

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

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 (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

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

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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Receipts and payments accounts

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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.