

# FRIENDS of M.V.FREEDOM



Providing access to the sea for people living with disability

Encourage – Enjoy – Empower

Hon President: Councillor Kate Wheller

Hon. Chairman: Dirk Aldous Q.P.M.

Hon. Treasurer: Michael Garrett

Hon. Secretary: Steve Evans, [secretary@mvfreedom.co.uk](mailto:secretary@mvfreedom.co.uk)

## TRUSTEES CHARITY COMMISSION ANNUAL REPORT FOR THE PERIOD 1ST APRIL 2022 TO 31ST MARCH 2023

### Section A Reference and administration details

Charity name Friends of M.V.Freedom

Other names charity is known by M.V.Freedom

Registered charity number (if any) 283955

Charity's principal address

8, Bedford Terrace,	
Long Bredy,	
Dorchester	
Postcode	DT2 9HW

# FRIENDS of M.V.FREEDOM

## Names of the Trustees who manage the charity:-

- |    |                    |                      |
|----|--------------------|----------------------|
| 1. | Dirk Aldous Q.P.M. | Chairman and Skipper |
| 2. | Michael Garrett    | Treasurer            |
| 3. | Sheila Collins     | Fundraiser           |
| 4. | Meridy Phillips    | Fundraiser           |
| 5. | Keith Tyndall      | Bosun                |
| 6. | Martyn Simmons     | Co-opted             |
| 7. | Peter York         | Co-opted             |
| 8. | Gary Hepburn       | Co-opted             |

Names of the trustees for the charity, if any, (for example, any custodian trustees) - NONE

## Section B Structure, governance and management

### Description of the charity's trusts

- |                                 |   |
|---------------------------------|---|
| Type of governing document:     | Constitution (Amended and Adopted in 2020 and Charity Commission informed)  |
| How the Charity is constituted: | Association   |
| Trustee selection method:       | Trustees and co-opted trustees are appointed unless there are more applicants than vacancies in which case there is an election |

### Additional Governance issues (Optional Information)

During the specific year under review there were two resignations from the Trustee Committee. Rikk Butler and Janette Clubb which reduced the committee to five. During the reported year three members were appointed by the committee as co-opted trustees. The eight person Committee then also included a chairman/skipper, treasurer, fundraisers and bosun. The Hon. Secretary, himself a qualified skipper, supplies the administrative needs of the trustee group and in addition is responsible for the organisation and welfare of the other three charity skippers who are all MCA/RYA trained and qualified. He also leads a boat maintenance team with strong skills and experience, including two ex - naval engineers.

All the Charity's policies and procedures are being reviewed in light of the previous years experience, and where necessary improvements will be made to better meet the needs of the charity, its members and the law.



# FRIENDS of M.V.FREEDOM

## BUSINESS PLAN:

The Charity adopted a three year Business Plan in 2021, and it has now been redrafted to meet the perceived needs of the next three years. The trustees decided that in the interests of our passengers and crew selected Covid hygiene protections should remain in force on the boat for the time being. Despite these additional responsibilities all four of the planned Strategic Aims were either achieved or exceeded. Fundraising was continued and where a surplus above normal running costs is received, a set aside provision is now being made towards the provision of the next boat. The supporting priorities of the Marketing, Business, and Fundraising strategies are under constant review by the trustees.

The Charity has NO paid staff and the trustees, treasurer, skippers, fundraisers, maintenance team, and other volunteers all give their time and experience free of charge.

We do not at present keep records of the amounts of time volunteers commit to the charity but they are considerable, and the lifetime skills they possess are invaluable to the overall success of our work.

## INDUCTION TRAINING:-

Of the three new skippers inducted during the past year, two were unable to continue due to the demands of their full time roles. However, one new qualified MCA/RYA Yachtmaster (Off-shore) was recruited and three more have indicated an interest in joining the charity. As always new arrivals will receive a series of induction sessions to familiarise them with our new boat and our various anchoring locations, and the passenger handling policies used by the charity during our sea going trips. All crew members maintain a centrally held portfolio of competencies that demonstrates and evidences their ongoing training.

## STRATEGIC RISKS:-

The new Business Plan continues to identify four major risks - and procedures to manage the risks namely:-

1. Loss of boat through major breakdown - regular maintenance.
2. Loss of local support and finance through reputational damage - good communications.
3. Loss of suitable trustees or inability to recruit same - succession planning.
4. Loss of sufficient qualified skippers and crew - succession planning.



# FRIENDS of M.V.FREEDOM

## SECTION C – OBJECTIVES AND ACTIVITIES

### SUMMARY OF THE OBJECTS WITHIN THE GOVERNING DOCUMENT:-

"To assist in charitable works directed towards the relief of persons living with disability by the provision of a specially designed sea going motor vessel that enables them to participate in sea going activities on the Dorset Coast."

### MAIN ACTIVITIES FOR THE PUBLIC BENEFIT

The formal objective of the charity is to make it possible for people living with disability to have access to the sea by the provision of a specially designed boat that can deliver enjoyable but also therapeutic trips around Weymouth Bay, the Isle of Portland, Durdle Door, Lulworth Cove and the World Heritage site of the Dorset Jurassic Coast. The aim being wherever possible to leave our passengers with some lasting benefits from the experience. The Charity continues its formal collaboration with the MCA/RYA Green Blue environmental project, that enables charity members, our crews and passengers, to learn more about the environmental problems of the sea, and sea life. We can then in turn make a contribution towards the preservation of clean sea water in the interests of its inhabitants and our area. The MCA/RYA interactive educational resources are superb and we are encouraging our crews to engage with our passengers in their use. In addition, our new vessel has been equipped with smaller horsepower engines than previously, special engine room filters to prevent accidental spillage of oils and other contaminants into the sea. All our cleaning, and COVID required sanitisation fluids, are approved by the RYA as environmentally friendly.

### PUBLIC BENEFIT:-

The Trustees remain mindful of the Charity Commissioners requirement to have regard to their guidance on public benefit. The Charity trustees read the Charity Commission guidance PB1 and PB2 when preparing and reviewing their 3 year Business Plan.

This guidance is at the heart of all our charity's activities which are specifically designed and directed at assisting those members of the public who are living with disability to gain access to the sea, and whenever possible experience long-lasting benefits. This can be demonstrated in a range of differing outcomes from improved confidence, communication, friendships, relaxation, escape from isolation, and new skills such as basic navigation and helming the boat, greater knowledge of the seas environmental problems, and occasionally complete lifetime changes.

These simple pleasures, and in many cases the outstanding lasting benefits that a boat trip can provide for our passengers are evidenced regularly. The comments of carers, letters of thanks, testimonials, repeat visits and the enormous appreciation that the many differing communities of Weymouth and Portland demonstrate for MV Freedom, combined with the high level of financial support that is so willingly forthcoming from all quarters, and so often by those who can least afford it, remain an inspiration to the entire charity.



# FRIENDS of M.V.FREEDOM

## MAIN ACTIVITIES:-

During the 2022 - 2023 season our services to those living with disability were fully regained after the constraints of the Covid epidemic. A reformed fundraising group continued to meet regularly to monitor their strategy and identify new initiatives, and new recruits have brought extra skills and energy to the fundraising initiatives. Whilst the Charity benefitted considerably from successful corporate donation applications during 2019, the criteria for grant applications have continued to change during more recent years as many new initiatives emerged that are aimed at the growing financial crisis and the needs arising from it. This has created change in our fundraising priorities, but the Charity has continued to benefit from the loyal financial support raised from every element of our local communities, local authorities, businesses, hotels, clubs, individual residents and holiday makers. The main focus of our fundraising strategy remains to ensure that our programme continued to meet our maintenance and running costs of between £15k-£17k annually, and to provide for the growing demand for our enjoyable and empowering seagoing experiences. In future, we shall whenever possible "feed" a long term savings plan for the replacement of the new boat to ensure the longevity of the Charity.

## Additional details of objectives and activities:-

Our Business Plan had four strategic aims:-

- a) To increase the throughput of those persons living with disability on the sea going excursions and to engage with those wherever possible who are often excluded from such activities.  
**ACHIEVED AND EXCEEDED ALL PREVIOUS YEARS NUMBERS**
- b) To widen our client base to include all those who are living with disability from the age of 5 years upwards.  
**BEING ACHIEVED AND CONTINUING**
- c) To ensure our fundraising income is sufficient to maintain and cater for the maintenance and running costs of the new vessel, and to make provision for its eventual replacement.  
**ACHIEVED DESPITE CONTINUING SELECTED COVID PRECAUTIONS.**
- d) To equip our new vessel with the best possible facilities to ensure maximum enjoyment and therapeutic outcomes for our passengers and especially including their safety  
**ACHIEVED! - NEW BOAT DELIVERED 15TH APRIL, 2021.**

## VOLUNTEERS

- The massive and willing contribution of unpaid time, labour and experience from our volunteers is at the very heart of the charity, and without which nothing could be achieved. The Charity is so fortunate to have phenomenal community support from Weymouth and Portland in particular. The recognition and appreciation of the service provided by M.V. Freedom, is constantly apparent by the ever increasing level of bookings received. That together with the arrival of our new specially designed motor catamaran will ensure the longevity of the Charity for many years to come.



# FRIENDS of M.V.FREEDOM



## SECTION D - ACHIEVEMENTS AND PERFORMANCE:-



The honour of receiving the Queen's Award for Voluntary service on the 2nd June, 2021 in the Queen's Birthday Honours list was an enormous boost for the morale of our charity, its supporters and passengers. It was presented by the Lord Lieutenant Angus Campbell during a formal naming ceremony for our new boat on the 22nd September, 2021. Our charity has carried tens of thousands of delighted passengers over the years, and for this tremendous recognition on top of the delivery of a brand new boat for the 2021 season after nine years of fundraising, could not have come at a better time. It was a huge tribute to the hard work and commitment of our volunteers over many years, and particularly to the generous donations received from every element of the local communities and many corporate donors. We hope that all our supporters will feel able to share our delight and pride in this wonderful moment in the Charity's history!

Photographic memories.



[www.mvfreedom.co.uk](http://www.mvfreedom.co.uk) or Facebook.

## SUMMARY OF ADDITIONAL ACHIEVEMENTS:-

1. Visited by the High Sheriff of Dorset (September 2022) and awarded a certificate of appreciation.
2. Retained and increased the financial support from all elements of the community of the Weymouth and Portland areas and far beyond.
3. Increasing and maintaining the availability of a choice of trained volunteer crew to provide uninterrupted cover for two trips a day, for 5-6 days a week from April to October inclusive.
4. Continued to increase our passenger bookings beyond all previous records.(Over 3000).

# FRIENDS of M.V.FREEDOM

## SECTION E: FINANCIAL REVIEW

### BRIEF STATEMENT ON CHARITY RESERVE POLICY:-

The trustees have reviewed the continuing success of our fundraising activities and improved cash balances, and have again decided that we will seek to hold £20,000 in reserve, but available for allocation to any unforeseen or planned event. This figure remains slightly in excess of expenditure recorded in the last full operational year. We shall continue the charity's fundraising activities, and when possible deposit any surpluses in a reserve account as a long term savings plan towards the provision of the next boat to ensure the longevity of the charity.

### DETAILS OF ANY FUNDS MATERIALLY IN DEFICIT:-

None.

### FURTHER FINANCIAL REVIEW DETAILS:-

As we have NO paid staff, premises or road vehicles to maintain, all monies donated are used exclusively towards supporting the key objectives of the charity.

The Charity does not receive any statutory funding, and is reviewing its fundraising strategy to take account of the current financial and health crises. Future fundraising maybe more difficult for our usual donors and wide range of supporters e.g. passenger donations, almost 100 collection pots placed around Weymouth establishments, quiz nights, sponsored swims, paddle board events, Rotary club support and events, talks to various organisations, collaboration with other charities and the provision of our volunteers to assist them, as well as more specific donations from local businesses, public authorities and individuals.

See our website [www.myfreedom.co.uk](http://www.myfreedom.co.uk)



We are extremely fortunate to continue receiving the support of the Weymouth and Portland District Councils, through the present Mayor, and our President a past Mayor of Weymouth. The Charity is also grateful for the continuing support of the Weymouth Harbour Master.

All funds, that are not "earmarked" for specific purchases or needed for the day to day running of the charity are invested in secure interest bearing accounts, at the best rates available at the time.

## SECTION F:- OTHER OPTIONAL INFORMATION.

Weymouth and Portland are in the top 10% of areas of UK deprivation, with many other community problems within the population. Our voluntary service is a valuable addition to the statutory services, and in helping to reduce their costs. However, the increasing needs of those liv



## FRIENDS of M.V.FREEDOM

ing with disability, is growing, and the contribution that M.V. Freedom can make to enhancing their lives, will remain a considerable challenge for the foreseeable future. Recognising the different make up of our communities, and the needs and expectations of individuals within them can bring real benefits to all those concerned. Every community is made up of individuals and if M.V. Freedom is to improve the enjoyment and lives of those living with disability, then making every effort to meet their different needs is essential.

Sources:- Office of National Statistics - Gov.uk - English indices of multiple deprivation. Dorset County Council - Policy and Research Dept.

### SECTION G - DECLARATION:-

The trustees declare that they have approved the trustees report.

Signed on behalf of the trustees:-

Chairman

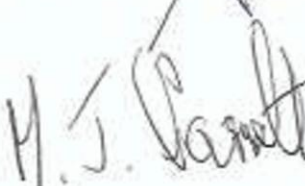
Full name: Dirk Aldous



(Signature)

Treasurer.

Full name: Michael Garrett



(Signature)

Date: 3rd July, 2023





CHARITY COMMISSION  
FOR ENGLAND AND WALES

Friends of MV Freedom

## Receipts and payments accounts

CC16a

For the period  
from

1st April 2022

To

31st March 2023

### 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 £
<b>A1 Receipts</b>					
Trip donations	11,625	-	-	11,625	9,184
Collection pots	1,648	-	-	1,648	1,070
One off donations	7,913	-	-	7,913	26,222
Fund raising events	8,710	-	-	8,710	2,076
HMRC tax relief on gift aid and fuel	-	-	-	-	8,939
Virgin money giving/IMC	3,426	-	-	3,426	5,007
Bank interest	1,264	-	-	1,264	175
PayPal	345	-	-	345	596
Grants & large donations	27,300	-	-	27,300	-
<b>Sub total (Gross income for AR)</b>	<b>62,231</b>	<b>-</b>	<b>-</b>	<b>62,231</b>	<b>54,169</b>
<b>A2 Asset and investment sales, (see table).</b>					
Sale of old boat	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total receipts</b>	<b>62,231</b>	<b>-</b>	<b>-</b>	<b>62,231</b>	<b>54,169</b>
<b>A3 Payments</b>					
Insurance	3,075	-	-	3,075	2,834
Harbour fees	959	-	-	959	1,096
Boat fuel	6,639	-	-	6,639	5,507
Boat running costs	5,889	-	-	5,889	7,688
Administration costs	1,075	-	-	1,075	917
Fund raising costs	-	-	-	-	332
Crew clothing	60	-	-	60	350
Petty cash	-	-	-	-	20
Legal costs	-	-	-	-	-
<b>Sub total</b>	<b>17,697</b>	<b>-</b>	<b>-</b>	<b>17,697</b>	<b>18,744</b>
<b>A4 Asset and investment purchases, (see table)</b>					
Stage payments New Boat	-	-	-	-	-
<b>Sub total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total payments</b>	<b>17,697</b>	<b>-</b>	<b>-</b>	<b>17,697</b>	<b>18,744</b>
<b>Net of receipts/(payments)</b>	<b>44,534</b>	<b>-</b>	<b>-</b>	<b>44,534</b>	<b>35,425</b>
<b>A5 Transfers between funds</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>A6 Cash funds last year end</b>	<b>91,426</b>	<b>-</b>	<b>-</b>	<b>91,426</b>	<b>-</b>
<b>Cash funds this year end</b>	<b>135,960</b>	<b>-</b>	<b>-</b>	<b>135,960</b>	<b>35,425</b>

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

## B1 Cash funds

Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
Barclays community account	7,537	-	-
Pety cash	26	-	-
Barclays investment account	100	-	-
Skepton Building Society	43,297	-	-
United Trust Bank charity bond	85,000	-	-
<b>Total cash funds</b>	<b>135,960</b>	<b>-</b>	<b>-</b>

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

## 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)
MV Freedom boat		-	280,000
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

## 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
	Mr D. W. Aldous	18-05-23
	Mr M. J. Garrett	18-05-2023





CHARITY COMMISSION  
FOR ENGLAND AND WALES

## Independent examiner's report on the accounts

### Section A

### Independent Examiner's Report

Report to the trustees/  
members of

Friends of M.V. Freedom

On accounts for the year  
ended

31 March 2023

Charity no  
(if any)

283955

Set out on pages

1 and 2

I report to the trustees on my examination of the accounts of the above charity ("the Trust") for the year ended 31/03/2023.

Responsibilities and  
basis of report

As the charity's trustees, 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 all 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 in connection with the examination (other than that disclosed below \*) which gives me cause to believe that in, any material respect:

- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:

29/05/2023

Name:

Rhys James Evans

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

Association of Chartered Certified Accountants (ACCA)

Address:

12 Castle Hill Road, Weymouth, Dorset, DT4 9NQ

# FRIENDS of M.V.FREEDOM

## Names of the Trustees who manage the charity:-

1.	Dirk Aldous Q.P.M.	Chairman and Skipper
2.	Michael Garrett	Treasurer
3.	Sheila Collins	Fundraiser
4.	Meridy Phillips	Fundraiser
5.	Keith Tyndall	Bosun
6.	Martyn Simmons	Co-opted
7.	Peter York	Co-opted
8.	Gary Hepburn	Co-opted

Names of the trustees for the charity, if any, (for example, any custodian trustees) - NONE

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Type of governing document:	Constitution (Amended and Adopted in 2020 and Charity Commission informed)
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CHARITY COMMISSION  
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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)
MV Freedom boat		-	280,000
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-
		-	-

## 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
	Mr D. W. Aldous	18-05-23
	Mr M. J. Garrett	18-05-2023





## Section A

## Independent Examiner's Report

Report to the trustees/  
members of

Friends of M.V. Freedom

On accounts for the year  
ended

31 March 2023

Charity no  
(if any)

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- the accounting records were not kept in accordance with section 130 of the Charities Act; or
- the accounts did not accord with the accounting records; or
- the accounts did not comply with the applicable requirements concerning the form and content of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair' view which is not a matter considered as part of an independent examination.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report 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:

29/05/2023

Name:

Rhys James Evans

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

Association of Chartered Certified Accountants (ACCA)

Address:

12 Castle Hill Road, Weymouth, Dorset, DT4 9NQ

# FRIENDS of M.V.FREEDOM

## Names of the Trustees who manage the charity:-

- |    |                    |                      |
|----|--------------------|----------------------|
| 1. | Dirk Aldous Q.P.M. | Chairman and Skipper |
| 2. | Michael Garrett    | Treasurer            |
| 3. | Sheila Collins     | Fundraiser           |
| 4. | Meridy Phillips    | Fundraiser           |
| 5. | Keith Tyndall      | Bosun                |
| 6. | Martyn Simmons     | Co-opted             |
| 7. | Peter York         | Co-opted             |
| 8. | Gary Hepburn       | Co-opted             |

Names of the trustees for the charity, if any, (for example, any custodian trustees) - NONE

## Section B Structure, governance and management

### Description of the charity's trusts

- |                                 |   |
|---------------------------------|---|
| Type of governing document:     | Constitution (Amended and Adopted in 2020 and Charity Commission informed)  |
| How the Charity is constituted: | Association   |
| Trustee selection method:       | Trustees and co-opted trustees are appointed unless there are more applicants than vacancies in which case there is an election |

### Additional Governance issues (Optional Information)

During the specific year under review there were two resignations from the Trustee Committee. Rikk Butler and Janette Clubb which reduced the committee to five. During the reported year three members were appointed by the committee as co-opted trustees. The eight person Committee then also included a chairman/skipper, treasurer, fundraisers and bosun. The Hon. Secretary, himself a qualified skipper, supplies the administrative needs of the trustee group and in addition is responsible for the organisation and welfare of the other three charity skippers who are all MCA/RYA trained and qualified. He also leads a boat maintenance team with strong skills and experience, including two ex - naval engineers.

All the Charity's policies and procedures are being reviewed in light of the previous years experience, and where necessary improvements will be made to better meet the needs of the charity, its members and the law.