

# Review of the Year

April 2022





## About Step Change

**The aim of the Step Change Fund is to strengthen foundations of proven voluntary sector organisations, so that they can grow to meet the challenges faced by some of our most disadvantaged neighbours.**

For many people in our county, these challenges are multiple and often embedded across generations and within areas. The Step Change Fund supports medium-sized social organisations that are already making a positive difference, making substantial grants to strengthen them over the long term.

The Step Change Fund was established in 2014 when a group of Oxfordshire-based philanthropists recognised that many charitable organisations struggle to obtain funding to build core capacity and thus fail to achieve sustainable growth. 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 and making investments at a scale that reinforces the best organisations for the long term.

The Step Change Fund is hosted and administered by Oxfordshire Community Foundation (OCF). OCF provides the first point of contact for charities and ensures that applicants meet the fund's broad eligibility criteria. This guidance, combined with the proven Step Change methodology, has seen the fund achieve an 80% success rate and an average increase of 61% in the turnover of the organisations supported.

**To find out more visit [www.oxfordshire.org/step-change-fund](http://www.oxfordshire.org/step-change-fund).**



## Chair's report

### April 2022

It is now almost two years since I took over as Chair of the Step Change Panel. These two years have of course been dominated by the COVID-19 pandemic and the impact the various lockdowns have had on our lives. The panel has been forced to meet remotely for most of this time, and we are looking forward to the more sociable dynamic of a physical meeting later this month.

The membership of the panel continues to evolve. Since last year's Annual Review, we have lost the invaluable services of two founding members. The creator of the Step Change model, Marion Stevenson, has stepped down after eight years of tireless service, and we include a tribute to her achievement in this review. We have also said goodbye to Tony Stratton, who had been a panel member since 2015. Tony brought wide experience and great wisdom to the role and was a regular source of advice to me, as I began to find my feet as the new Chair.

We have recruited four excellent new panel members. Anne Davies now represents Oxfordshire Community Foundation in place of Laura Chapman, who has stepped down as an OCF trustee. Laura remains on the panel in her role as a donor, and is taking an active role promoting the fund.

In an attempt to replace Marion and Tony, we have recruited the very strong trio of Brian Buchan, Elizabeth Paris and Roz Warren. Brian is Vice Lord Lieutenant of Oxfordshire, having enjoyed a distinguished business career. He brings extensive connections in the County and particularly its charitable sector. Elizabeth, following a high-level career in banking, has undertaken a number of charitable roles in Oxfordshire. Roz recently stepped down as coordinator of Charity Mentors – a role that gives her a particularly comprehensive knowledge of the local charity sector. Brief biographies of all three are included at the end of this review.

The Step Change Fund continues to focus on making grants that have permanent long-term benefits (step changes) to the grantee organisation. Our grant assessment process is two staged. First, we look at the size, financial health and aims of the charity. Then we assess the proposed project for its ability to deliver lasting enhanced reach to its beneficiaries. Inevitably, not all applications are approved, but our rigor allows our donors to be confident that their generosity is rewarded with maximum impact.

Our last four grant panel meetings have considered eight full bids, of which five were fully approved and one was approved following receipt of further information. These six projects resulted in grants between £35,000 and £70,000, with a total disbursement of £308,000. Two charities were asked to resubmit their projects, as the panel felt we had insufficient information to approve the grants. During the same four meetings, 16 Expressions of Interest (EoIs) were received, of which eight were approved to make full bids and one was asked to resubmit. I hope these figures give both a sense of the panel's rigorous approach to awarding grants, and the scale of change we are hoping to catalyse.



Approving Step Change grants is only the first stage of our process. The funds are only released against the achievement of agreed project milestones, and all projects are monitored for a year following release of the final tranche.

Our wonderful project managers play a central role in project monitoring and disbursement of funds. They represent a key difference between Step Change and other philanthropic grant-giving models. As always, I would like to thank Steven English and his project manager team for their key role in the Step Change success story. We continue to recruit new project managers and brief biographies of the current team are included at the end of this report.

It is, as always, my pleasure to thank our donors, whose great generosity allows us to assist so many excellent organisations in the County. We are funded by sizeable donations from a small number of local philanthropists, and we continue to look for additional donors as we expand our support of Oxfordshire's most deserving charities.

Following the end of COVID-19 restrictions, we look forward to stepping up our grant giving to those organisations best placed to address the challenges of 2022 and in particular, the poverty caused by the continuing sharp rises in the cost of living.

### **SANDY ARBUTHNOT**

*Step Change Chair*

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**“Our wonderful project managers play a central role in project monitoring and disbursement of funds. They represent a key difference between Step Change and other philanthropic grant-giving models.”**

Sandy Arbuthnot, Step Change Chair

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**“Thanks to the support from the Step Change fund, Anjali has been able to share its 25 years’ world-leading experience for the benefit of others, and worked on internal processes, including a Succession Plan preparing for the founder’s imminent retirement, and the recruitment and induction of new leadership. This has led to a more resilient organisation better prepared for the future.”**

*Nicole Thompson, Artistic Director, Anjali*

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## 1. Summary of approved projects in 2021–22

The following grants were awarded in the past 12 months, following a rigorous application process. This includes submission of an Expression of Interest and, following approval at a panel meeting, working with a Project Manager to develop a Detailed Bid that is then presented to the next panel meeting.

During COVID-19, these presentations have been pre-recorded via Zoom and shared with the panel.

Grant	KPIs
<b>BE FREE YOUNG CARERS (BFYC)</b>	Supports children who care for a relative at home with respite activities, befriending and a support network of their peers
£35,000 October 2021 (Grant II) To extend the success of their South Oxfordshire service to the rest of Oxfordshire	<ol style="list-style-type: none"> <li>1. Number of young carers supported per year</li> <li>2. Number of schools referring to BFYC per year</li> <li>3. Number of families reporting satisfaction with the BFYC service per year</li> <li>4. Number of young carers reporting greater self-confidence and wellbeing per year</li> <li>5. Number of volunteers trained and active per year</li> </ol>
<b>MY LIFE MY CHOICE (MLMC)</b>	Ensures that there is independent support for people with learning disabilities in Oxfordshire to have their say, claim their rights and to take control of their own lives
£48,460 July 2021 To provide greater access for disabled people to digital platform activities	<ol style="list-style-type: none"> <li>1. Number of beneficiaries receiving intensive training and support (increase from 32 to 70)</li> <li>2. Number of devices distributed (increase from 31 to 50)</li> <li>3. Number of new MLMC members engaged (increase by 34)</li> <li>4. Additional member email addresses added to MLMC database (increase by 120)</li> <li>5. Numbers engaging with charity's online activities (aim to have 160 people engaging)</li> </ol>
<b>PEOPLE, PLACE AND PARTICIPATION</b>	Community benefit society founded in 2018 to take on the community management of a decommissioned children's centre and develop it as a community enterprise hub in Florence Park
£55,000 May 2021 To increase funding and trading, and widen services at Flo's – The Place in the Park (shop and café)	<ol style="list-style-type: none"> <li>1. Trading KPIs: shop turnover meets financial targets; café turnover meets financial targets; market analysis</li> <li>2. Organisational and Enterprise Development KPIs: recruit for key leadership; upgrade IT; reduce consultancy costs by 50%; implement One Planet Action Plan</li> <li>3. Community KPIs: increase membership by 20% over two yrs; diversity social enterprises trading independently (Syrian Sisters and No Vice Ice); pavilion reopened; established food inequality programme</li> </ol>
<b>QUEST FOR LEARNING (QfL)</b>	Supports all children to leave primary school able to read well and be confident about maths
£70,107 November 2021 To upgrade systems and capacity to support rapid charity growth and develop financial self-reliance	<ol style="list-style-type: none"> <li>1. Efficient management of increasing numbers of beneficiaries and reduced admin through development and implementation of new system and tools</li> <li>2. Capacity for real-time data analysis and short- and long-term impact analysis to support delivery programmes</li> <li>3. Increased revenue from QfL training programmes by increasing number of courses and number of delegates per course</li> <li>4. Increased share of teaching staff CPD training market in Oxfordshire</li> </ol>

## 2. Other active projects and case studies

The following projects were funded in previous years, and are still either receiving grant payments or are within the one-year monitoring period. All are being supported by their Project Manager to ensure they meet KPIs and continue to realise the benefits of the grant.

Grant	KPIs	Achievements to date
<b>ANJALI DANCE COMPANY</b>		
A touring company of learning-disabled dancers		
£25,322 Apr 2019 (Grant II) To make the most of Anjali's extensive knowledge and experience by creating packages for training and consultancy to create a new funding stream	<ol style="list-style-type: none"> <li>1. Documentation used by 100 dance artists by 2022</li> <li>2. Income of £25K from distribution of materials by end 2022</li> <li>3. Documentation used for in-house training and induction of Anjali team members and practitioners</li> </ol>	The project manager reports that this is a great example of how the Step Change Fund can help organisations move to a more confident position and use that to unleash new funding. The scoping workshop Step Change initially funded was key to kicking off this project, but in hindsight, it was transformational. The Transition and Legacy project is now complete, including an Operations Manual, online resources website, and marketing, business and succession plans to manage the retirement of the inspirational founder and artistic director. Career plans have even been drawn up for the core dancers.
Project completed April 2021 – outcomes monitored until April 2022		
<b>ARCHWAY FOUNDATION</b>		
Supports and befriends those experiencing loneliness and isolation		
£43,388 Jan 2020 (Grant II) To equip volunteers to work with more challenging clients and to work in more remote areas	<ol style="list-style-type: none"> <li>1. 40 existing volunteers completed higher-level training</li> <li>2. 10 Friends (service users) living in outlying areas and/or with complex needs (14) will have been matched with a trained volunteer</li> <li>3. 24 new volunteers will have been recruited and received induction, initial and higher training</li> <li>4. Impact measurement tool analysis will show reduced loneliness, improved social connectedness and wellbeing</li> </ol>	All KPIs were being met or exceeded prior to the pandemic, after which significant changes were made to both content and delivery of the training. COVID-19 created huge demand for the charity's services, and made the need for their Step Change project even more urgent. The charity is now at capacity for recruiting and training new volunteers. Peer support groups have been set up for concerns and experiences to be shared. Surveys are in progress to measure the impact of telephone support and volunteering more widely.
Planned completion date: May 2022		

## Case study: The Archway Foundation

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**A Step Change grant has empowered this loneliness charity to significantly increase its capability by transforming the type, reach and activity of its volunteers.**

The Archway Foundation works to alleviate the distress caused by loneliness and social isolation, connecting people with others via a diverse group of empathetic and diverse volunteers, many of whom have experienced loneliness themselves.

When the charity's CEO Sheila Furlong applied to the Step Change Fund for a grant of £43k in late 2019, she was focused on a large waiting list of people with complex needs, who would benefit greatly from the befriending services the charity offers, but needed expert support from specially trained volunteers. Many on the list were also based in more rural areas across Oxfordshire, when the charity's services had previously been focused on the city of Oxford.



Wanting to increase Archway's reach and flexibility, Sheila worked with project manager Nick Paladina to put in a successful detailed bid with a view to starting work in February 2020. "The process was very clear and transparent," says Sheila. "The timescales and planning requirements give you the chance to think about what you are applying for and what it is you hope to achieve – as well as monitor the effectiveness of the grant as you go along.

"The relationship with Nick worked really really well, and straight away he understood what we were trying to do and the third sector more generally. His support was really personalised, and it was really positive to have a face associated with the grant."

When the pandemic came along, Nick helped Sheila to plan adaptations to their service, in particular carrying out befriending activities by phone rather than face to face. The Step Change panel were flexible about how the grant-funding could be spent in the COVID context – and in fact, Sheila says that despite the huge challenges, the restrictions meant that they achieved their original objectives for the grant more effectively than they could have imagined.

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**Several beneficiaries have reported that these phone calls were the only thing stopping them taking their own lives.**

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"We were able to recruit volunteers for what was becoming a changed service, which demands a different skillset. We recruited more than planned as it was more cost-effective to train online. And we were able to reach more people in outlying areas and with extra needs – including those who felt more comfortable on the phone than in person, as it was less threatening for them. We got to know people better and understand where they might need referrals to other services in our networks.

We're now changing our whole model to work people through a pathway from phone support towards face-to-face sessions either on an individual basis and/or via a social group."

In this sense, Archway truly has achieved a step change. They have trained over 20 new volunteers and engaged all 40 people on the waiting list with phone support, of which 83% report that receiving calls has helped them. Beyond the numbers, Archway has proven to be a real lifeline for the people supported – not just a friendly chat but in some cases the only contact they had with the outside world. Several beneficiaries have reported that these phone calls were the only thing stopping them taking their own lives.

In one instance, an Archway volunteer arranged for a GP to visit a beneficiary experiencing breathing difficulties due to asthma, but who was until that point refusing any care. Through the Step Change funding, Archway has saved his life and those of many others.

Grant	KPIs	Achievements to date
<b>COGGES HERITAGE TRUST</b>		
House and farm in Witney where families can learn about the past		
<p>£49,360 April 2018</p> <p>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</p>	<ol style="list-style-type: none"> <li>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</li> <li>2. 45 new opportunities to volunteer, equating to a £24,000 contribution</li> <li>3. Three volunteers receive disability training and instruct an additional 50 others</li> <li>4. A social impact evaluation toolkit is purchased and an evaluation strategy implemented</li> <li>5. Work with four other new partners to establish wider volunteer recruitment pool; at least one active partner relationship for each target audience</li> <li>6. Partnership accounts for 50% of volunteer training and support</li> </ol>	<p>The grant included a refurbishment project to the premises to make them suitable for volunteers. Key project management and volunteer coordinator roles were 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.</p>
Project completed April 2021 – outcomes monitored until April 2022		
<b>HEADWAY</b>		
Provides support to anyone in the county affected by an acquired brain injury		
<p>£47,673 Jan 2020</p> <p>To improve clients' experiences and related outcomes of those people that the charity serves using an engaging, efficient new CRM system</p>	<ol style="list-style-type: none"> <li>1. All front-line staff will be actively using the system in the field therefore reducing office visits by 80%</li> <li>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%</li> <li>3. Financial systems are fully integrated, reducing manual entry by 16 hours per month</li> </ol>	<p>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 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.</p>
Project completed October 2021 – outcomes monitored until October 2022		
<b>HOME-START OXFORD</b>		
Supports parents with young children who are suffering mental health difficulties and are struggling to manage their children's behaviour		
<p>£57,380 Jan 2020</p> <p>To install vital infrastructure and communications investments that will enable growth – freeing data-entry time so case workers can deal with more referrals</p>	<ol style="list-style-type: none"> <li>1. 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</li> <li>2. Increase volunteer numbers from 38 to 60 over two years, through online access and expanded communications</li> <li>3. Increase unrestricted income from £50k to £75k p.a. by expanding the donor base and supporter communications</li> </ol>	<p>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. Supported families have risen in 12 months from 230 to 275. Volunteer numbers are also increasing, with 49 in place and a further 12 to be trained in March. Non-restricted funding has exceeded targets over the last year.</p>
Project completed March 2022 – outcomes monitored until March 2023		

Grant	KPIs	Achievements to date
<b>OXFORD AGAINST CUTTING</b> Tackles female genital mutilation (FGM) and forced marriage of girls and women living in Oxfordshire and the Thames Valley		
<p>£40,000 Nov 2019 (Grant I)</p> <p>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</p>	<ol style="list-style-type: none"> <li>1. STRUCTURAL STRIDES: Schools Coordinator recruited; 3-5 new facilitators; marketing literature created and printed; Social Media Influencer/s research project</li> <li>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</li> <li>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</li> </ol>	<p>Five new facilitators joined the team, and FGM and HBA workshops were developed, but their delivery was suspended during the two lockdown school closures. Two schools have since signed up and three more have expressed strong interest. The project manager is supporting the charity to prioritise the project as they balance it with other projects that meet statutory requirements on domestic abuse awareness. The latter projects attract significant contributions towards the organisation's core costs.</p>
Planned completion date: July 2022		
<b>OXFORD AGAINST CUTTING</b> Tackles female genital mutilation (FGM) and forced marriage of girls and women living in Oxfordshire and the Thames Valley		
<p>£29,815 Oct 2020 (Grant II)</p> <p>To increase reach awareness and brand awareness via a social media initiative</p>	<ol style="list-style-type: none"> <li>1. Within the first month: hire media comms manager, develop social media strategy, set up reporting tool, manage regular content across all platforms, set up advertising</li> <li>2. Within six months: new content created (marketing films etc), channel takeover initiative with young people</li> <li>3. End of 12 months: reach 5,000 follows; strong affiliation with five influencers; fundraising from activities in place and reaching target (self-funding of media comms activities)</li> </ol>	<p>A Social Media Coordinator was appointed and trained on disowment, cosmetic body alterations and forced marriage. The charity secured additional funding from another organisation for this role to continue. They have developed a comms strategy and reporting tool, and made inroads with paid social media advertising, increasing reach, engagements and link clicks. During the last quarter of 2021, they created three campaigns, including an international initiative '16 Days of Activism against Gender-Based Violence', and Punjabi and Urdu versions of their awareness-raising films.</p>
Project completed July 2021 – outcomes monitored until July 2022		
<b>OXFORD GATEHOUSE</b> Offers free support services for adults who are homeless, vulnerably housed, on low income and/or looking for company and community		
<p>£46,620 Feb 2021</p> <p>To improve the internal structure of all the services delivered via a digital system that manages volunteers, clients and staff data better</p>	<ol style="list-style-type: none"> <li>1. Sourcing and tailoring a management system which meets the needs of the organisation and can be adapted to meet change</li> <li>2. Staff and volunteers are competent and confident in using the monitoring system, which will lead to paperless working across the organisation</li> <li>3. Management staff able to complete detailed and metric reporting and set up new activities</li> </ol>	<p>The Lamplight CRM system has been installed and a Project Manager employed to implement this and train staff and volunteers. They are now at the end of the development phase, which included very intensive training. The Project Plan continues to be revised. The transition between the old (paper-based) and new systems is happening via a period of parallel running through the initial months. This will enable Gatehouse to monitor and evaluate the effectiveness of the data capture into Lamplight and make whatever procedural or technical modifications are necessary to ensure it is fulfilling its purpose of capturing and reporting on all activities.</p>
Planned completion date: February 2023		

## Case study: Oxford Gatehouse

**Step Change funding has enabled this homelessness charity to invest in IT infrastructure that has transformed the way they operate on a day-to-day basis. New software is helping them motivate their people and articulate their impact in a completely new way.**

The Gatehouse applied for their Step Change grant after the initial effects of the pandemic had been felt. With closures and adaptations to their drop-in services during lockdown, the charity had had the space and time to evaluate and improve their services. Two themes emerged from this: huge inefficiencies in the way services were administered were identified; and they decided to shift towards more grants-based fundraising in future, requiring much better evidence of impact.

Gatehouse CEO Kat Horne says: "We were paper-based and the administration was extremely labour-intensive. Large amounts of useful data were being captured, but we had no way of collating or analysing it. We couldn't track trends (such as an increase in cases of modern slavery) or report back on funding, and had no time to create a meaningful impact report."

Kat describes being really proud to get through the rigorous application process, which is helping her make good applications to other funders. She developed an honest and transparent working relationship with her project manager Andrew Colleran, who gave a refreshing perspective on the challenges, "some of which hurt"! For example, Kat had envisaged managing the implementation of a new CRM system herself, with little prior experience; the PM convinced her to include the cost of a dedicated new staff member for this in her detailed bid, which was funded by the panel.

The investment has been transformational. Much-needed new devices and laptops were purchased; and the Lamplight charity databased was installed, allowing both hard and soft outcomes to be recorded – for example, number of attendees at a particular session, but also measures of their wellbeing, confidence or levels of isolation over a period of time. It also allows Kat to monitor and generate reports around internal management themes such as client load by staff member, volunteer hours or donations of clothing, and to identify new needs for which the team needs to upskill.



Kat says: "All of this takes me about five minutes, versus a whole afternoon, with much more meaningful data and reporting. It has increased my own confidence as a manager, giving me something to motivate staff or beneficiaries to show them what they are achieving. I know more about my own organisation, and we actually have a more open working culture as a result."

The new system and processes are scalable, and have improved every aspect of managing and growing the charity.

The project has had positive ramifications Kat had never dreamed of. "The new staff member was able to design flexible training adapted to the individual needs of different members of the team, many of whom have lived experience of homelessness. Some of these needs were not known about before, but he has helped staff, volunteers and beneficiaries develop digital skills and make themselves more job-ready for the future."



**"I know more about my own organisation, and we actually have a more open working culture as a result."**

<b>OXFORD UNITED IN THE COMMUNITY</b> Uses the power of football to inspire the people and communities of Oxfordshire to have positive aspirations for their futures		
<p>£30,337 Sept 2020</p> <p>To build a hub and spoke model – a pilot in one location which will endeavour to receive payment for its activities with young people and show that through sport they can build confidence and lead fulfilling lives</p>	<ol style="list-style-type: none"> <li>1. Initial 'town spoke' established in Banbury, engaging with 500 people per year across multiple age groups and social needs</li> <li>2. New impact measurement tool analysis shows improvements in healthy living, confidence and a reduction in anti-social behaviour in first town spoke</li> <li>3. Stakeholder and partner feedback</li> <li>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</li> <li>5. Hub and spoke model with one town spoke fully self-funded by OUiC after end of year 1 of project, so can continue into year 2</li> </ol>	<p>The Banbury spoke (Easington Sports FC) has been established, and over 500 individuals across a range of age groups have been engaged with. Impact measurement (both hard and soft) shows inroads have already been made in improving healthy living and confidence, and there have been distractions from opportunities for anti-social behaviour. From July 2021 about £7k has been generated in funds (pro-rated this would be in excess of the annual target of £12k – pandemic restrictions delayed the start of paid-for programmes), and Easington Sports have been able to apply for funds which were otherwise closed to them. The Operations Support Executive has now been retained on a permanent basis, funded from OUiC's own resources. The OUiC board has approved approaching potential partners in Abingdon, Bicester and Didcot to establish new spokes.</p>
<p>Project completed July 2021 – outcomes monitored until July 2022</p>		
<b>OXFORD PARENT INFANT PROJECT (OXPIP)</b> Offers direct therapeutic mental health services to families in Oxfordshire		
<p>£24,500 May 2020 (Grant II)</p> <p>To significantly increase OXPIP's capacity to meet the demand from external commissioners for OXPIP's specialist parent-infant relationship training, growing income for service delivery in Oxfordshire</p>	<ol style="list-style-type: none"> <li>1. Selection, recruitment and induction of a Training Manager who successfully passes their probation period</li> <li>2. Delivering and building upon the 2020/21 Training Delivery Plan by growing the trainer team (employed and freelance) and training service</li> <li>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</li> </ol>	<p>The positive impact of this project is that it built on previous Step Change Fund funding, to recruit a Specialist Training Manager dedicated to developing OXPIP's professional training further and consolidate existing provision. This included reviewing and seeking to expand the existing training team; and implementing a graded approach to 'train the trainer', so that new members of the training team could be skilled up to deliver training at a pace appropriate to their individual professional development. The project has also allowed the opportunity to review the development and scope of both current and other courses.</p>
<p>Project completed March 2021 – outcomes monitored until March 2022</p>		
<b>RAW WORKSHOP</b> Provides training and employment for those with disabilities, learning impairments and other disadvantages that are a barrier to employment		
<p>£50,000 June 2019 (Grant II)</p> <p>To deliver gardening and landscaping services, training and employing people with mental health difficulties in the enterprise</p>	<ol style="list-style-type: none"> <li>1. Social impact hours: number of people engaging in both the main service and the gardens projects to grow quarter on quarter</li> <li>2. Financial: income yr 1: £70-£80k; yr 2: £95k; yr 3: £110k</li> <li>3. New customer acquisition (1 x new corporate customer per year) and subsequent growth in social impact</li> </ol>	<p>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 had a negative effect as staff were furloughed and the business is being rebuilt.</p>
<p>Project completed June 2021 – outcomes monitored until June 2022</p>		

RIVERSIDE COUNSELLING SERVICE		Supports the mental health and well-being of adults and young people with a wide range of mental health issues
<p>£67,494 Jun 2019</p> <p>To deploy digital technology to enable the charity to work more effectively and efficiently</p>	<ol style="list-style-type: none"> <li>1. Improved efficiency – 20% reduction of time clinical staff spend on administrative tasks</li> <li>2. Improved impact reporting – production of monthly internal analysis reports to support clinical management, management of service or reporting required by external donors</li> <li>3. Increased income generation – 25% of fundraising income generated by new donors</li> </ol>	<p>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.</p>
<p>Project completed February 2022 – outcomes monitored until February 2023</p>		

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

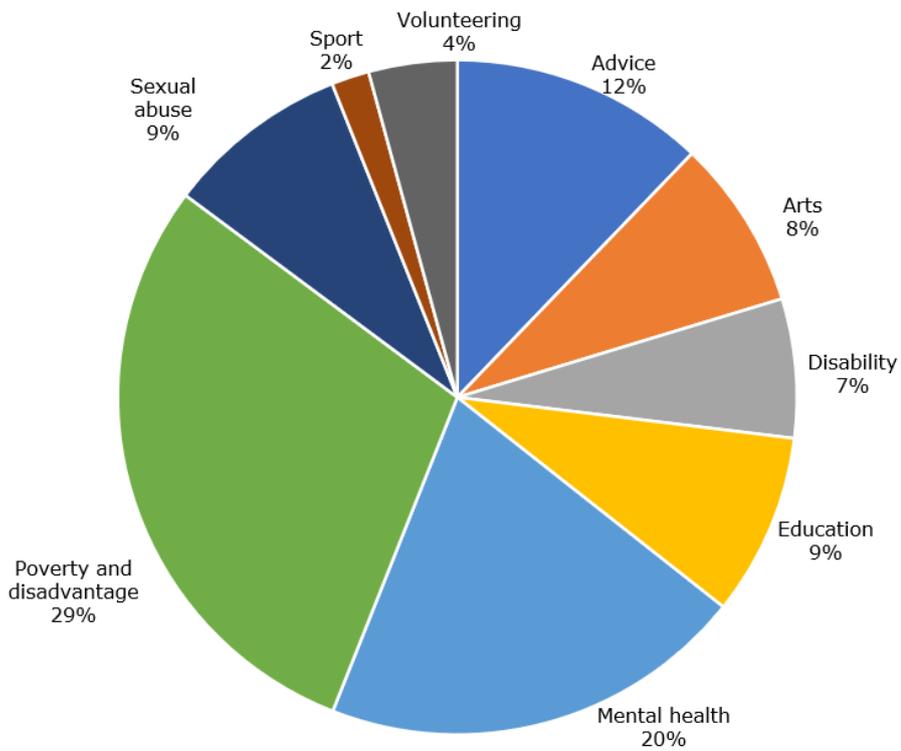


**“The Step Change Fund has enabled us to supply our members with laptops and iPads, in addition to providing free support and training. Members have learnt how to use Zoom, social media and email to connect with friends, family and colleagues and engage in work and social events. Significantly, getting online has given members more independence by providing easy access to services, such as doctors, pharmacies, and housing associations.”**

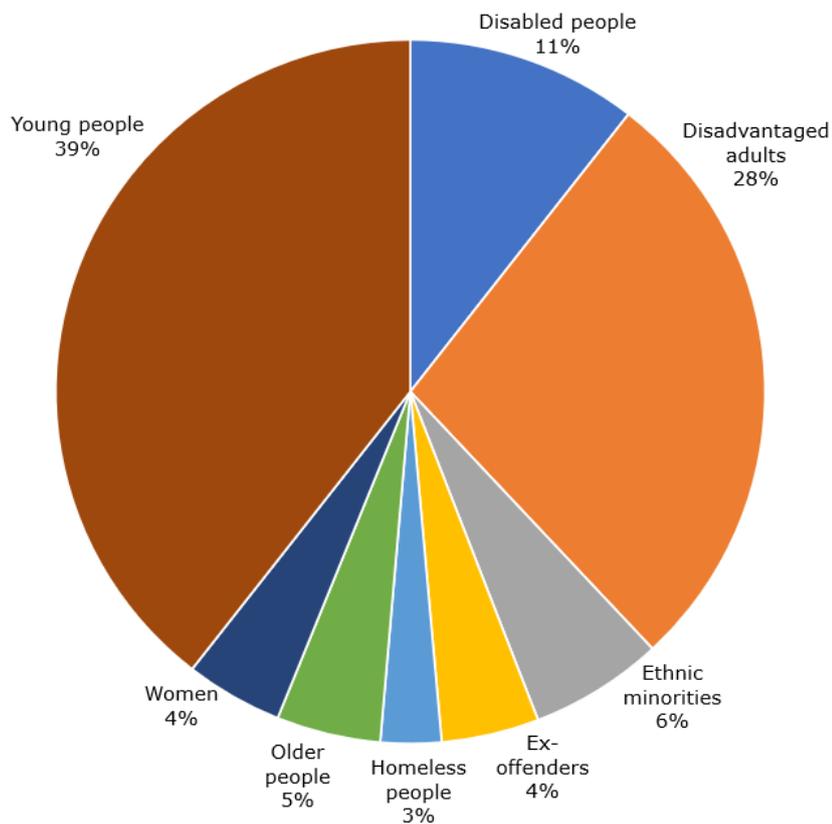
*Sophie Bolton, Computer Buddy project Coordinator, My Life My Choice*

The charts that follow describe the successful bidders and their projects since May 2014.

**Themes**



**Beneficiaries**



### 3. Financial summary as at March 2022

An important factor in the success of the Step Change Fund has been the willingness of donors to make a three-year donation commitment, providing the fund with the certainty of a future income stream. With the growing needs emerging from COVID-19, we now have a target annual grant expenditure of £400k. Our objective is to maintain a healthy balance that will enable us to plan for three years' grant funding.

Since inception		Funds out	Funds in	Balance
<b>Funds received from donors, including Gift Aid</b>			<b>£3,261,217</b>	
Less contribution to OCF		£158,463		
Net available for grants				<b>£3,102,754</b>
<b>Grants</b>				
Projects completed	£1,440,661			
Current projects – grants given to date	£294,890			
TOTAL GRANTS GIVEN TO 31/03/22		<b>£1,735,551</b>		
<b>Cash balance as at 31/03/22</b>				<b>£1,367,203</b>
Future commitments on current projects		£207,114		
Cash available for new projects				£1,160,089
Future pledges of donations (net of contribution to OCF)			£ 406,125	
<b>Forecast total cash available for future projects</b>				<b>£1,566,214</b>



“Support from OCF was instrumental in transforming Cogges’ relationship with its communities. New personnel supported improvement to procedures, training and communication for our volunteers and to open opportunities to engage with new audiences; thereby allowing us to fulfil our pledge to become a ‘Cogges for All’. At the same time, new facilities allowed us to place volunteers at the heart of the site and to reflect the value we place on their support. Thank you!”

*Paul Evans, Chairman, Cogges Heritage Trust*

## 4. Project managers update

The last 12 months have been challenging for the Project Managers at Step Change. Lockdown restrictions meant that face-to-face visits were unable to occur. We have a very inventive set of project managers who have continued to deliver in these difficult circumstances.

The last 12 months have also been testing for the charities and their projects. The amazing result is that none of the charities we work with have folded, and in fact, most have gone from strength to strength. They all have showed great resilience and ingenuity. Most charities are hands on and need face-to-face contact. However, by thinking outside of the box, they have not only overcome these difficulties, but improved their offerings accordingly.

The Project Manager body has also seen changes. Currently we have 12 out of 13 fully active Project Managers (one is taking leave for other charity work). In the last 12 months we have said goodbye to Neil Morrick, Gian Gopal and Andrew Silver, and all three have been invaluable project managers. We have been recruiting well in advance of any departures, and I am pleased to say that Anca Davies-Rusu, Bradley Bain, John Caunt and Tahmina Sultana, our newest recruits, all have projects and have performed admirably in the last 12 months.

Special thanks must be given to Graham Shaw, Gary Gibbs, Lisa Mynheer, Nick Paladina, Andrew Colleran, Philip Wootton and Olga Biles for their tremendous dedication and contributions. And more thanks must be given to Annette Ahern at OCF for keeping us all in order!

At the start of lockdown, we started having monthly Project Manager Zoom meetings. These meetings are not only a great place to exchange information on projects, but for the Project Managers to share learnings and to voice concerns.

Finally, the next 12 months look to be even more challenging. Restrictions on movement have gone, but we are moving into potentially austere times with all the issues that they bring. However, I am confident that the Project Manager team will rise to the challenge.

*Steven English, Project Manager Coordinator*



## 5. A tribute to our founder Marion Stevenson

At the start of this year, Marion Stevenson retired from the Step Change grants panel. Having co-founded the Step Change Fund in 2014, Marion had served on the panel from its inception and was at the heart of everything it did. Her imagination, drive and dedication have been inspirational and central to the fund's success. Her commitment and infectious energy will be sorely missed.

The Step Change Fund (previously the Future-Building Fund) was the brainchild of Marion and the late Colin Alexander. Based on their extensive knowledge of Oxfordshire's charities, their insight was that many organisations struggled to raise funds to build their core capacity, since most donors wished their grants to directly fund service delivery.

Through her work with Charity Mentors, which she founded in 2013, Marion understood the difficulties caused by a lack of funding for core costs. Colin, with a commercial background, believed in the benefit of delivering funds with business discipline. Applying business rigor (to the grants process and to the release of the grant funding) both minimised waste and helped the grantee establish sound financial practice. Between them, Marion and Colin understood the need and how to deliver an effective solution. The Step Change Fund was specifically created to strengthen organisations, allowing them to sustainably deliver more services to their beneficiaries.

In raising funds, Marion brought the concept of a 'Philanthropy Fellowship' to the Step Change Fund model. Leveraging the desire of many to support their local community, she understood the power of bringing together a group of like-minded philanthropists. These generous donors are kept regularly apprised of the progress of the significant grants made possible by their donations. In a study funded by the Esmée Fairbairn Foundation, Marion was quoted as saying "it seemed important to me to create a fellowship of people who are minded to give intelligently to charities in our area". In other words, a donor circle providing effective core funding to enable good charities to become even better. Marion, as many of us know, is the consummate fund raiser and she quickly established her fellowship of donors. Who could resist a compelling model and Marion's persistent charm?

I am sure you will join me in paying tribute to Marion for creating an inspiring philanthropic model which continues to benefit Oxfordshire's most disadvantaged citizens. We thank her for the enormous amount of time and energy she devoted to this task and look forward to expanding on her legacy in the years ahead.

*Sandy Arbuthnot, Step Change Chair*



## 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.

**Brian Buchan** studied at Jesus College, Oxford before embarking on an international career in consumer good companies such as Procter & Gamble, SSL International, RHM, Burtons Foods and R&R Ice Cream. He was Treasurer or Chair of Trustees for OXSRAD, a disability centre for 18 years and is now their President. He also chairs the Finance Committee of the Story Museum in Oxford, and is a former member of the Jesus College Development Committee. He is a Life Fellow of the Royal Society of Arts. Brian was appointed Vice Lord-Lieutenant of Oxfordshire in January 2019.

**Laura Chapman** 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.

**Anne Davies** is a trustee of OCF and Chair of the community foundation's Grants Panel. She is a senior IT professional with international experience at large multi-national corporations. She thrives on sorting out difficult situations and delivering business transformation and value through technological innovation across all areas of an organisation, including content and intellectual management, business analysis, supply chain management, financials, sales and distribution. After a 26-year career delivering IT systems for a series of high-profile publishing houses, she now works as an independent consultant, and is a regular speaker at seminars and conferences.

**Elizabeth Paris** spent 20 years in corporate finance at Chase Manhattan and JP Morgan, becoming a Managing Director in 1991. She has since been an Associate Fellow at the Saïd Business School; the University lead for several Goldman Sachs Foundation initiatives; and a consultant for the World Bank. She is Chair of The Oxford Playhouse, a Charity Mentor, and a trustee of SOFEA and Be Free Young Carers. Other Oxfordshire roles have included Chair of the Select Committee on Affordable Housing in Oxford, and Director, Common Purpose Oxfordshire. She is a Deputy Lieutenant of Oxfordshire, with a focus on Didcot and on families and children.

**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; a Director at Vale House Care Home in Oxford and a member of the Thames Valley Police Professional and Ethical Standards Panel. Currently she is Chair of the Independent Monitoring Board of HMP Huntercombe; a panel member reviewing detentions under the Mental Health Act; a member of the Charity Committee of Oxford Health NHS Foundation Trust; a member of the Strategic Independent Advisory Group at Thames Valley Police and chairs a steering group working towards making Abingdon a Dementia Friendly Community.

**Rosalind Warren** ran Charity Mentors Oxfordshire from its inception in 2013 until 2021. This experience gave valuable insights into the strategic challenges and governance structure of many of Oxfordshire's charities. Prior to this she was involved with OBX, a local charity that encouraged entrepreneurship in school-aged children who were less inclined to engage with traditional educational approaches. Her background is in agricultural economics and she worked as a consultant with LMC International as Director of their Sugar and Sweeteners' group, as well as a lecturing in the School of Agriculture and Policy Development at Reading University. She is also Chair of FarmAbility Oxfordshire.

**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 Abingdon.

**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.

**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-Rusu** 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.

**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](http://www.oxfordshire.org/step-change-fund)