



Blue Spirit

Charity registration number: 1201278

Trustees' Annual Report for the period

09/12/2022 to 05/04/2024

Legal Information

Charity information: 1201278

Structure: Registered Charity

Address: 5 Dilston Avenue, Hexham, Northumberland, NE46 1JE

Trustees during reporting period:

Jennifer Lees (known as Solen) Chair of Trustees

Nina Emett

Leda Dadkhah

Stuart Page

Lily-Mae Kroese

Jemma Willins

Stephen Castle

Christina Hawkes-Blackburn
(known as Amber)

Until June 2023

26 March 2024 onwards

Objectives and Activities

The objects of the CIO are:

To advance in life and relieve the needs of young people experiencing or at risk of experiencing poor mental health and/or from socially and economically disadvantaged backgrounds through:

- (a) The provision of recreational and leisure time activities in subsidized sailing experiences provided in the interest of social welfare, designed to improve their conditions of life;
- (b) Providing support and activities which develop their skills, capacities and capabilities to enable them to participate in society as mature and responsible individuals.

Main activities

Blue Spirit enabled sailing experiences for around 60 young people, mostly through community groups and voluntary organisations that work with young people in the North East of England.

Between May and August 2023, Blue Spirit reached 46 young people through several activities, provided by three sail training organisations:

- A weekend voyage with Ocean Youth Trust North (OYTN) on board James Cook
- A five-day voyage with OYTN on board James Cook
- An activity day with Derwent Reservoir Sailing Club (DRSC) where a group of 15 young people tried dinghy sailing and paddleboarding
- A 5-day voyage for an individual bursary recipient on board the Cirdan Sailing Trust's vessel Duet
- A five-day voyage with the Cirdan Trust on board Faramir

We ran a second activity day on 2nd April 2024 at DRSC for 14 young people.

Statement

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

Achievements and Performance

Research has shown that just being in blue spaces (like the sea) can have a positive effect on stress reduction and wellbeing and sailing itself also has multiple benefits, such as helping develop essential life skills and increasing self-confidence and resilience.

Feedback given by young people after their experiences consistently shows that young people are getting a lot out of sailing: learning new things such as working in a team and preparing and eating food together, feeling more relaxed and less anxious, creating bonds and having fun.

We gather feedback in different ways, most immediately by a post-sail questionnaire given to the young sailors. We also ask group leaders for their own assessment, and especially to tell us their observations of the young people during and after the experience. Some of our sail

training partners also have their own feedback form for group leaders, which they share with us.

Through maintaining relationships and continuing conversations with our partners, we know that a lasting impact has been felt by young sailors. They have found tools they need to progress and succeed, and make changes in their lives, through the time and space they have had to reflect, a new-found interest, or increased self-confidence.

The following case study illustrates Blue Spirit's impact:

15-year-old Danny has a condition known as 'brittle bones'. He has also suffered from anxiety, depression, and a lack of self-esteem. He often used his wheelchair, relied on painkillers and self-harmed.

Before his first sailing experience with Blue Spirit, he took part in activities with our partner Projects4Change, and began to take responsibility, help out, not use his wheelchair as much, and make new friends. He also developed a love of the outdoors. Although Projects4Change staff had observed these changes, they were still surprised when Danny jumped at the chance to go on a weekend residential voyage with Blue Spirit.

During the trip he pushed himself, testing his capabilities and surprising himself and others with his positive attitude. Since then, he has been surer of his purpose in life. He is setting up a support group for boys to talk about their mental health and do outdoor pursuits, and expressed his ambition to be a youth worker. His progress would not have been so radical without the life-changing experience of sailing.

The positive change in Danny is visible. He recovers from self-doubt more easily and now has forward momentum in his life now, an understanding of his challenges and new coping mechanisms.

Additional information (optional)

Achievements against objectives set

In 2023, we aimed to:

- spread our reach, to form and strengthen partnerships and to allow as many young people meeting our bursary criteria as possible to go sailing.
- raise enough funds to be able to operate during the current financial year
- finalise and screen our film In his Slipstream and make it available online.

We met our goals by:

- organizing sailing voyages for community groups and voluntary organisations that work with young people – both existing partners and new contacts. We began working with 2 sail training organisations – Derwent Reservoir Sailing Club and The Cirdan Trust – and continued working with OYTN
- submitting several funding applications, more than half of which were successful (although did not award the full amount requested)
- organising three successful screenings of our film and photo essay in the UK and they are now available to view online.

Financial Review

Review of the charity's financial position at the end of the period: £11,074 in account

Statement explaining the policy for holding reserves stating why they are held: As a relatively young charity run by volunteers, we do not yet have a reserves policy but we only implement activities that we know we can afford and we have very few overheads.

Amount of reserves held: £3,883

Structure, Governance and Management

Type of governing document: Constitution

How is the charity constituted? CIO - charitable incorporated organisation

Trustee selection and constitutional provisions

Eligibility for trusteeship

- (a) Every charity trustee must be a natural person.
- (b) No individual may be appointed as a charity trustee of the CIO:
 - if he or she is under the age of 16 years; or
 - if he or she would automatically cease to hold office under the provisions of clause [12 (1) (e)].
- (c) No one is entitled to act as a charity trustee whether on appointment or on any re-appointment until he or she has expressly acknowledged, in whatever way the charity trustees decide, his or her acceptance of the office of charity trustee.
- (d) At least one of the trustees of the CIO must be 18 years of age or over. If there is no trustee aged at least 18 years, the remaining trustees may only act to call a meeting of the charity trustees, or appoint a new charity trustee.

Number of charity trustees

- (e) There must be at least three charity trustees. If the number falls below this minimum, the remaining trustee or trustees may act only to call a meeting of the charity trustees, or appoint a new charity trustee.
- (f) The maximum number of charity trustees is 12. The charity trustees may not appoint any charity trustee if as a result the number of charity trustees would exceed the maximum.

First charity trustees

The first charity trustees are as follows, and are appointed for the following terms –

Jennifer Lees – for 4 years
Nina Emmett – for 3 years
Leda Dadkhah – for 3 years
Stuart Page – for 3 years
Lily Kroese – for 2 years
Stephen Castle – for 2 years
Jemma Willins – for 2 years

Appointment of charity trustees

Option 1

- (2) Apart from the first charity trustees, every trustee must be appointed for a term of three years by a resolution passed at a properly convened meeting of the charity trustees.

- (3) In selecting individuals for appointment as charity trustees, the charity trustees must have regard to the skills, knowledge and experience needed for the effective administration of the CIO.

Information for new charity trustees

The charity trustees will make available to each new charity trustee, on or before his or her first appointment:

- (a) a copy of the current version of this constitution; and
- (b) a copy of the CIO's latest Trustees' Annual Report and statement of accounts.

Retirement and removal of charity trustees

A charity trustee ceases to hold office if he or she:

- (c) retires by notifying the CIO in writing (but only if enough charity trustees will remain in office when the notice of resignation takes effect to form a quorum for meetings);
- (d) is absent without the permission of the charity trustees from all their meetings held within a period of six months and the trustees resolve that his or her office be vacated;
- (e) dies;
- (f) in the written opinion, given to the company, of a registered medical practitioner treating that person, has become physically or mentally incapable of acting as a director and may remain so for more than three months;
- (g) is disqualified from acting as a charity trustee by virtue of sections 178-180 of the Charities Act 2011 (or any statutory re-enactment or modification of that provision).
- (h) Any person retiring as a charity trustee is eligible for reappointment.

A charity trustee who has served for three consecutive terms may not be reappointed for a fourth consecutive term but may be reappointed after an interval of at least one year

Declarations

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

Signed on behalf of the charity's trustees

Signature(s)



Full name(s) Jennifer Anne Lees

Lily Mae Kroese

Position (eg Secretary, Chair of Trustees, Chair, etc)

Trustee

Date 26-11-2024



CHARITY COMMISSION
FOR ENGLAND AND WALES

BLUE SPIRIT

1201278

Receipts and payments accounts

CC16a

For the period
from

06/04/2023

To

05/04/2024

Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Funds held Externally to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Individual donations	7,825.17	6,137.00	-	13,962.17	-
Grants	9,000.00	12,554.00	-	21,554.00	-
Participant contributions	2,150.00	-	-	2,150.00	-
Fundraising / awareness-raising events	1,875.25	-	-	1,875.25	-
OYTN Budget	-	-	8,743.95	8,743.95	-
Other	0.01	-	-	0.01	-
	-	-	-	-	-
	-	-	-	-	-
Sub total (Gross income for AR)	20,850.43	18,691.00	8,743.95	48,285.38	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total receipts	20,850.43	18,691.00	8,743.95	48,285.38	-
A3 Payments					
Sailing provision for young people	14,108.05	4,536.95	-	18,645.00	-
Creative project (film & photo essay)	845.89	6,136.95	-	6,982.84	-
Printing (flyers & poster)	63.75	-	-	63.75	-
Event costs: photo printing	856.12	-	-	856.12	-
Event costs: Venue hire	1,008.00	-	-	1,008.00	-
VONNE membership	85.00	-	-	85.00	-
Website hosting & domain	-	330.24	-	330.24	-
OYTN Budget	-	496.05	8,743.95	9,240.00	-
	-	-	-	-	-
Sub total	16,966.81	11,500.19	8,743.95	37,210.95	-
A4 Asset and investment purchases. (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,966.81	11,500.19	8,743.95	37,210.95	-
Net of receipts/(payments)	3,883.62	7,190.81	-	11,074.43	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	3,883.62	7,190.81	-	11,074.43	-

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		3,883.62	7,190.81	-
		-	-	-
		-	-	-
	Total cash funds	3,883.62	7,190.81	-
	(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	Balance due for OYTN weekend voyage May	Restricted	1,980.00	
	Balance due for OYTN weekend voyage June	Restricted	1,980.00	
			-	
			-	
			-	

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

Signature


Print Name

Jennifer Lees (known as Solen)

Date of approval

08/04/2024



Section A

Independent Examiner's Report

Report to the trustees/
members of

Charity Name
Blue Spirit

On accounts for the year
ended

05/04/2024

Charity no
(if any)

1201278

Set out on pages

1 and 2

(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 **05/04/2024**

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:

24/11/2024

Name:

MRS SARAH POPPLETON-HALLBERG

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

N/A

Address:

THE OLD CHAPEL, LANEHEAD, TARSET

HEXHAM, NORTHUMBERLAND

NE48 1NT

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.



CHARITY COMMISSION
FOR ENGLAND AND WALES

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	-	-	-	-	-
	-	-	-	-	-
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Website hosting & domain	-	330.24	-	330.24	-
OYTN Budget	-	496.05	8,743.95	9,240.00	-
	-	-	-	-	-
Sub total	16,966.86	11,500.19	8,743.95	37,211.00	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
Sub total	-	-	-	-	-
Total payments	16,966.86	11,500.19	8,743.95	37,211.00	-
Net of receipts/(payments)	3,883.57	7,190.81	-	11,074.38	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
Cash funds this year end	3,883.57	7,190.81	-	11,074.38	-

24/11/24

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	External funds to nearest £
B1 Cash funds		3,883.57	7,190.81	-
		-	-	-
		-	-	-
	Total cash funds	3,883.57	7,190.81	-
	(agree balances with receipts and payments account(s))	OK	OK	OK
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
B3 Investment assets				
B4 Assets retained for the charity's own use				
B5 Liabilities				
Signed by one or two trustees on behalf of all the trustees		Print Name	Date of approval	
		Jennifer Lees (known as Solen)	08/04/2024	