

Trustees' Annual Report for the period						
From	Period start date			To	Period end date	
	01	January	2024		31	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 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)

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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 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 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

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 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

31st October 2025

CHARITY COMMISSION
FOR ENGLAND AND WALESCharity Name
Oscar Montgomery FoundationNo (if any)
1190365

Receipts and payments accounts

CC16a

For the period
fromPeriod start date
01/01/2024

To

Period end date
31/12/2024

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	-	-
(agree balances with receipts and payments account(s))	OK	OK	OK

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