Review of the Year

April 2021
About Step Change

The Step Change Fund was established in 2014 when a group of philanthropists in Oxfordshire recognised that many charitable organisations struggle to obtain funding to build their core capacity. A consequence is that some organisations ‘chase funding’ for new projects, without sustainable benefit to the charity or lasting impact. This contrasts with the commercial world, where investors look to build on proven success, avoiding the distraction of new projects unless strongly justified and adding value. The aim of the Step Change Fund therefore is to strengthen foundations of proven voluntary sector organisations, so that they can deliver more, to more people, more often.

The fund aims to support medium-sized social organisations (income between £75,000 and £750,000) that are already making a positive difference within the county. Successful applicants demonstrate outstanding leadership and the capacity to grow. The Step Change Panel considers the group’s social impact, its future potential and whether the amount of grant to be awarded will be sufficient to make a real impact.

Step Change is characterised by a rigorous application, support and monitoring process, which applicants tell us are beneficial beyond the funding itself. A project manager supports applicants through their bid to the panel, acts as an adviser and sounding board for the charity leader in setting and meeting Key Performance Indicators (KPIs), and reports back on progress and sustainability. Step Change continues to assess impact for a year after each project is completed.

Donors to Step Change understand and value the vital contribution to the community made by voluntary sector organisations. The fund gives donors a unique vehicle for combining their resources intelligently and making investments at a scale that reinforces good organisations for the long term. Donors are kept well informed about the operation of the fund throughout the year and at an annual dinner arranged by the panel. This communication gives donors confidence that their funds are being well used: to empower and strengthen excellent organisations.

To find out more visit www.oxfordshire.org/step-change-fund.
Chair’s report

April 2021

Last July I took over from Nigel Hamway as Chair of the Step Change Panel. Under Nigel’s six years of leadership the Step Change Fund has distributed over one million pounds in grants to Oxfordshire charities. The distribution of grants is central to the Panel’s role and it is to Nigel’s credit that under his leadership virtually all grants resulted in highly successful projects. I am sure all involved with the Step Change Fund will join me in thanking Nigel for his many years of dedication and wise leadership and wish him well for the future.

The Panel now comprises a healthy blend of old and new hands. Olga Senior and I are the most recent recruits having recently lost Michael McLintock to the call of his many other responsibilities.

Needless to say the last year has been uniquely difficult for the charitable sector. Charities have seen a surge in demand for their services while having their ability to respond severely constrained by government restrictions. This has undoubtably put a strain on the finances of many. Whilst being sympathetic to the plight of these charities, the Panel has taken the view that, with two minor exceptions, it is not our role to provide short term financial respite but to remain true to our mission of strengthening organisations for the long term. Short term funding in response to the pandemic has been provided to many charities by Oxfordshire Community Foundation with whom we have a close working relationship.

The services provided by the voluntary sector have never been so needed and I am proud that many Oxfordshire charities are now better positioned to deliver services as a result of Step Change grants. During the last year, the fund made grants to six new projects with a total value of £155,000.

Our grant to Riverside Counselling Service in a previous year is a good example of the transformative IT-based grants we have made recently:

“The impact of this grant has been just amazing and has enabled us to support more people across South Oxfordshire throughout the pandemic. I really don’t think we would have been able to do this without all of the digital changes we have been able to implement thanks to the Step Change grant.”

Amanda Collins of Riverside Counselling

The range of services currently supported by our active grants is revealing. Of these 23 projects, eight provide services for women and young children and six assist those with mental health challenges. Other areas served include rough sleeping, disability and debt advice. All these social needs are exacerbated by the pandemic while the delivery of charitable services is much more challenging under social distancing rules.

To give a snapshot of the progress of our active projects, we use a ‘traffic light’ system to identify those which are fully on track (green), have minor issues (orange) or are significantly off track (red). Despite the pandemic, when last reported in January, none of our active projects were classed red and only five were considered orange.

“The services provided by the voluntary sector have never been so needed and I am proud that many Oxfordshire charities are now better positioned to deliver services as a result of Step Change grants.”

Sandy Arbuthnot, Step Change Chair
No Step Change report would be complete without paying tribute to our project managers. These experienced volunteers are central in ensuring our grants go to the most deserving projects and that the funds are subsequently efficiently spent. With very few physical meetings being possible this liaison role has undoubtably become particularly challenging. Steven English continues to do an excellent job as the link between the Panel and the project managers and he has recently recruited five new volunteers to join his experienced team. Brief biographies of all project managers are included together with those of the Panel members at the end of this review. We are most grateful to Steven and his team for their vital contribution to the success of the Step Change Fund.

Of course, the Step Change success story would not be possible without the great generosity of our donors. This small group of philanthropists has allowed us to assist some of Oxfordshire’s most disadvantaged. With an undiminished demand for charitable services and our capacity to handle more projects, Step Change is keen to increase the scale of its grant making. We will continue to seek potential donors who may be interested in supporting the most deserving of Oxfordshire’s charities.

With some hope of a relaxation of social restrictions beginning to dawn, we can begin to think about the future with more optimism. While both the Panel and the project managers have got used to remote meetings, we all look forward to seeing each other face to face later in the year. The charities we support have adapted imaginatively to the lockdowns and will emerge stronger – particularly from their investment in IT. These difficult months may have provided the catalyst for accelerating step changes which otherwise would have taken much longer, and which now leave many organisations better able to serve their communities in the long term.

SANDY ARBUTHNOT
Chair, Step Change Grants Panel
“We aspire to be there for all survivors of sexual violence and abuse across the county. Step Change’s support has helped us to explore new ways of ensuring that our services are relevant and accessible to all, including under-represented and marginalised groups.”

*Lisa Ward, CEO, Oxfordshire Sexual Abuse and Rape Crisis Centre*
1. **Summary of approved projects in 2020–21**

Grants awarded in the past 12 months – £159,272 total

<table>
<thead>
<tr>
<th>Grant</th>
<th>KPIs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OXFORD PARENT INFANT PROJECT (OXPIP)</strong></td>
<td>Offers direct therapeutic mental health services to families in Oxfordshire</td>
</tr>
</tbody>
</table>
| £24,500 April 2020 | 1. Selection, recruitment and induction of a Training Manager who successfully passes their probation period  
2. Delivering and building upon the 2020/21 Training Delivery Plan by growing the trainer team (employed and freelance) and training service  
3. Facilitating a larger income stream which will extend OXPIP’s free/subsidised training offer to upskill more Oxfordshire frontline Early Years workers to support vulnerable families |
| **ARCHWAY FOUNDATION** | Supports and befriends those experiencing loneliness and isolation |
| £5,000 April 2020 (Grant III) | This grant complements Grant II, which equips volunteers to work with more challenging clients and to work in more remote areas. It meets the need for significant changes to both content and delivery because of COVID restrictions. KPIs are outlined in the next section. |
| **OXFORD AGAINST CUTTING** | Tackles female genital mutilation (FGM) and forced marriage of girls and women living in Oxfordshire and the Thames Valley |
| £29,815 July 2020 (Grant II) | 1. Within the first month: hire media communications manager, develop social media strategy, set up reporting tool, manage regular content across all platforms, set up advertising  
2. Within six months: new content created (marketing films etc), channel takeover initiative with young people  
3. End of 12 months: reach 5,000 followers; strong affiliation with five influencers; fundraising from activities in place and reaching target (self-funding of media communications activities) |
| **OXFORD AGAINST CUTTING** | Tackles female genital mutilation (FGM) and forced marriage of girls and women living in Oxfordshire and the Thames Valley |
| £3,000 July 2020 (Grant III) | This grant complements Grant I made in November 2019 (see below). |
| **OXFORD UNITED IN THE COMMUNITY** | Uses the power of football to inspire the people and communities of Oxfordshire to have positive aspirations for their futures |
| £30,337 July 2020 | 1. Initial ‘town spoke’ established in Banbury, engaging with 500 people per year across multiple age groups and social needs  
2. New impact measurement tool analysis shows improvements in healthy living, confidence and a reduction in anti-social behaviour in first town spoke  
3. Stakeholder and partner feedback  
4. First spoke creating an additional £12,000 p.a. of income-generating work with other agencies, access to national funding currently not open to local clubs etc  
5. Hub and spoke model with one town spoke fully self-funded by OUitC after end of year 1 of project, so can continue into year 2 |
OXFORD sexual abuse and rape crisis centre (OSARCC)

Supports women who have experienced sexual violence

£20,000 October 2020 (Grant IV)
To build on the previous OSARCC projects by enhancing the visibility, accessibility and relevance of OSARCC’s services

1. Diversity audit complete and schedule for implementing recommendations agreed
2. Analysis report of potential for online services to remove barriers for some marginalised groups complete
3. Free online training developed and delivered to at least eight groups working with marginalised and minoritised communities

OXFORD GATEHOUSE

Offers free support services for adults who are homeless, vulnerably housed, on low income and/or looking for company and community

£46,620 October 2020
To improve the internal structure of all the services delivered via a digital system that manages volunteers, clients and staff data better

1. Sourcing and tailoring a management system which meets the needs of the organisation and can be adapted to meet change
2. Staff and volunteers are competent and confident in using the monitoring system, which will lead to paperless working across the organisation
3. Management staff able to complete detailed and metric reporting and set up new activities

2. Other active projects

The following projects were funded in previous years and are still either receiving grant payments or within the one-year monitoring period.

OXFORD PARENT INFANT PROJECT (OXPIP)
Charity offering direct therapeutic mental health services to families in Oxfordshire

£50,000 April 2018 (Grant I)
To turn their parent–infant mental health and wellbeing training into a social enterprise, making the most of clinical commissioning opportunities

1. Staff capacity and succession planning – new staff in place
2. Programme development
3. Marketing, data, communications and sales

1. ACHIEVED: New staff in place. Needs assessments have been completed for 7 staff (up from 4–5 planned for).
2. ACHIEVED: Endorsement from the Association for Psychodynamic Practice and Counselling in Organisational Settings (APPCIOS) for all OXPIP courses. Completion of any of OXPIP courses will now count towards an individual clinician’s APPCIOS accreditation.
3. From August 2018 to July 2019, income from Training and Consultancy doubled, rising to £51.4k, compared to £25.4k for the same period in 2017–18. This success has been sustained.

Project completed April 2019 – outcomes monitored until April 2021
## Grant KPIs Achievements to date

**ARK T CENTRE**
A charity that uses the arts to empower vulnerable people, such as young women at risk of sexual exploitation

### £50,000 Oct 2018
Diversifying the charity’s income from hires of a new community meeting venue in Cowley

1. By 2020, at least 30k raised through the NewRiver regeneration project in Templars Square, for Ark T’s community cohesion programme
2. New CRM database installed to manage venue bookings
3. New media images of both spaces online and updated
4. Updated mailing list for all previous and existing venue hirers across the sites

The venue manager was appointed and a full marketing plan completed. Market research was carried out into how the centre should best advertise itself and the management team were given training to boost their marketing skills (graphic design and social media). New marketing collateral was produced and distributed to previous and existing hirers, alongside a better support package for hirers. A new CRM system is live. A total of £75k was raised from venue hire up to April 2020, which was at 70% usage. However, the COVID-19 crisis meant the venue had to close for large parts of 2020, and Ark T is facing a shortfall of hire income of over £50k. Despite this, they have built new networks during the pandemic and a majority of hirers are committed to returning as soon as possible.

**ANJALI DANCE COMPANY**
A touring company of learning-disabled dancers

### £25,322 Apr 2019 (Grant II)
Makes the most of Anjali’s extensive knowledge and experience by creating packages for training and consultancy to create a new funding stream

1. Documentation used by 100 dance artists by 2022
2. Income of £25K from distribution of materials by end 2022
3. Documentation used for in-house training and induction of Anjali team members and practitioners

This was a challenging project in terms of workload, even before COVID. The team has succeeded and the project is on track to complete this month, with an Operations Manual completed; an online resources website with the web designer and soon to be ready for testing with a group of selected partners/colleagues; a Marketing plan completed; and a business plan almost complete, including a plan for succession.

**RIVERSIDE COUNSELLING SERVICE**
Supports the mental health and well-being of adults and young people with a wide range of mental health issues

### £67,494 Jun 2019
Deploys digital technology to enable the charity to work more effectively and efficiently

1. Improved efficiency – 20% reduction of time clinical staff spend on administrative tasks
2. Improved impact reporting – production of monthly internal analysis reports to support clinical management, management of service or reporting required by external donors
3. Increased income generation – 25% of fundraising income generated by new donors

The Step Change Fund provided Riverside with the funds to introduce a safe and secure digital platform, Counsel365, to continue their work to provide important services to the local area. The impact this had for the team cannot be overestimated; to have all data easily accessible to everyone, with new processes introduced to streamline the client journey from point of entry via an online form accessed on the website, to completion of counselling and data reporting. During the project, the service faced the challenge of moving all their counselling sessions from face-to-face to online and without the Office 365 platform which was installed in the first part of the project, Riverside would not have been able to manage and retain their level of clients.
<table>
<thead>
<tr>
<th>Grant</th>
<th>KPIs</th>
<th>Achievements to date</th>
</tr>
</thead>
</table>
| **CITIZENS ADVICE OXFORD**

<table>
<thead>
<tr>
<th>£46,764 Jul 2019</th>
<th>Helps local people overcome problems that negatively affect their lives and wellbeing</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Grant</strong></td>
<td><strong>KPIs</strong></td>
</tr>
<tr>
<td><strong>Citizens Advice Oxford</strong></td>
<td>Helps local people overcome problems that negatively affect their lives and wellbeing</td>
</tr>
<tr>
<td><strong>Grant</strong></td>
<td><strong>KPIs</strong></td>
</tr>
<tr>
<td>£46,764 Jul 2019</td>
<td>Helps local people overcome problems that negatively affect their lives and wellbeing</td>
</tr>
<tr>
<td><strong>AGNES SMITH ADVICE CENTRE</strong></td>
<td>Provides support and advice to the Blackbird Leys community</td>
</tr>
<tr>
<td><strong>Grant</strong></td>
<td><strong>KPIs</strong></td>
</tr>
<tr>
<td>£25,299 Sept 2019 (Grant II)</td>
<td>Provides support and advice to the Blackbird Leys community</td>
</tr>
<tr>
<td><strong>Oxfordshire Sexual Abuse and Rape Crisis Centre</strong></td>
<td>Provides support and advice to the Blackbird Leys community</td>
</tr>
<tr>
<td><strong>Grant</strong></td>
<td><strong>KPIs</strong></td>
</tr>
<tr>
<td>£15,000 Dec 2019 (Grant III)</td>
<td>Provides support and advice to the Blackbird Leys community</td>
</tr>
<tr>
<td><strong>Grant</strong></td>
<td><strong>KPIs</strong></td>
</tr>
<tr>
<td>£15,000 Dec 2019 (Grant III)</td>
<td>Provides support and advice to the Blackbird Leys community</td>
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<tr>
<td>Grant</td>
<td>KPIs</td>
</tr>
<tr>
<td>-------</td>
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</tbody>
</table>
| RAW WORKSHOP | Provides training and employment for those with disabilities, learning impairments and other disadvantages that are a barrier to employment | **£50,000 June 2018** (Grant II)  
To deliver gardening and landscaping services, training and employing people with mental health difficulties in the enterprise  
1. Social impact hours: number of people engaging in both the main service and the gardens projects to grow quarter on quarter  
2. Financial: income yr 1: £70–£80k; yr 2: £95k; yr 3: £110k  
3. New customer acquisition (1 x new corporate customer per year) and subsequent growth in social impact  
The Step Change funding was used to purchase a van and equipment as well as to employ a team leader. RAW went on to win grounds maintenance contracts for 100 properties for corporate, charity and private clients. Before COVID lockdowns RAW was averaging 365 impact hours per month, which was a 326% increase on their targets. However, lockdowns have had a negative affect as staff were furloughed and the business is being rebuilt. |

Planned completion date: June 2021

| COGGE HERITAGE TRUST | House and farm in Witney where families can learn about the past | **£49,360 April 2018**  
To move Cogges Manor Farm from a purely income-generating visitor attraction to being focused as much on supporting the societal and welfare needs of the local community  
1. Volunteer numbers increase from 60 to 250 and will be sustained; at least 5% of volunteers class themselves as disabled; people with mental health issues form at least 10% of volunteers  
2. 45 new opportunities to volunteer, equating to a £24,000 contribution  
3. Three volunteers receive disability training and instruct an additional 50 others  
4. A social impact evaluation toolkit is purchased and an evaluation strategy implemented  
5. Work with four other new partners to establish wider volunteer recruitment pool; at least one active partner relationship for each target audience  
6. Partnership accounts for 50% of volunteer training and support  
The grant included a refurbishment project to the premises to make them suitable for volunteers, which was delayed at the start of the pandemic but has since been completed. In January 2020 the project was progressing well, with key project management and volunteer coordinator roles recruited in order to deliver the KPIs. Despite all staff having to be furloughed due to the pandemic, Cogges were able to recruit volunteers with mental and physical disabilities, as well as a cohort of young people not in education, employment or training, who then helped with the refurbishment work when restrictions allowed. New staff have received mental health support training and are equipped to carry out a further volunteer drive. A Forest School for low-income families is due to start when restrictions allow. |

Planned completion date: April 2021

| OXFORD AGAINST CUTTING | Tackles female genital mutilation (FGM) and forced marriage of girls and women living in Oxfordshire and the Thames Valley | **£40,000 Nov 2019** (Grant I)  
To increase coverage for the charity's anti-FGM message, and create an income from private schools; conduct research into the possible value of engaging a social influencer to promote the message and raise funds  
1. STRUCTURAL STRIDES: Schools Coordinator recruited; 3–5 new facilitators; marketing literature created and printed; Social Media Influencer/s research project  
2. FINANCIAL STRIDES: good – 4 private schools book training in yr 1 and 5 in yr 2; really good – 6 private schools book training in yr 1 and 7 in yr 2; great – 8 private schools book training in yr 1 and 10 in yr 2  
3. SOCIAL CHANGE STRIDES: workshops reach schools with significant numbers of students from communities affected by honour-based abuse (HBA) and FGM, and body image workshops reach significant numbers of girls  
Five new facilitators joined the team by July 2020, and 10 new bookings with private schools by December 2021. FGM and HBA workshops were developed, but their delivery was suspended during the two lockdown school closures. OAC is prepared for post-lockdown times, putting their presentations skills for facilitators online, and creating a feedback system for schools. In addition, with the changing landscape and significant power of social media, they have developed a second Step Change project to reach schools, young people and communities with a Social Media Communications Coordinator. |

Planned completion date: February 2022
<table>
<thead>
<tr>
<th>Grant</th>
<th>KPIs</th>
<th>Achievements to date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARCHWAY FOUNDATION</td>
<td>Supports and befriends those experiencing loneliness and isolation</td>
<td>All KPIs were being met or exceeded prior to lockdown 1, after which significant changes were made to both content and delivery of higher-level training because of the COVID restrictions. However, the pandemic did mean that all staff had to be redeployed towards moving the organisation’s services online, resulting in a three-month delay to the project’s overall end date. 87 volunteers have now been trained and 27 new volunteers recruited.</td>
</tr>
<tr>
<td>£43,388 Jan 2020 (Grant II)</td>
<td>To equip volunteers to work with more challenging clients and to work in more remote areas</td>
<td>1. 40 existing volunteers completed higher-level training&lt;br&gt;2. 10 Friends (service users) living in outlying areas and/or with complex needs (14) will have been matched with a trained volunteer&lt;br&gt;3. 24 new volunteers will have been recruited and received induction, initial and higher training&lt;br&gt;4. Impact measurement tool analysis will show reduced loneliness, improved social connectedness and wellbeing</td>
</tr>
<tr>
<td></td>
<td>Planned completion date: May 2022</td>
<td></td>
</tr>
<tr>
<td>BRIDEWELL ORGANIC GARDENS</td>
<td>Uses gardening to work alongside people who have experienced serious mental health issues</td>
<td>Building work started on time but was delayed by the pandemic. This is now complete and office staff have been moved to the new premises. The panel awaits the end of grant report showing the impact this has had on resources and outgoings, which will be monitored for a year after the end of the project.</td>
</tr>
<tr>
<td>£71,586 Jan 2020</td>
<td>To increase time with users of the charity’s facilities by building new offices in the same area as the gardens, and reducing rental outgoings</td>
<td>1. Service utilisation: number of available places allocated (target 95%); meets strategic objective to increase impact&lt;br&gt;2. Outcomes maintained or improved ie i) no ongoing disruption to service as a result; ii) outcomes maintained for larger number of beneficiaries; meets strategic objective to increase impact&lt;br&gt;3. £5,800 of annual operating costs: 50% saved, 50% reinvested; office rental costs (£483 p/m) invested in team training; meets strategic objective to work towards sustainability&lt;br&gt;4. Staff resource released: as reported by staff and observed by Garden Manager and Director; 6 days per year for Garden Manager available for training; meets strategic objective to increase impact and work towards sustainability</td>
</tr>
<tr>
<td></td>
<td>Planned completion date: April 2021</td>
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<tr>
<td>HEADWAY</td>
<td>Provides support to anyone in the county affected by an acquired brain injury</td>
<td>The CRM is fully delivered and providing more streamlined ways of tracking client engagement, eliminating separate spreadsheets and paper records. The system allows managers to very easily track the work outputs of individual staff/teams/departments/and the organisation as a whole and has prompts that ensure ALL relevant and required data is entered and also actions are acted upon within set time frames. In addition, the tracking of client support hours, sessions and associated financial information allows for far more accurate records of work completed and quicker invoicing.</td>
</tr>
<tr>
<td>£47,673 Jan 2020</td>
<td>To improve clients’ experiences and related outcomes of those people that the charity serves using an engaging, efficient new CRM system</td>
<td>1. All front-line staff will be actively using the system in the field therefore reducing office visits by 80%&lt;br&gt;2. System is fully integrated into Headway Oxfordshire’s process and procedure, including accessibility for service users and carers – reducing the need for paper records by up to 80%&lt;br&gt;3. Financial systems are fully integrated, reducing manual entry by 16 hours per month</td>
</tr>
<tr>
<td></td>
<td>Planned completion date: October 2021</td>
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</tbody>
</table>
HOME-START OXFORD

**Grant:** £57,380 Jan 2020

**Supports parents with young children who are suffering mental health difficulties and are struggling to manage their children’s behaviour**

**KPIs:**
- Successful implementation of CRM system, website and online capabilities to support expansion of family support from 315 children in 2018/19 to over 500 p.a. in two years
- Increase volunteer numbers from 38 to 60 over two years, through online access and expanded communications
- Increase unrestricted income from £50k to £75k p.a. by expanding the donor base and supporter communications

**Achievements to date:**
- The CRM is fully implemented, data transfer is complete, and the system is supporting online referrals. Volunteering opportunities are managed via online web forms and training programmes for new recruits are in progress. The recruited Communications Manager has made a huge difference to Home Start’s brand awareness and the increase in the inflow of unrestricted funds has already surpassed plan targets. The project has delivered real benefits to Home-Start just at the right time when new ways of contacting families in need had to be developed during the pandemic.

Planned completion date: April 2022

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**Analysis of successful applicants**

<table>
<thead>
<tr>
<th>Category</th>
<th>2020-21</th>
<th>All Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social justice and inequality</td>
<td>3</td>
<td>10</td>
</tr>
<tr>
<td>Community cohesion</td>
<td>1</td>
<td>6</td>
</tr>
<tr>
<td>Life skills and employability</td>
<td>0</td>
<td>12</td>
</tr>
<tr>
<td>Mental and physical health</td>
<td>3</td>
<td>20</td>
</tr>
</tbody>
</table>

A Full Grants Summary listing all historic projects and their outcomes is available at [www.oxfordshire.org/step-change](http://www.oxfordshire.org/step-change).

The chart that follows describes the successful bidders and their projects since May 2014.
3. Financial summary as at March 2021

As at 31st January 2021 we had £1.15m available for future grants, almost exactly the same sum as last year. As a result of the generous support from our donors we have commitments which, at our forecast level of grant giving, will keep the fund active well into 2024.

Over the past reporting period, influenced heavily by the COVID pandemic, grant awarding has declined as charities struggle with financial sustainability as well as defining what a ‘Step Change’ is in the current situation. In addition, almost inevitably, interim payments on existing projects have also slowed, particularly those relating to construction and staff recruitment.

As regards the future, we believe that there is likely to be substantially increased demand for charitable services. Step Change now has capacity to handle more projects and is keen to increase the scale of its grant-making to suitable applicants. Therefore, we continue to seek potential donors who are interested in strengthening the foundations of good charities and wish to join the Step Change fund.

<table>
<thead>
<tr>
<th>Since inception</th>
<th>Funds out</th>
<th>Funds in</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funds received from donors, including Gift Aid</td>
<td>£2,595,592</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less contribution to OCF</td>
<td>£125,044</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net available for grants</td>
<td></td>
<td>£2,470,548</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projects completed</td>
<td>£1,088,174</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current projects – grants given to date</td>
<td>£373,175</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL GRANTS GIVEN TO 31/01/21</td>
<td>£1,461,349</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash balance as at 31/01/21</td>
<td>£1,009,199</td>
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<tr>
<td>Future commitments on current projects</td>
<td>£193,440</td>
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</tr>
<tr>
<td>Cash available for new projects</td>
<td></td>
<td>£815,759</td>
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<tr>
<td>Future pledges of donations (net of contribution to OCF)</td>
<td>£333,640</td>
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<tr>
<td>Forecast total cash available for future projects</td>
<td></td>
<td>£1,149,399</td>
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</table>

“With Step Change funding, we have been able to expand our specialist facilitation team and our reach into schools. We also have a new approach to advocacy via social media which was a top priority during the pandemic.”

Kate Agha, CEO, Oxford Against Cutting

Pictured: Rubie Marie, a new Anti-Honour-Based Abuse Facilitator and Social Justice Influencer for Oxford Against Cutting. Rubie survived being forced into marriage at the age of 15 and is a high-profile activist in the UK.
4. Introducing two new project managers

Tahmina Sultana

I volunteered for Step Change to help charities that are making changes to people’s lives. I believe I can support charities to reach their goals by encouraging them to think of their business strategies, set realistic targets, identify KPIs and achieve key milestones.

In my opinion Step Change is a light of hope for the charities, supporting them to bring changes to the community. Step Change helps charities to improve their performance by providing strong guidance and ensures the projects are sustainable, and I feel that, by working with Step Change, I am making a real impact on the community.

I come from a diverse and multi-cultural background and would like to share my skills, knowledge, and experience in Step Change projects with the aim of delivering more value. As a people person and a good team player, I can help charities in establishing a clear plan of action with KPIs and milestones that enable them to move forward with confidence.

Since I have a good business development and public services background, I have experience in stakeholder management, customer service, prioritising tasks, reducing waste and delivering projects. I believe in continuous and sustainable improvement with targeted project delivery. My interest in networking, change management and agile project management will help drive the projects to success.

Gary Gibbs

Having just completed a fixed-term contract at the University of Oxford, I was looking for something new. After a varied career managing and implementing innovation from chemicals to chocolate bars, I am now in the fortunate position of being able to choose what I want to dedicate my time to. I am now wanting to spend more of my time to benefit others in the community.

It was fortunate that Step Change were looking for new project managers at just the time I was looking for something new, and it was a great fit to my skills and experience. I had a discussion with Steven, who coordinates the project managers for Step Change, I was impressed by the way Step Change is organised and the focus on delivering measurable benefit and a real ‘step change’ to the charities that they work with.

I was reassured to learn that Step Change will support me through my first project by providing me with a mentor, and there is a supportive team of experienced project managers that meet up regularly.

I was very pleased to hear from Steven that I had been accepted to join the team of project managers, and I can’t wait to get started on my first project. I am looking forward to using my experience to help support charities to work on their Step Change projects.
5. Case studies

Katharine Barber, Home-Start Oxford

February 2020 was the perfect time for an ‘angel investment’ in IT, cloud systems, and communications!

Step Change funding meant we could immediately shift to home-working and continue our support to vulnerable families online, when COVID hit.

Our routes to reach families were restricted as health visitors were redeployed, but by hiring a Communications Manager, we’ve been able to supercharge our social media, helping to reach struggling parents directly. A new website with a quick ‘get help’ button means there’s now one-click access to our service from a mobile phone, and we’ve seen a 1,500% increase in contacts via Facebook Messenger.

This investment in systems and communications has freed me up to work on service development and advocacy for Oxfordshire’s Early Years sector, meaning that the grant will have a great force-multiplier effect, for our charity and others too.

Ruth Madder, Bridewell Organic Gardens

Bridewell Garden’s Step Change project was to transform the garden’s infrastructure, growing capacity by increasing staff time and funds available for our core activities. We can now focus on our primary purpose – providing a mental health recovery service for people whose lives have been affected by serious mental health problems, helping people transform their lives by re-engaging in their community, and taking steps towards training, volunteering and employment.

Thanks to the Step Change Fund, Bridewell Gardens now has off-grid solar electricity, a refitted kitchen, re-roofed workshops and a garden office allowing the whole team to be based on site with access to essential IT.

The Step Change Fund has transformed how we can work, enabling closer working relationships with other agencies, saving travel and administrative time, releasing funds to support staff training, and allowing us to increase the number of people we can support.
6. Supporting the charity sector in Oxfordshire through a pandemic and beyond

Laura Chapman, Grants Panel Chair at Oxfordshire Community Foundation (OCF)

For OCF, 2020 was dominated by its response to COVID-19. As the pandemic grew, OCF responded immediately, establishing the Community Resilience Fund (CRF) for local disaster relief. Support for the CRF was overwhelming, spurred by a donation of £500,000 from the Indigo Trust, funds from the National Emergencies Trust and local contributions. By February 2021, nearly £1.5m had been donated. Initially, OCF made grants for immediate relief efforts, "Respond Better". A second phase of the OCF response, "Recover Stronger", provided funds for strategic investment for long-term systems change, for example to embed the volunteer practices of the spontaneous community-led COVID-19 relief efforts, and to deliver universal online access. As of March 2021, pandemic relief grants totalling over £814,000 have been awarded to nearly 200 grassroots organisations across the county.

The pandemic also highlighted OCF’s role as a lynchpin of Oxfordshire’s community and voluntary sectors. OCF grants directed the generous donations swiftly to those most in need, and provided a lifeline as devastation hit. OCF was the communications hub for pandemic efforts, with weekly webinars and social media posts. The pandemic, by highlighting gaps in delivery, also increased opportunities for OCF to demonstrate its partnership-building skills. One example was to kick-start a campaign to overcome the digital deficit, which had increased hardship during lockdown for home-schooling of disadvantaged children, and further limited social contact for those isolated individuals without internet. This was achieved with a grant of £20,000, matched by Our Common Good, an OCF Donor-Advised Fund.

Coincidentally, 2020 brought significant organisational change for OCF. John Taylor, Chair for the past five years, retired in March. The trustees asked Board member Nick Case to assume the role until the end of his current trustee term. Jayne Woodley retired as CEO in July after a remarkable 10 years. Adrian Sell, her successor, brings extensive Oxfordshire voluntary sector experience, including senior roles with East Oxford Action, Age UK Oxfordshire and OXPIP. A priority for him at OCF is to support the Step Change Fund so that its investments achieve the maximum benefit for Oxfordshire.

“Step Change has allowed OUitC to invest in personnel allowing it to make an organisation growth and solid foundations. We have piloted our hub-and-spoke strategy “Oxfordshire – A Community United”, whilst developing digital tools such as an ecommerce website. Scaling up activities will strengthen the charity’s financials and increase its impact across Oxfordshire, setting it up for a sustainable future.”

Chris Lowes, Director, Oxford United in the Community

Step Change Fund
APPENDIX 1  Panel member biographies

Sandy Arbuthnot (Chair) graduated in Geology and spent his early career as a site engineer on civil engineering projects around the world. Following an MBA, he worked briefly in investment banking before taking a number of roles in corporate strategy and general management. In 1997 he was appointed Managing Director of a small subsidiary of Burmah Castrol. Having led the buyout of this business he subsequently sold it to an Australian multinational. Between 2010 and 2018 he was on the board of Oxfam’s Enterprise Development Programme. He is an angel investor and has been a director of two successful Oxford University spinout companies. In 2019 Sandy completed a full-time MA in Art History at the Courtauld Institute.

Laura Chapman is a trustee of OCF and Chair of the community foundation’s Grants Panel. She was Chief Executive of the Freemasons’ Grand Charity for 16 years. During that time, she oversaw a grant-making programme with an annual expenditure of approximately £5m. In her earlier career, she headed up BT’s award-winning Community Affairs Programme, responsible for the evaluation and selection of economic development, social welfare and cultural projects. Laura has worked as a freelance consultant for Business in the Community and CSR activities, and in the evaluation of public policy initiatives primarily in urban regeneration and community development.

Olga Senior originally qualified as a nurse and then spent 34 years working in the NHS in clinical and managerial roles locally and nationally until she retired at the end of 2013. She has previously held roles as a Governor at Abingdon School and a Director at Vale House Care Home in Oxford. Currently she is a member of the Independent Monitoring Board of HMP Huntercombe; a member of the Thames Valley Police Professional and Ethical Standards Panel; a panel member reviewing detentions under the Mental Health Act; a member of the Charity Committee of Oxford Health NHS Foundation Trust; and chairs a steering group working towards making Abingdon a Dementia Friendly Community.

Marion Stevenson originally qualified as a probation officer. She practised for seven years in criminal work and as a divorce court welfare officer, before becoming a family mediator (divorce mediator) in 1989. She was Director of Oxfordshire Family Mediation between 2003 and 2011 and a mediation trainer for National Family Mediation from 2006 to 2014. She founded Oxford Community Mediation in 1995 and Charity Mentors Oxfordshire in 2012, chairing its board of trustees until 2018. She co-founded the Step Change Fund with Colin Alexander, with support from Robin Buxton.

Tony Stratton joined Thame-based CPM in 1975, became CEO in 1990, Group Chairman in 2003 and is now Chairman Emeritus. He is Chairman of Marketing and Sales Consultancy The Quantic Group, and advises several companies in the marketing communications sector. In 2004 he joined the board of Oxford Inspires, becoming Chair in 2006 and led the merger with Visit Oxford, creating Experience Oxfordshire. He continues to be involved in a number of social initiatives within the county. A Liveryman in the Worshipful Company of Marketors, a member of the Marketing Group of Great Britain and a Fellow of the RSA, he is also a Deputy Lieutenant of Oxfordshire and was High Sheriff of Oxfordshire 2014–15.

Martin Wilkinson is a qualified accountant (CIMA) who spent his career in a number of business organisations in the UK and Canada. He held senior financial positions in three multinational businesses, particularly an Oxford-based academic publisher where he was Financial Director for 15 years. He has held a number of non-business positions in educational institutions (primary, secondary and Oxford Brookes University governorships) and local charities. The latter category includes Chair of Oxfordshire Family Mediation, and Treasurer of Earth Trust and St Luke’s Hospital, amongst others. He joined the Step Change panel in early 2016.
APPENDIX 2

Project manager biographies

**Gina Almond** is a knowledgeable and successful Director with over 20 years’ experience in global commercial marketing and product development. She has worked within the corporate environment as well as the charity sector. She has overseen company integrations, internal restructures and business transformations across global organisations. She is currently Director of Fundraising and Marketing at The Brain Tumour Charity where she is tasked with delivering bold marketing and fundraising strategies to commercialise the charity and maximise income. Gina lives in Oxford.

**Bradley Bain** moved to the UK to work in the market research consultancy space five years ago, after receiving his MSc in Marketing and Consumer Studies and working in academic research in Canada. He has worked on a number of projects, including new product design, brand positioning, proposition and concept testing, and user experience research over this time. He is now leveraging his consultancy and academic background to help charities solve similar problems. Bradley lives in Oxford.

**Olga Biles** is an IT project manager with over a decade of experience in the non-profit sector. Having led and managed a wide variety of technology-based initiatives for several global household names, she runs her own consultancy working with clients to design and implement projects where the needs of the business and its people come first. Having made Oxfordshire her home for the last 20 years Olga is keen to share her expertise and pragmatic approach to help local charities succeed.

**John Caunt** has had a long career in scientific instruments, has a Masters in Nuclear Physics and has his own company. He has a wide range of activities and started North Parade Community Market in 2013. He is a member of Oxford Real Tennis Club and is an active member of Park Town Residents Association. He was the Master and past Master of a Livery Company, The Worshipful Company of Scientific Instrument Makers.

**Andrew Colleran** has spent his career in IT, working throughout Europe with a variety of organisations, in retail, information services, academia and security, to help them use technology to their advantage. He is now helping several local charities in the same way. Andrew lives in Oxford.

**Steven English** has over 35 years’ global experience in the chemical industry, and has worked at very senior levels in multinational companies, based in Germany, Switzerland and the USA. He has a strong business development background and more recently has started his own consultancy helping start-up companies fulfil their potential. Steven lives in Oxford.

**Gary Gibbs** started his career in the chemical industry, working in research and development before moving to the food industry. He spent many years developing food products, and as a senior manager set the strategic direction for innovation, generating and delivering the business case for each product. More recently Gary used this experience to project manage setting up a new dementia joint research centre. He is a church warden where he lives in Kidlington.

**Gian Gopal** founded the Oxford Hindu Temple and Community Centre Project with view to setting up a Hindu Temple in Oxfordshire, following a distinguished career as an experimental particle physicist at Rutherford Appleton Laboratory. Gian lives in Abingdon.

**Neil Morrick** has focused on acquisitions, start-ups and turnarounds in the automotive industry, and specialised in interim and project management. He is a past chair of local education, health and welfare organisations, initiated and co-wrote the Charity Chairs Checklist, launched networks and now delivers workshops and mentoring with OCVA. Neil lives in West Oxfordshire, at Idbury.

**Lisa Mynheer** worked in leukaemia research before becoming a founding director of a biotechnology start-up. She then set up and managed the UK’s first fully equipped micro-incubator for new diagnostic technologies, helping entrepreneurs turn their innovations into businesses. Lisa has a PGCE in coaching and facilitation and is now focused on using these skills to support the change in culture required for effective innovation management processes. She lives in Horton cum Studley.
Nick Paladina is a Chartered Accountant, and has spent most of his career in senior management positions in the not-for-profit sector, including in film and theatre, a national museum, professional societies and international education. He has also held several charity board roles, including Chair of the Oxford Literary Festival, St Peter’s College Audit Risk and Remuneration Committee and Treasurer of the Temple Music Foundation. He currently works providing financial guidance to theatre companies, and is a trustee of Phosphoros Theatre and a mentor with Charity Mentors.

Anca Davies-Ruso is an entrepreneurial innovator, strategic marketer and business technologist, with over 20 years of omnichannel digital transformation experience, working in senior leadership positions across global pharmaceutical industry, telecommunications, banking and financial services, public sector and management consultancy. Anca lives in Wallingford, Oxfordshire.

Graham Shaw has worked for over 25 years as both an executive and non-executive director of commercial companies in diverse industry sectors. He has previous Trustee experience as Chair of the Earth Trust and Treasurer of the Archway Foundation and was Chief Executive of an Oxford-based charity (DIPEx) for five years. Graham is Managing Director of two local technology companies and holds non-executive positions with a private equity investment group and with two technology businesses based in Nottingham. He lives in Dorchester-on-Thames.

Andrew Silver joined his family’s restaurant company over 40 years ago, and for the past 35 years has been running it. The business primarily consists of operating Quick Service restaurants, and it was one of the first multi-franchisee operators in the UK. Today the company operates a number of Burger King restaurants, as well as running a busy seaside restaurant business on the South Coast. Andrew was born in Oxford, and enjoys living in this great city.

Tahmina Sultana has worked in online retail business, education and financial service organisations. She has a diverse and multi-cultural background and has helped various local educational charities to gain more value through efficient management. She is currently managing an online retail business.

Philip Wootton worked for a large British multi-national for 35 years in senior management positions, then spent 14 years with Business Link, public-sector organisation helping small enterprises thrive. When government funding was withdrawn in 2011 he continued to work for the operating company developing and marketing EU grants to businesses. Philip has been involved with several charities in Oxfordshire and lives in Oxford.
The Step Change Fund is a charitable fund hosted and administered by Oxfordshire Community Foundation, Charitable Incorporated Organisation number 1151621.

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www.oxfordshire.org/step-change-fund