



## GUIDANCE NOTES FOR ACQUIRING AND OPERATING YOUR OWN WHEELYBOAT

### Introduction

The Wheelyboat Trust is a registered charity dedicated to providing people of all ages who have sensory, learning and mobility impairments with independent access to waterborne activities (pleasure boating, nature watching, powerboating, angling) in wheelchair accessible Wheelyboats. We design, build, fund and supply Wheelyboats and so far 200 have been placed all over the UK. As far as we know, there is no other organisation doing this kind of work anywhere in Europe.

Our principal role is to help public waters, groups and organisations acquire Wheelyboats enabling them to provide the facility for their members, beneficiaries, service users and visitors, etc.

We want to help you achieve your aim of operating a Wheelyboat and these notes are designed to explain the process as clearly as possible.

### How do we acquire a Wheelyboat?

Wheelyboats can be purchased outright or, in certain circumstances, we can help fundraise to discount the cost. (Please note that we are able to help with the cost of purchasing the Wheelyboat and equipment, not any infrastructure or running costs).

The criteria for receiving our support are as follows:

- The Wheelyboat must be available for the general public to use, or, if an organisation is members-only it must principally benefit disabled people
- The Wheelyboat must provide a solution to a clearly identifiable need
- Infrastructure is in place to support the Wheelyboat's operation (there is more about this further on)
- The operator is a bona fide organisation (e.g. charity, CIC, limited company)
- There is a genuine financial need for our support

### What do we need to have in place to operate a Wheelyboat?

In order for a project to be viable, all of the following requirements need to be fulfilled:

- Somewhere for the boat to operate
- Someone to operate it
- Someone to take responsibility for it :
  - Insurance
  - Safe keeping
  - Maintenance and cleaning
  - Compliance (e.g. harbour licence)



- On-shore facilities:\*
- Accessible buildings
- Accessible loos
- Level parking close by

\*We understand that some projects may be at remote locations with facilities either rudimentary or non-existent. Beneficiaries of these projects will therefore be people who are likely to be more independent. If a case can be made and demand for the project can be demonstrated, we will consider supporting it.



It is important to stress that liability for the Wheelyboat, its insurance, upkeep, safe operation and security, rests entirely with the operator.

### **Do we have to be an established organisation to have a Wheelyboat?**

Most Wheelyboat operators are already established organisations when they approach us, but there are instances when groups have been set up with the specific aim of operating a Wheelyboat. For example, a group of friends who wanted a Wheelyboat on the River Tees at Stockton set up their own charitable organisation, the Tees Wheelyboats Club ([www.tees-wheelyboats.org.uk](http://www.tees-wheelyboats.org.uk)), as there was no existing organisation prepared to provide the facility. As a consequence we were able to offer our support and help fund the Wheelyboat's acquisition.

### **Which Wheelyboat model would best suit our needs?**

We build and supply four Wheelyboat models each suited to different waters and activities. We will help you decide which model best suits your needs along with the size and type of outboard plus fixtures, fittings and associated equipment, e.g seating, trailer, etc. Please refer to our website and brochures for more information about the different models of Wheelyboat available.

If you would like to see a Wheelyboat in operation we can arrange to bring one to you for a demonstration or put you in touch with your nearest Wheelyboat venue.

### **How is the project's budget determined?**

Once you have identified the most suitable model, the next step is to decide the outboard and equipment the Wheelyboat will need to be fitted out with. We will then be able to provide you with a formal quote. You will also need to consider any infrastructure costs necessary for the Wheelyboat's safe operation (e.g. boarding/disembarking access) and running costs (insurance, fuel, mooring fees, licence, etc.). We can help you put together a forecast for running costs if required.



Once the budget has been determined, we will need to establish whether you need our support and, if so, to what extent. In certain circumstances we can help by raising up to 50% of the project's cost but 20% to 30% is a more typical figure. Only the cost of building and equipping the Wheelyboat can be supported by our fundraising.

### **How does the fundraising work?**

Most funds raised by us come from charitable trusts and all funds used to support projects



have to be raised specifically for that purpose. Unfortunately at present we do not have a separate pot of funds we can use to support a project from the outset.

With your help we will produce a fundraising 'Case for Support', a four page document describing the project in detail: why the Wheelyboat is needed including evidence of need, who will benefit from it, who will run it, a project budget, proposed timescale, support from local organisations and the amount of funding needed to be raised. On your behalf we will be competing for funds with many other worthwhile causes so a compelling case must be created that funders want to support. The Case for Support will carry your logo as well as ours and will show the two organisations working together to fund the project. As such you are welcome to use the Case for Support for your own fundraising.

If you are a charity and are raising your own funds towards the project then our list of prospective donors needs to be shared with you and your list shared with us. The project is a joint-venture between you and us and as such each prospective donor must be eligible to be applied to by both parties. It is quite possible that some names on one party's list have current applications pending with, or are time-barred for reapplying by, the other party.

#### **When is the order to build the Wheelyboat placed?**

When the funds have been received or pledged the order for the Wheelyboat and equipment can be placed. If the project is proceeding without our support the time taken to deliver will be vastly reduced. If we need to support the project by raising funds, depending on the amount we are aiming to raise, it can take a year or more for the funds to come in. This timescale will need to be factored into your plans.

An order form setting out the price and any discount provided by funds that we have been able to raise will be sent to you for signing. Upon receipt of the signed order, we will instruct our boatbuilder to proceed and you will be given an estimated delivery date. At this point planning for the launch can begin.

With a clear order book delivery is typically about two months after order.

#### **How does VAT work?**

If not managed carefully VAT can add 20% to the cost of a project. With quite modest projects costing £25,000 before VAT that means an extra £5,000 to find.

If your organisation is VAT registered then VAT will not be a concern because any VAT charged by us on our sales invoice can be recovered in your next VAT return. If you are not VAT registered then there are steps that can be taken to reduce the VAT liability.

Funds coming from you to us to pay for the Wheelyboat cannot be used to reduce the VAT liability. However, funds provided by third parties can. This means that all funds raised by us and all funds raised by you can be used to offset the invoice total before VAT is calculated. However,



in order to qualify, third party funds must not pass through your hands but must come straight to us. Therefore, if you are fundraising towards the project it is important that you instruct your donors to send their payments directly to us. These funds will be set aside in their entirety towards your project and we are happy to make that guarantee to donors if necessary. It might be helpful to give an example of how this would look in practice:



Say a project costs £25,000 before VAT. We raise £5,000 towards it, you raise £5,000 (paid directly to us) and the balance of £15,000 comes from your own resources. Our invoice would be set out thus:

|  |                      |
|--|----------------------|
|  | £                    |
| Wheelyboat and equipment                                       | 25,000               |
| Less discount in the form of funding from The Wheelyboat Trust | <u>(10,000)</u>      |
|  | 15,000               |
| VAT @ 20%  | <u>3,000</u>         |
| Total  | <u><u>18,000</u></u> |

In this example a saving of £2,000 VAT is made compared to a potential VAT liability of £5,000 on the £25,000 invoice total if we had been unable to apply any discount using third party donations. If projects are fully funded by donations then it is quite feasible to save 100% of the VAT liability. HMRC has approved this approach and the description of the discount on the invoice satisfies their requirements.

If you are a registered charity and the Wheelyboat is being purchased for the personal and domestic use of disabled people then we can zero rate it for VAT. However, this is quite a tough requirement to pass – see VAT leaflet 701/7 Reliefs for Disabled People on [www.hmrc.gov.uk](http://www.hmrc.gov.uk). Individuals who are disabled who purchase a Wheelyboat for their own use will also benefit from zero rating.

**Can a Wheelyboat be borrowed rather than bought?**

Wheelyboats can either be sold to operators or supplied on a placement basis, i.e. a long term loan. What will determine a sale or a placement is the extent of third party funding that has paid for the Wheelyboat. If the operator has part-funded the project from their own resources then the transaction will almost certainly be a sale and means that ownership of the Wheelyboat and equipment will pass to the operator.



We will consider a placement if all the funding has come in from a third party (e.g. from a legacy). This means we supply a Wheelyboat to an operator but if the project fails the Wheelyboat can be recovered and found a new home thereby ensuring the donor’s wishes continue to be met. While there is no VAT on a placement, we may not always be able to recover VAT on the cost of building and equipping a placed Wheelyboat so this extra cost will need to be borne in mind.



A placed Wheelyboat's insurance, upkeep, safe operation and security is entirely the operator's liability, exactly the same as if they were the Wheelyboat's owners.

Whether a Wheelyboat is purchased or acquired on a placement basis, all the funds have to be raised first. We are currently unable to lend, lease, hire, etc. Wheelyboats except for very short periods, e.g. demonstrations.

#### **How do we insure our Wheelyboat?**

Insurance brokers IRCM have set up a specialist policy for Wheelyboat operators.

IRCM understand that Wheelyboats are specially designed for disabled people to use, unlike other insurers who equate disabled people in boats as a high risk activity. Their policy covers all aspects of Wheelyboat usage and is very competitive. For a quote contact Mark Elcocks on 01902 796793.

#### **How do we arrange a launch?**

Every new Wheelyboat launched is a huge opportunity to generate publicity for the project as well as the work our organisations do. We have a PR consultancy who work for us, Firebird PR, who will help you organise the launch and gain maximum publicity. Launches usually comprise a celebrity guest, a couple of short speeches, the naming of the Wheelyboat and cutting a ribbon across the bow door. Champagne can be sprayed or poured but bottle smashing is not recommended! A press release will be drafted and issued beforehand. All donors contributing to the project should be invited along with individuals and groups who will benefit from the project. It is always makes more of an occasion if food and refreshments are available. After the formal proceedings Wheelyboat trips with disabled people bring the project to life and normally make excellent photographs for the media.

#### **How do we ensure people know about the boat?**

The launch is a great way to raise awareness of the new facility, but it is important not to lose momentum. You will need to add the Wheelyboat to all your publicity materials so that anybody picking up a leaflet or visiting your website sees that there are specially designed facilities and opportunities for disabled people to participate. If you use social media make sure you issue regular reports on the Wheelyboat's usage and activities.

You will join the list of Wheelyboat venues on our website and in other publicity. Your launch will also feature in our annual newsletter and on the news pages on our website.

#### **What are the health and safety issues?**

All Wheelyboats are CE marked demonstrating they are built to the required international standard for design and construction as laid out by the Recreational Craft Directive (European Directive 94/25/EC as amended by Directive 2003/44/EC).

All Wheelyboats are issued with a comprehensive operator's manual that includes a Certificate of Conformity detailing the standards with which the



vessel's design and construction complies. It also stipulates the maximum safe load for passengers and cargo and maximum hp for the outboard. The manual also describes the safe operation of the Wheelyboat bearing in mind the special needs and potential vulnerability of its disabled users. It is essential that you read the manual and implement the procedures as described.



### **How will the Wheelyboat Trust keep track of our Wheelyboat?**

We undertake biennial condition and usage surveys of the Wheelyboat fleet. It would be much appreciated if you could keep a note of the total number of people using your Wheelyboat, how many are disabled, how many different people use the boat (i.e. counting each individual just once, not total footfall) and how often the Wheelyboat goes out. These statistics help the Trust make a good case to donors for funding to support future projects.

### **Is there a pricing policy for usage of the boats?**

Please bear in mind that the principal users of the Wheelyboat, people with mobility impairments and other disabilities, are more likely to have less disposable income than most other people. Ideally we would prefer there to be no charge for the hire of the Wheelyboat. However, we are well aware that operating a Wheelyboat incurs running costs and so we ask that the rate of any hire charge should be set to cover no more than these, particularly where use of the Wheelyboat generates other revenue such as the sale of fishing permits, the purchase of food and refreshments, etc. Where the Wheelyboat is used for trips and pleasure boating, you may wish to consider implementing a no-charge policy for disabled people but able-bodied people are charged at the normal rate.

### **How can we support the Trust?**

It would be hugely appreciated if Wheelyboat operators found ways to support us so that we can continue to bring these life-changing projects to more disabled people. One way we would like you to consider helping us is by organising a fundraising event, especially if we helped raise funds towards your Wheelyboat. The proceeds could be shared equally between you and us, for example.

Another way to help would be to set aside £1 or £2 from each daily hire as a contribution to our work. We rely entirely upon donations to fund the supply of Wheelyboats and if every operator contributed in this way much more could be done to help new venues and operators acquire Wheelyboats of their own.

You may well be called upon to demonstrate your Wheelyboat to potential venues and operators if you are local to the enquiry or if we are unable to pay them a visit.

If there are other ways you would like to offer your support, do please get in touch and let us know.

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#### THE WHEELYBOAT TRUST

##### PATRONS

Mr Jeremy Paxman Sir Max Hastings Sir Matthew Pinsent CBE Mr Allan Lamb Mr Charles Jardine The Rt Hon Lord Steel of Aikwood KT KBE PC  
Baroness Golding Mr Bernard Cribbins OBE Miss EFC Buchanan CVO

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