

Application guidance

February 2019



This document gives charities considering applying to the Step Change Fund the full information they need before submitting their Expression of Interest. Please read these guidelines carefully.



The Step Change Fund is held and managed by Oxfordshire Community Foundation, Charitable Incorporated Organisation No. 1151621, www.oxfordshire.org, 01865 798666.



Introduction

The Step Change Fund focuses on capacity building and strengthening of Oxfordshire's charitable sector.

The Step Change Fund aims to help high-quality social organisations make a step change to their business model that will create a more solid platform from which they can deliver services. The fund holders are particularly interested in projects that enable a 'step change' in financial terms.

Successful applicants will be allocated a project manager with experience of transformational projects, who will help you ensure key milestones and KPIs are met.

This fund does not offer core funding simply for the continuance of existing services. Grants will be given for projects that can demonstrate realistic plans for increasing reach and impact and for building longer-term resilience for the future.

Origins of the fund

Step Change has grown out of the Future-Building Fund, which launched as a pilot programme in May 2014 and was successfully completed in April 2016. The lessons learnt from the pilot have shaped Step Change's focus and methodology. A detailed report showing which projects have been funded by Future-Building/Step Change in the last few years can be found on the Oxfordshire Community Foundation (OCF) website.

Amounts available

The fund has over £1 million to distribute over the next four years.

- Grants in the first instance will be between £10,000 and £50,000
- There is the possibility of further funding up to £25,000 for follow-on projects.
- Total grants will be capped at £75,000, and will not normally be greater than 30% of the applicant's annual income, should this be less.

Who can apply?

The Step Change Fund accepts applications from registered charities, constituted groups or social enterprises/CICs that:

- Are based in Oxfordshire and operate primarily within the county
- Are focused on enhancing the quality of people's lives
- Have an annual income of not less than £75,000 and not more than £750,000
- Have been operating for three years or more
- Have outstanding leadership and the capacity to grow.

Exclusions

Grants will not be awarded to support:

- Statutory organisations, including schools
- Activities outside Oxfordshire
- Buses, mini buses or other community transport schemes
- Building costs, including access adaptations to buildings, except where these are essential to delivering the proposed step change
- Activities that are the statutory duty of the government or local authority.

If your project is of a different type, another grant option may be more suitable. Please have a look at the Oxfordshire Community Foundation website to help you decide.

How to apply

The Step Change Fund application is in two stages:

Stage 1: Expression of Interest (EoI) and health check

- The first step is to speak to the grants team at OCF at least two weeks before the closing date, who will help you decide if the Step Change Fund is right for you. Please call Annette or Simon on 01865 798666, Monday to Friday, 9am to 5pm, or email ocf@oxfordshire.org.
- If we believe your project would be eligible for Step Change funding, we will ask you to complete an Expression of Interest (EoI) form, to be submitted with your health check by the next closing date (see below). A copy of this form can be found for reference on the OCF website.
- A charity health check must be prepared by Oxfordshire Community and Voluntary Action (OCVA) and submitted alongside your EoI. Applicants should request a health check **no less than two weeks before the closing date** (shown below). OCVA will charge £100+VAT for completing the health check, to be paid by the applicant. Please contact John Hayes at john.hayes@ocva.org.uk or 01865 251946 for the health check and to discuss any help needed.
- The EoI, together with the health check and your latest annual report and accounts, should then be submitted by email to ocf@oxfordshire.org. The submission deadlines are listed on the OCF website. If your accounts are more than six months old, we will require a copy of your most recent management accounts.
- The grants panel will review the EoI form and, if you qualify, you will be invited to submit a Detailed Bid form. Applicants will be told of the panel's decision within five working days of the meeting.

TIP: Do not use a scatter-gun approach to describe your project. The grants panel is looking for well defined projects with clear outcomes that will deliver a sustainable step change.

Stage 2: Detailed Bid

- If your EoI is approved by the grants panel, you will be invited to complete a Detailed Bid form. This requires applicants to provide a more comprehensive rationale for their project, a project plan and a detailed budget. A copy of the form can be found on the OCF website for reference.
- These should again be submitted by email to OCF, and the applicant should prepare to present the bid **in person** to the next grants panel (see below).
- Each applicant, prior to this presentation, will be visited by a member of the grants panel, in order to discuss what the panel is looking for from the Detailed Bid.

- The grants panel will invite the applicant charity to present its Detailed Bid at its next meeting, following the bid's submission.
- Applicants will be told of the panel's decision within five working days of the meeting.

Help and support

- OCVA offers help with the completion of the EoI and the Detailed Bid, should this be required. The fees for such help will depend on the work involved and should be negotiated by the applicant.
- Charity Mentors offers short-term mentoring for charities. This service is free of charge. A mentor can help leaders take an overview, think through all the options and plan the best way forward. A first meeting with a mentor can be arranged without obligation. For more information visit www.charitymentors.co.uk or contact Roz Warren at info@charitymentors.co.uk.