle protection in Grenada), and steady awareness posts on Facebook/Instagram tied to ocean and biodiversity topics.

Our main fundraising activity was the Great North Swim on 07-9 June 2024. 14 Volunteers took part and this accounted for the majority of our fundraising in 2024.

Section E Financial review

Brief statement of the charity's policy on reserves

The charity has been consolidating our financial assets to a level where we can maintain a reserve and hopefully fund projects next year.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

None



Section F Other optional information

None

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Dr Sundeep DHILLON MBE	Hannah LIMBERGER
Position (eg Secretary, Chair, etc)	Treasurer	Secretary
Date	31 st October 2025	



Receipts and payments accounts

For the period from	Period start date 01/01/2024	To	Period end date 31/12/2024
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	5 563	-	-	5 563	14 324
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	5 563	-	-	5 563	14 324
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	5 563	-	-	5 563	14 324
A3 Payments					
Advertising and Marketing	550	-	-	550	2 617
Administration & Office Costs	258	-	-	258	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	808	-	-	808	2 617
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	808	-	-	808	2 617
Net of receipts/(payments)	4 755	-	-	4 755	11 707
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	25 598	-	-	25 598	13 891
Cash funds this year end	30 353	-	-	30 353	25 598

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	Co-Op Charity Bank Account	30 353	-	-
CCXX R1 accounts (SS)	1	-	-	-

	-	-	-
Total cash funds	30 353	-	-
<small>(agree balances with receipts and payments account(s))</small>	OK	OK	OK

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
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B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

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
	Dr Sundeep Dhillon MBE (Treasurer)	05-Nov-25

OSCAR MONTGOMERY ENVIRONMENTAL FOUNDATION

England & Wales - Charity number 1190365

Accounts



Trustees' Annual Report for the period

From	Period start date			To	Period end date		
	01	January	2023		31	December	2023

Section A Reference and administration details

Charity name

Oscar Montgomery Environmental Foundation

Other names charity is known by

OMEF

Registered charity number (if any)

1190365

Charity's principal address

Suite 2
 Fairgate House
 205 Kings Road
 Tyseley
 Birmingham
Postcode B11 2AA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Simon ALBRINGTON	Chair		
2	Hannah LIMBERGER	Secretary		
3	Dr Sundeep DHILLON MBE	Treasurer		

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

Section B Structure, governance and management

Description of the charity's trusts

Type of governing document (eg. trust deed, constitution)	Constitution
How the charity is constituted (eg. trust, association, company)	CIO
Trustee selection methods (eg. appointed by, elected by)	Appointed by existing trustees following Charity Commission guidance 'Finding new trustees' updated 07 March 2024 https://www.gov.uk/government/publications/finding-new-trustees-cc30/finding-new-trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity's organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees' consideration of major risks and the system and procedures to manage them.

The charity uses Charity Commission resources: 'Charity trustee welcome pack' updated 01 October 2024
<https://www.gov.uk/government/publications/charity-trustee-welcome-pack/charity-trustee-welcome-pack>

Summary of the objects of the charity set out in its governing document

1. To promote the conservation, protection and improvement of the physical and natural environment.
2. To advance the education of the public in the conservation, protection and improvement of the physical and natural environment.

The charity spent much of the funds raised since it was founded on sea turtle conservation projects in 2022.

In 2023 the charity's activities have concentrated on:

- refreshing branding, marketing, website and social media messaging
- fundraising - our cash nearly doubled from £13.9k to £25.6k

The charity trustees have complied with the duty in section 4 of the Charities Act 2006 to have due regard to the public benefit guidance published by the Charity Commission.

Whilst we have not made any grants this year, we have increased our social media messaging improving awareness of conservation.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.



Summary of the main achievements of the charity during the year

The charity has been active in fundraising and engaging with supporters, both individually and also as part of The Great North Swim

Section E Financial review

Brief statement of the charity's policy on reserves

The charity has been consolidating our financial assets to a level where we can maintain a reserve and hopefully fund projects next year.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:

- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

None



Section F Other optional information

None

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Dr Sundeep DHILLON MBE	Hannah LIMBERGER
Position (eg Secretary, Chair, etc)	Treasurer	Secretary

Date 31st October 2024



Receipts and payments accounts

For the period from	Period start date 01/01/2023	To	Period end date 31/12/2023
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	14,324	-	-	14,324	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	14,324	-	-	14,324	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	14,324	-	-	14,324	-
A3 Payments					
Advertising & Marketng	2,617	-	-	2,617	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	2,617	-	-	2,617	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	2,617	-	-	2,617	-
Net of receipts/(payments)	11,707	-	-	11,707	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	13,891	-	-	13,891	-
Cash funds this year end	25,598	-	-	25,598	-

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	Co-Op	25,598	-	-
CCXX R1 accounts (SS)	1	-	-	28/10/2024 -

	-	-	-
Total cash funds	25,598	-	-
(agree balances with receipts and payments account(s))	OK	OK	OK

	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
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B2 Other monetary assets

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

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
	Dr Sundeep Dhillon MBE (Treasurer)	28-Oct-24

OSCAR MONTGOMERY ENVIRONMENTAL FOUNDATION

England & Wales - Charity number 1190365

Accounts

Trustees' Annual Report for the period							
From	Period start date			To	Period end date		
	Day 01	Month January	Year 2022		Day 31	Month December	Year 2022

Section A Reference and administration details

Charity name	Oscar Montgomery Environmental Foundation
Other names charity is known by	OMEF
Registered charity number (if any)	1190365
Charity's principal address	Suite 2 Fairgate House 205 Kings Road
	Tyseley
	Birmingham
	Postcode B11 2AA

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Simon Albrington	Chair		
2	Hannah Limberger	Secretary		
3	Dr Sundeep Dhillon MBE	Treasurer		

Names of the trustees for the charity, if any, (for example, any custodian trustees)

Name	Dates acted if not for whole year

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Section B Structure, governance and management

Description of the charity's trusts

Type of governing document <small>(eg. trust deed, constitution)</small>	Constitution
How the charity is constituted <small>(eg. trust, association, company)</small>	CIO

Trustee selection methods (eg. appointed by, elected by) Appointed by existing trustees

Additional governance issues (Optional information)

You **may choose** to include additional information, where relevant, about:

- policies and procedures adopted for the induction and training of trustees;
- the charity’s organisational structure and any wider network with which the charity works;
- relationship with any related parties;
- trustees’ consideration of major risks and the system and procedures to manage them.

Section C Objectives and activities

Summary of the objects of the charity set out in its governing document

1. To promote the conservation, protection and improvement of the physical and natural environment.
 2. To advance the education of the public in the conservation, protection and improvement of the physical and natural environment.

Summary of the main activities undertaken for the public benefit in relation to these objects (include within this section the statutory declaration that trustees have had regard to the guidance issued by the Charity Commission on public benefit)

OMEF funded two conservation projects in the Caribbean.

The first provided funding for a young UK researcher to investigate turtles in Grenada.

The second project facilitated turtle rescue in Barbados through funding of a 'turtle hotline'.

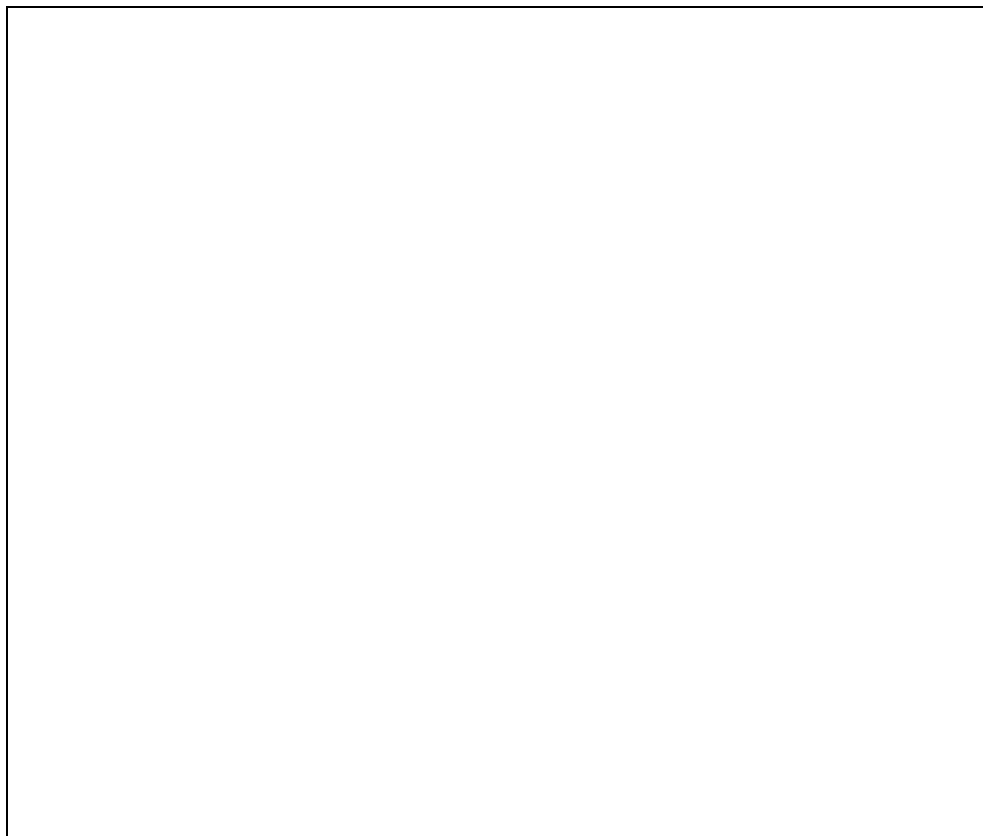
Together these projects worked synergistically to advance our charitable objectives.

All of the trustees of the Oscar Montgomery Environmental Foundation confirm that we have adhered to the guidance as issued by the Charity Commission on public benefit.

Additional details of objectives and activities (Optional information)

You **may choose** to include further statements, where relevant, about:

- policy on grantmaking;
- policy programme related investment;
- contribution made by volunteers.



Section D

Achievements and performance

Summary of the main achievements of the charity during the year

The main activity supported by OMEF was funding a MRed student at the University of Plymouth (Plymouth, U.K.).

Working with Grenada based marine conservation NGO Ocean Spirits Inc., and St. George's University (Grenada, West Indies). the early years researcher investigated the origin and migration corridors of Grenada's critically endangered hawksbill sea turtles (*Eretmochelys imbricata*) and endangered green sea turtles (*Chelonia mydas*).

The Charity also supported the Barbados Sea Turtle Project (BSTP) run by the University of the West Indies at Cave Hill. BSTP aims to restore local marine turtle populations to levels at which they can fulfil their ecological roles while still providing opportunities for sustainable use by the people of Barbados, and to support similar efforts in other countries of the Caribbean.

BSTP aims to recover marine turtle populations through the use of scientifically-sound conservation measures and monitoring programmes, and through the development and implementation of training, education and public awareness tools and activities that encourage the support and active participation of stakeholders.

The Barbados Sea Turtle Project emphasizes partnerships in achieving our goals. These partnerships are evident both at the national level (Government, non-governmental organizations and the tourism sector) and at the international level where the Project offers regional training workshops, maintaining a regional marine turtle tagging centre, and encouraging research and conservation in countries that share management responsibilities for our migratory sea turtle populations.

<http://www.barbadosseaturtles.org>

Section E Financial review

Brief statement of the charity's policy on reserves

We aim to maintain a reserve of at least 10% and ideally 20 % as a reserve.

Having spent a majority of funds raised to date, we are planning to invest in refreshing our website, improving our marketing and fundraising.

Details of any funds materially in deficit

None

Further financial review details (Optional information)

You **may choose** to include additional information, where relevant about:


- the charity's principal sources of funds (including any fundraising);
- how expenditure has supported the key objectives of the charity;
- investment policy and objectives including any ethical investment policy adopted.

Section F Other optional information

Section G Declaration

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
Full name(s)	Dr Sundeep Dhillon	
Position (eg Secretary, Chair, etc)	Treasurer	

Date 31 October 2023



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name Oscar Montgomery Foundation	No (if any) 1190365
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CC16a

Receipts and payments accounts

For the period from	Period start date 1/1/2022	To	Period end date 12/31/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	49,800	-	-	49,800	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	49,800	-	-	49,800	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	49,800	-	-	49,800	-
A3 Payments					
Pilot Programmes	81,425	-	-	81,425	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	81,425	-	-	81,425	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	81,425	-	-	81,425	-
Net of receipts/(payments)	- 31,625	-	-	- 31,625	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	45,516	-	-	45,516	-
Cash funds this year end	13,891	-	-	13,891	-

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	Co-Op	13,891	-	-
		-	-	-
		-	-	-
	Total cash funds	13,891	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
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 liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees	Signature	Print Name	Date of approval



Section A

Independent Examiner's Report

Report to the trustees/ members of

Charity Name
Oscar Montgomery Environmental Foundation

On accounts for the year ended

31 December 2022

Charity no (if any)

1190365

Set out on pages

1

(remember to include the page numbers of additional sheets)

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/12/2022.

Responsibilities and basis of report

As the charity trustees of the Trust, you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ("the Act").

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination, I have followed the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention (~~other than that disclosed below~~*) in connection with the examination which gives me cause to believe that in, any material respect:

- accounting records were not kept in accordance with section 130 of the Act or
- the accounts do not accord with the accounting records

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in order to enable a proper understanding of the accounts to be reached.

* Please delete the words in the brackets if they do not apply.

Signed:

Date:

20/10/2022

Name:

David Richardson ACA

Relevant professional qualification(s) or body (if any):

ICAEW Member 1606244
ACA

Address:

Unit 11 Holts Court

Threshers Bush

Harlow, Essex, CM17 0NS

Only complete if the examiner needs to highlight matters of concern (see CC32, Independent examination of charity accounts: directions and guidance for examiners).

Give here brief details of any items that the examiner wishes to disclose.

OSCAR MONTGOMERY ENVIRONMENTAL FOUNDATION

England & Wales - Charity number 1190365

Accounts

Trustees' annual report for the period



CHARITY COMMISSION
FOR ENGLAND AND WALES

Period start date Period end date

Charity name

Charity No (if any)

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	(1) To promote for the benefit of the public the conservation, protection and improvement of the physical and natural environment (including the marine environment) of the United Kingdom or the world through the provision of support for conservation projects in such ways as the trustees from time to time may determine (2) To advance the education of the public in the conservation, protection and improvement of the physical and natural environment (including the marine environment) in such ways as the trustees may from time to time determine.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	
Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	
Other		

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Achievements against objectives set	Para 1.41	
Performance of fundraising activities against objectives set	Para 1.41	
Investment performance against objectives	Para 1.41	
Other		

Financial Review

	SORP reference	
Review of the charity's financial position at the end of the period	Para 1.21	
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	
Amount of reserves held	Para 1.22	
Reasons for holding zero reserves	Para 1.22	
Details of fund materially in deficit	Para 1.24	
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
The charity's principal sources of funds (including any fundraising)	Para 1.47	
Investment policy and objectives including any social investment policy adopted	Para 1.46	
A description of the principal risks facing the charity	Para 1.46	
Other		

Structure, Governance and Management

Description of charity's trusts:	SORP reference	
Type of governing document (trust deed, royal charter)	Para 1.25	
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policies and procedures adopted for the induction and training of trustees	Para 1.51	
The charity's organisational structure and any wider network with which the charity works	Para 1.51	
Relationship with any related parties	Para 1.51	
Other		

Reference and Administrative details

Charity name	
Other name the charity uses	
Registered charity number	
Charity's principal address	

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Reference and Administrative details

(cont)

Corporate trustees – names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information

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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)		
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Full name(s)		
---------------------	--	--

Position (eg Secretary, Chair, etc)		
--	--	--

Date	
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CHARITY COMMISSION
FOR ENGLAND AND WALES

Oscar Montgomery Environmental Foundation 1190365

Receipts and payments accounts
For the period from 13-Jul-20 To 31-Dec-21

CC16a

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Donations	56,323	-	-	56,323	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	56,323	-	-	56,323	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	56,323	-	-	56,323	-
A3 Payments					
Pilot Programmes	10,807	-	-	10,807	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
Sub total	10,807	-	-	10,807	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	10,807	-	-	10,807	-
Net of receipts/(payments)	45,516	-	-	45,516	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	45,516	-	-	45,516	-

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	The Cooperative Bank	45,516	-	-
		-	-	-
		-	-	-
	Total cash funds	45,516	-	-
	(agree balances with receipts and payments account(s))	OK	OK	OK

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets	None	-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets	None		-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use	None		-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

Categories	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities	None		-	
			-	
			-	
			-	
			-	

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

Signature	Print Name	Date of approval