

Agenda supplement



Listening Learning Leading

Document: Applicant's responses

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South Revenue Grant Scheme 2025-2027

Applicant's responses

Introduction

The following document is an extract of applicant's responses to the scored questions for the Revenue Grant Scheme 2025-2027 application. It also contains applicant's responses to help understand where each organisation is on their climate and nature recovery journey.

No attachments referenced to support the narrative have been included in this board paper, and officers have redacted any names.

Information relating to what the organisation does to support residents, and what they would like grant funding towards, are included in the accompanying officer scoring report.

Targets

Applicants have also submitted outcomes and targets which will be used to help measure the success of the services/activities each year over the grant period. Officers will review and agree these with the service manager based on the level of funding awarded, before releasing any grant payment.

Oxfordshire South & Vale Citizens Advice	Ref: SRev25-27/21
Financial Review	
Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.	
Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.	
We have presented a balanced budget for the next 2 years, however to address any potential funding shortfall and ensure uninterrupted support for our community, we will do the following:	
<ul style="list-style-type: none"> • Actively seek additional funding sources, and actively pursue grant opportunities from both public and private sources that align with our mission and services, leveraging external funding to supplement our budget. • Engage with the local community through awareness campaigns, fundraising events, and volunteer recruitment. Empowering our community to contribute. • While already a very lean organisation, we will continue to review of our operational costs, identifying areas for potential savings. • Advocate for the value of our services to local government and community stakeholders, emphasising the cost-effective benefits of early intervention and problem resolution. • Explore collaborative partnerships with other service providers that may lead to shared resources and reduced costs. • Draw upon any existing reserve funds to cover immediate shortfalls while simultaneously implementing long-term strategies for financial sustainability. 	

- In extreme cases, we may need to prioritize essential services while temporarily reducing or suspending less critical programs to ensure core support remains intact.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

The most important item to note is that we are currently working towards merging with Citizens Advice Oxford and Citizens Advice West Oxfordshire on 1st April 2025. We believe that working together will ensure greater sustainability of our respective organisations, so we can continue to provide vital services to the communities we serve.

In addition, we are actively doing the following to improve financial stability:

Partnership Working:

- Continue to collaborate closely with local government (Town, District & County) and government agencies to secure ongoing support. Advocate for continued investment by highlighting the impact on the community, including reduced strain on other services.
- Partner with other local non-profit organisations, such as Health & Wellbeing Centres, food banks, housing and employment services and family centres, to create a network of support services. Coordinated efforts can reduce duplication and improve overall efficiency.
- Building on our already robust volunteer base will increase capacity and reach into the community.

Diversify Funding Streams by:

- Organise fundraising events, and attend community fairs. These events not only raise funds but also foster community engagement and raise awareness.
- Engage local businesses for financial support through donations, employee-giving programs, or in-kind donations.
- Launch targeted campaigns to solicit donations from individuals. Develop compelling stories that showcase the real-world impact of our services on people's lives.

Service Expansion and Innovation:

- Invest in our digital infrastructure to expand the reach of our services. This can be particularly useful for individuals who may face accessibility challenges.
- Identify unmet needs within the community and expand services (i.e rural outreach, support for the Traveller community) and seek grant funding to run the services.

Increase Grant Funding:

- Continuously search for and apply for grants, with a strong proposal, from charitable foundations, trusts, and government agencies that align with our mission and services.
- Collaborate with other local non-profits to submit joint grant applications, and combine resources and expertise. We already have a successful track record of bringing money and services to South Oxfordshire through successful County wide applications. For example, OCC funded Benefits in Place and Specialist Advice Services in partnership Age UK (projects value £100k+ pa.

Capacity Building:

- Continue to invest in the continuous training and development of staff and volunteers. A skilled and motivated team enhances service quality and attracts more funding opportunities.
- We have robust data collection and impact measurement systems that demonstrate the effectiveness of our services. We need to do more to share this evidence of positive outcomes to attract more donors, funders and projects.

This section should be read in conjunction with the OSAV CA Fundraising Plan 24/25 (Available on request).

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy

and/or a reduction in services.

Our Reserves Policy consists of Designated and Undesignated unrestricted reserves and restricted reserves. The Designated reserves have been simplified and are made up of three elements, Operating Reserves, Premises and a Development and Investment reserve. The Operating Reserve consists of four months operating expenditure and for 2024/25 amounts to £231,978. The Premises reserve provides for the cost of tenant's premises maintenance liabilities at the end of the lease periods, which amounts to £15,000. The Development and Investment Reserve covers existing and planned expenditure on new business opportunities and amounts to £25,000.

Undesignated unrestricted reserves represent the balance of free reserves after Restricted and Designated Reserves and fluctuate due to timing differences and reported outturns.

Restricted Reserves are funds received for specific purposes and not available for any other use due to a legal or contractual obligation. The main restricted reserve relates to the Local Government Pension Scheme, which is a negative reserve and reflects the view that the long term provision for the calculated pension deficit, to the extent that it ever crystallises, can be met from projected future income and therefore should not impinge on existing unrestricted reserves.

The financial statements for the financial years 2021/22, 2022/23 and 2023/24 report the following Fund balances:

	Unrestricted	Restricted	Total
2021/22	240,476	26,909	£267,385
2022/23	228,402	23,792	£252,194
2023/24	287,303	33,123	£320,426

The past three years have seen total income increase from £597,600 in 2021/22 to £627,253 in 2023/24. We have employed a fundraiser since June 2023 and they have focussed on developing new income streams, with support from other members of the staff and volunteer teams. However, the organisation is still largely dependent on one off grants or contracts for one year or less and the District Council grants are a critical element in our ability to continue to deliver the support service to our communities. Whilst we were able to terminate employment contracts for those staff funded by the contracts, we have seen other costs increasing with inflation. Our unrestricted funds have shown a 19% increase over the three years and still exceed the designated reserves included in our Reserves Policy. Our forecast outturn for 2024/25 (as at 31 Aug 2024) is a deficit of £28,715 which will deplete our reserves and offsets the surplus gained in 2023/24 of £27,232.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Citizens Advice plays a vital role in meeting the local needs of residents in South Oxfordshire (SO). This region, faces a range of challenges that make the services we provide invaluable to the community. In 23/24 Citizens Advice dealt with 5751 clients from South Oxfordshire, with 14,515 issues (see breakdown attached) resulting in 12,915 actions by our advisers. We collate data via our CRM Casebook.

Our client profile is:

- 59% female, 41% male
- 42% have a long-term health condition, 5% are disabled
- 78% are White British, 12% White Other, 4% Asian, 3% Black, 2% Mixed Ethnicity, 1% described as 'Other'.

The community need is ever present and is set to grow as the population continues to grow by estimated 14% between 2018 and 2028.

SO is home to a diverse population, including families, elderly individuals, and young professionals. This demographic diversity means that there is a wide range of social and economic issues that people encounter. Citizens Advice offers essential support by providing advice and guidance on matters such as debt management, housing, and employment rights, helping individuals navigate complex bureaucracies and make informed decisions.

Additionally, SO experiences economic disparities, with pockets of affluence alongside areas of deprivation such as Berinsfield and Didcot South East & West. Citizens Advice helps bridge this gap by supporting clients with financial literacy and access to welfare benefits advice, ensuring that vulnerable residents receive the support they need to improve their quality of life.

The district also has a significant rural population, where issues related to rural isolation, transportation, and access to services can be challenging. We help individuals in remote areas connect with resources and services, including those related to healthcare and housing, thereby enhancing their overall well-being.

Furthermore, the SO faces environmental challenges, particularly concerning sustainability and climate change. We can provide valuable information and guidance on energy efficiency and with partners, renewable energy options and sustainable living practices.

Every year we undertake a Client and Community Profile (see attached). A community profile is a picture of our local community based on information drawn from a wide range of sources. Its aim is to be an objective measure of local needs.

The client profile provides information about the people using our services, covering such issues as their age, gender and ethnicity.

Comparing the two profiles helps us to identify those parts of the community that the organisation is serving, and those it is not. Discrepancies between the two profiles are the starting point for setting our development objectives.

For example:

- Why do more women than men use the service?
- What will be the impact of the forecasted population increase on services?
- What will be the impact of the aging population?

The local need for Citizens Advice in SO is evident in its ability to address the diverse range of challenges faced by residents. We serve as a crucial resource for this community, promoting social equity, economic stability, and sustainability while enhancing the overall well-being of its residents.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We engage with clients, stakeholders and partners, in service planning and delivery as follows:

- We conduct an annual community and client profile of the district to help us to assess need and to understand the specific challenges and needs of the local community, including vulnerable and priority groups.
- We gather feedback directly from service users and this forms a critical part of service planning and improvement. There is a short form which we ask clients to fill in 'on-site' to give anonymous feedback on their experience. In addition, Citizens Advice National conducts independent evaluation of our services across South and Vale to assess client experience. This covers areas such as ease of access, progress with the case, impact on mental and physical health and also asks for other useful feedback. This is reviewed quarterly at Management Team meetings and we use the feedback to augment service delivery accordingly. In addition, we have a robust complaints process and while we receive very few complaints, these are examined to see if lessons can be learned. However, we want to do more, one of our key aims articulated in the current Business Plan is to 'Explore methods to ensure client voice is heard when developing services'.
- We have an excellent data management tool called Casebook on which all client data is held. This allows us identify trends and emerging issues. We also have access to regional and national data. This data-driven approach informs future service planning and delivery strategies.
- We encourage input from a range of stakeholders, which may include local government agencies, community organisations, charities etc. Regular meetings and forums, enable us to engage with these stakeholders e.g Communities of Practice. We gather feedback on existing services, horizon scan for emerging needs, other strategic partners and identify potential areas for improvement. We collaborate with local partners and agencies to coordinate services and support ensuring that vulnerable and priority groups receive comprehensive assistance. The set up of the Berin Centre

outreach is a prime example of this joint working with the Council and the Berin Centre.

- We have regular meetings with our funders. At District Council level this is a minimum of twice a year, more as opportunities arise. Other funders have different monitoring requirements and this provides a regular opportunity for us to report on our progress but also for funders to let us know of emerging priorities.
- We place a strong emphasis on equity and diversity. We work to ensure that their services are accessible and inclusive to all members of the community, regardless of their background or circumstances. This may involve targeted outreach to specific vulnerable or priority groups or working with partners who already have an 'in' to these groups.
- In addition to direct service provision, we engage in policy advocacy - our Research and campaigns work- to address systemic issues affecting our clients that they have told us about. This advocacy involves consultations and partnerships with relevant stakeholders and government bodies.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

We are dedicated to creating an equitable, accessible, and inclusive service for all clients, staff, and volunteers. Our Equalities policy is designed to ensure that our services meet the needs of all users, including vulnerable and priority groups. Specifically:

1. Employment and Volunteering

- **Equal Treatment:** We ensure that all employees and job applicants are treated equally and fairly, without unlawful discrimination. This includes recruitment, training, promotions, and other employment-related activities.
- **Volunteer Support:** Although volunteers have fewer legal protections, we extend our commitment to equity, diversity, and inclusion (EDI) to them, ensuring they understand their role in advancing EDI and treating clients and staff fairly.
- **Workplace Adjustments:** Where necessary we will make any adjustments to working practices, such as voice activated software where data capture is challenging manually, support homeworking and have a flexible working environment.

2. Service Provision

- **Non-Discrimination:** We do not tolerate discrimination based on protected characteristics such as age, disability, gender identity, race, religion, sex, and sexual orientation. We also consider socio-economic status, digital access, and other factors that can lead to discrimination.
- **Language:** We have access to Language Line which includes British Sign Language (BSL), as well as any other languages to overcome any communication barriers.
- **Reasonable Adjustments:** We make reasonable adjustments to accommodate the needs of disabled clients and staff, ensuring they can access our services and work environment comfortably.

3. Training and Awareness

- **Induction and Training:** All Trustees, staff and volunteers receive training on EDI principles during their induction and then have annual training thereafter. This includes understanding their rights and responsibilities under the Equality Act.
- **Ongoing Education:** We provide continuous learning opportunities on EDI topics, including unconscious bias and inclusive leadership, to ensure our team is well-informed and proactive in promoting equity.
- **Knowing our Community:** We know the people we serve by regular reporting and adjust our engagement training and accessibility accordingly.

4. Community Engagement

- **Local Partnerships:** We collaborate with local councils and community groups delivering training to help signpost clients to OSAV CA.

- **Public Awareness Campaigns:** We engage the community through campaigns, workshops, and events.
- **Outreach Hubs:** We support rural communities with regular advice surgeries within community spaces that are easily accessible to users, eliminating barriers to transportation.

By implementing these strategies and continuously monitoring our progress, OSAV CA aims to create an inclusive environment that meets the needs of all users, ensuring that everyone has equitable access to our services and support.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To ensure that Oxfordshire South & Vale Citizens Advice (OSAV CA) is successfully meeting the needs of all users, including vulnerable and priority groups, we employ a comprehensive approach that includes data collection, feedback mechanisms, monitoring, and continuous improvement. Here are the key methods we use to measure our success:

Data Collection and Analysis

- **Client and Community Profiles:** We collect and analyse demographic data on our clients and the community to identify any disparities in service access and outcomes. This helps us understand who is using our services and who might be underserved.
- **Service Usage Statistics:** We track the usage of our services by different demographic groups to ensure that our services are reaching all segments of the community, including vulnerable and priority groups.

Feedback Mechanism

- **Client Surveys:** We regularly ask clients to fill in feedback forms to gather information about their experiences with our services. These surveys include questions about accessibility, satisfaction, and any barriers they may have encountered.
- **Complaints and Compliments:** We monitor and analyse complaints and compliments to identify areas for improvement and recognise what we are doing well.

Monitoring and Reporting

- **Regular Reviews:** Our EDI policy and its implementation are reviewed annually by the Trustee Board to ensure effectiveness and compliance with legal requirements. This includes assessing whether we are meeting the needs of all users.
- **Impact Assessments:** We conduct EDI impact assessments when planning and reviewing our work to ensure our services are inclusive and accessible. These assessments help us identify potential barriers and take proactive steps to address them.

Success Indicators

- **Increased Engagement:** Higher participation rates from diverse community groups in our services and programs indicate that we are successfully reaching and engaging all segments of the community.
- **Positive Feedback:** Positive feedback from clients and community members, indicating satisfaction with our services and their inclusiveness, is a key indicator of success.
- **Reduced Disparities:** A measurable reduction in disparities among different demographic groups in terms of service access and outcomes demonstrates that we are effectively addressing the needs of all users.
- **Improved Outcomes:** Tracking the outcomes of our services, such as the resolution of issues and improvements in clients' situations, helps us assess the impact of our work on vulnerable and priority groups.

Continuous Improvement

- **Training and Development:** We provide ongoing training for staff and volunteers on EDI principles and practices to ensure they are equipped to meet the needs of all clients.

- **Policy Updates:** We regularly update our policies and procedures based on feedback and data analysis to ensure they remain relevant and effective.
- **Collaboration and Sharing Best Practices:** We collaborate with other organisations and share best practices to continuously improve our approach to EDI.

By implementing these strategies and continuously monitoring our progress, OSAV CA aims to create an inclusive environment that meets the needs of all users, ensuring that everyone has equitable access to our services and support.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

5,000

Please explain how you have determined the number of beneficiaries.

The numbers of clients/beneficiaries above refers to the number of direct, unique clients each month and then we add up the monthly numbers to produce an annual total. The client is only counted once regardless of how many advice sessions they attend that month. This is the best indication of workload and the number we use most.

We anticipate at least twice the number of secondary beneficiaries from our service. Good advice usually has a positive benefit to the household (children, partners, carers) who often also benefit from the advice given.

Social and economic factors are the most significant determinants of peoples health. The support provided by Citizens Advice also helps reduce the burden on health services by addressing issues that, if unresolved, might lead to health problems or crises. Additionally, other agencies, like housing and social services, benefit because Citizens Advice assists clients in navigating complex systems, which ultimately, should help to reduce their workloads.

We capture client numbers and other vital information through our CRM system called Casebook. In addition to client numbers it captures work type, issues, financials outcomes as well as the main demographic variable data. We usually support between 400-500 clients a month from South Oxfordshire, via various channels.

In 23/24 we saw 5751 clients. Therefore this beneficiary count for 25/26 may seen conservative. However, our Thame branch has to move to a different site for 6 months (March 25 - September 25) while building work in taking place on Market House (owned by SODC) and while move our operation, rather than close it, there will be business interpution, and this may affect client numbers.

Please describe who will directly benefit from your services/activities.

Citizens Advice provides valuable support to a wide range of people in South Oxfordshire, including vulnerable residents and priority groups. Residents can go from being not vulnerable to vulnerable very quickly - simply by a change in interest rates, loss of a job, change in family circumstances. Here's a list of different beneficiary groups and how we work with them:

Low-Income Families:

- We help low-income families access financial advice, budgeting assistance, and information on available benefits and social support programs.
- Assistance with applications for housing benefits, tax credits, and other financial aid.

Elderly Residents:

- Providing information on pensions, pension credit and related benefits and retirement planning via Pension Wise services.
- Offering advice on home adaptations, utility bills, and social care services.

People with Disabilities:

- Supporting individuals with disabilities in accessing disability benefits, accessible housing, and workplace accommodations.
- Offering guidance on the Disability Living Allowance (DLA) and Personal Independence Payment

(PIP) application processes.

- Access to British Sign Language interpreters to enable us to support our Deaf clients without fear of miscommunication or misunderstanding.
- 42% of our clients have a long-term health condition, 5% are disabled.

Unemployed Individuals:

- Offering support with Universal Credit applications and addressing issues related to benefits sanctions.

Families and Individuals in Debt:

- Providing debt counselling, debt management plans, and negotiations with creditors to alleviate financial burdens.
- Offering advice on insolvency options

Immigrants and Refugees:

- Assisting newcomers in understanding their legal rights, immigration processes, and access to social services.
- Providing guidance on language classes, cultural integration, and asylum applications.

Victims of Domestic Violence:

- Offering support to victims of domestic abuse by providing advice on legal protections, housing options, and safety planning.
- Assisting with liaising with relevant authorities.

Mental Health Service Users:

- Offering advice on managing finances and accessing benefits for individuals dealing with mental health challenges.
- Collaborating with local mental health services and advocacy organisations.

Isolated and Vulnerable Individuals:

- Reaching out to isolated residents who may have difficulty accessing services and connecting them with appropriate support networks.
- Partnering with local charities and community groups to provide outreach services.
- We are a hate crime reporting centre and all our advice hubs are designated 'Safe Spaces'.

Minority and Ethnic Groups:

- Ensuring that language-specific and culturally sensitive advice services are available (i.e Language Line, translated literature).
- Promoting inclusivity and diversity awareness within the community.

Rural Communities:

- Extending services to remote and rural areas in the Vale of White Horse through remote consultations.
- Addressing unique rural challenges related to housing, transportation, and access to services.

Citizens Advice works closely with local authorities, social services, healthcare providers, and community organisations to reach and assist these beneficiary groups effectively. Collaboration ensures that vulnerable residents and priority groups receive the necessary support and information to improve their quality of life.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

We can demonstrate this in the following ways:

- We offer a wide range of information and guidance to individuals on various issues, including housing, debt management, employment rights, and benefits entitlements. By providing people with the knowledge and tools to address problems early, we help prevent issues from escalating to a point where they require intensive Council intervention.
- Through debt management advice and budgeting support, we help residents manage their finances more effectively. This reduces the risk of individuals falling into crisis, and the need for emergency Council assistance, such as emergency accommodation or access to crisis funds. Council Tax arrears are the number one debt issue in South Oxfordshire!

- We assist residents in accessing the benefits and entitlements they are eligible for, ensuring that they receive the financial support they need. This not only improves the well-being of individuals and families but also reduces the strain on Council programmes and social services. We also help clients access other crisis funds.
- We have specialized advisers who can offer expert guidance on complex issues, such as PIP applications and mandatory reconsiderations, housing issues and employment related matters. This helps individuals navigate intricate processes and legal requirements.
- In recent years we have worked in partnership with the Community Hub at the Council. We have either assessed and provided access to the Household Support Fund for clients or linked them directly with other local charities to provide support often with direct referrals from the Community Connectors team.
- We support clients to mediate and reach amicable resolutions with those they may be in conflict with. For example, we frequently offer support around antisocial behaviour of neighbours e.g loud music, barking dogs. We can guide clients on how to try to deal with this type of situation for themselves, where appropriate, hopefully preventing escalation to the Council. We also guide tenants (social & private) on how to liaise with landlords to get a problem rectified.
- We collaborate with SODC, sharing data and insights to identify emerging trends and community needs. This proactive approach enables Councils to allocate resources more effectively and develop targeted policies to address specific challenges.

In terms of financial outcome, in the 23/24 financial year, we have recorded an Income Gain for South Oxfordshire clients of £1.76m (e.g. Benefit or Tax Credit, access to charitable funds, social welfare, dispute resolution). We also facilitated over £294k of debt write off. This is practical, measurable, real support for those most in need in our community. We also know, using a cost benefit model used by HM treasury that for every that for every £1 invested in our services last year there is a £4.61 in savings to government and public services (fiscal benefits).

In summary, our work complements Council services by providing preventative, supportive, and educational resources that empower individuals to address problems independently, ultimately contributing to the overall well-being and self-sufficiency of the community.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

We play a crucial role in providing support and guidance to residents, helping them navigate various challenges they may encounter. These outcomes encompass a range of areas, all aimed at supporting those who live in South Oxfordshire (SO) to be part of a thriving and healthy community:

- Free, impartial, accessible advice services for residents: We aim to empower residents with knowledge and information, enabling them to make informed decisions about their lives. By strengthening individuals and families, we contribute to building a more resilient community.
- Provide a quality service that clients would recommend to others: People will not choose to contact us if they know of others who have had a poor experience, therefore maintaining a good 'recommendation' score is crucial to ensuring we remain a trusted partner in the community.
- Provide a fundraising plan: The District Council will fund 33% of our operational costs, approximately 40% of our operational costs are met by other significant contracts. Therefore, we need a clear diverse plan of how we will secure the remainder to maintain this critical service.
- Work towards reducing our carbon emissions: It's important for voluntary organisations to reduce carbon emissions because they can lead by example, inspiring broader community action and contributing to the collective fight against climate change. This will also enable us to ensure best practice learnt from this exercise can be spread across the County operations of Citizens Advice.

- Raise awareness of the service and other pressing issues through community events: By attending community events, and working with strategic partners, we hope to raise awareness about our work and campaigns. Through this community work we will reach new and more diverse audiences who could be future clients or team members and strengthen our working relationships with partners.
- Easy access to free advice services: We aim to offer services through a variety of channels. We want to make it as easy as possible for clients to access us. We offer in-person, email, webchat or phone services 5 days a week. Website and chatbot available 7 days a week.
- Improved mental health as a result of advice provided: Many of the challenges residents face can lead to stress and anxiety. Our support aims to alleviate this emotional burden, leading to improved mental health outcomes for individuals and families.
- Income gain for clients: We expect an improvement in the financial stability of residents. By offering expert advice on budgeting, debt management, and benefit entitlements, we aim to help individuals and families gain control over their finances and increase their overall economic security.
- Deliver quality advice by having a well-supported and managed staff and volunteer team.
- Deliver quality advice by having knowledgeable, experienced and well-trained staff and volunteer. We can only achieve the previous 10 points by having a highly trained and experienced team that work to the Quality Advice Standard.
- Engaging effectively with clients and stakeholders to ensure clear, consistent messaging that aligns efforts, manages expectations, and objectives.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Oxfordshire South & Vale Citizens Advice recognizes the importance of collaboration and partnership in delivering comprehensive services to our community. In our quest to deliver vital services, we are committed to forging strong alliances with various stakeholders. We work with a number of agencies and organisations to complement the advice we give without duplicating the provision of service.

Examples of this includes our partnerships with the Sharing Life Trust, NOMAD, Wallingford Food Bank and Didcot Community Kitchen who all provide a service for those experiencing financial crisis or hardship, who are referred to Citizens Advice for the specialist advice. Our other partnerships include Health Professionals, social prescribers, and other place-based health organisations as part of the 'Benefits in Place' project funded by Oxfordshire County Council. The project aims to reduce the health inequalities of individuals suffering financial hardship, by receiving referrals from the partners.

South Oxfordshire residents also benefit from other funded OSAV CA projects; these include regulated Debt Advice (funded by Money and Pensions Service) and OCC Money Advice Programme (funded by Oxfordshire County Council). In total these projects bring over £100k worth of services into South Oxfordshire.

We work with a number of partners, including Town Councils, Job Centres, MIND, AGE UK, Housing Associations, foodbanks, larders, Better Housing - Better Health. We are also an active member of the Communities in Practice (CoPs) group. CoPs bring together people who work with adults in the community.

We collaborate closely with the Community Enablement Team at South and Vale and provide mutual support where we can. For example, distribution of Household Support Fund. We can ensure that our services align with community needs and priorities. This collaboration facilitates the efficient allocation of resources and information sharing, ultimately leading to more effective service delivery.

We will continue to scan the horizon for new opportunities with other non-profit organizations and charities that share our mission and serve overlapping client populations. We can reduce duplication of services and increase the overall impact of our programs, promoting a holistic support system for those in need. We will also explore partnerships with local businesses. These partnerships can involve financial support, in-kind donations, or volunteer engagement, all of which contribute to the sustainability of our work.

Please outline your plans/ideas of how you will continue to develop your service in collaboration

with others to become more financially sustainable in the future.

As described in section 4, our most relevant development in terms of becoming more financially sustainable for the future is the merging of Oxfordshire South & Vale Citizens Advice with Citizens Advice West Oxfordshire and Citizens Advice Oxford from April 1st 2025. We believe this will drive impact as well as economic resilience of the service. We believe that working together will ensure greater sustainability of our respective organisations, so we can continue to provide vital services to the communities we serve.

In addition to this we have a current strategy which focuses on strengthening partnerships with local authorities, community led provision (carers support, social prescribers, VCS support, other advice agencies) health & wellbeing providers (both formal & informal), and commissioned services. By working closely with these agencies, we aim to develop integrated service models that improve client outcomes while generating funding opportunities through joint bids for grants and public funding. This approach not only extends our reach but also demonstrates value to our stakeholders, encouraging future investment.

Additionally, we have been working very hard to develop partnerships with local companies, and where appropriate, explore collaborations, for example with those that provide legal services. By establishing partnerships with local businesses, we can explore developing services that provide mutual benefit. These partnerships could potentially yield sponsorships or donations, directly supporting our operations.

We are also looking at the potential advantages of entering into partnerships, that focus on regional opportunities. These include new projects due to be commissioned in 2025 with the Ministry of Justice for probation services. These projects will be multi agency as well as having delivery partners from both the public and private sector.

To complement these partnerships, we are investing in digital infrastructure to increase service efficiency. The aim is that through digital innovations, we will reach a wider audience at a lower operational cost. This helps us become less reliant on fluctuating funding sources and more adaptable to changing demand.

Ultimately, we believe that by fostering meaningful, diverse collaborations and embracing technology, Oxfordshire South & Vale Citizens Advice can enhance financial sustainability and continue to be a dependable resource for our community.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We are committed to reducing our environmental impact and promote sustainability. This report outlines our key achievements to date:

Recycling of Materials

- Paper and Cardboard: OSAV CA has implemented a robust recycling system for paper and cardboard, ensuring maximum recycling while maintaining confidentiality.
- Other Materials: We have established recycling protocols for glass, plastic, tins, batteries, and printer cartridges. Specific recycling bins are labelled and strategically placed to encourage use.
- Electronic Communication: To minimise paper usage, we have increased the use of electronic communication and documentation.

Disposal of Waste

- Reuse and Repair: We encourage the reuse and repair of products to avoid premature disposal. Redundant IT equipment is donated or recycled following data protection protocols.
- Landfill Reduction: Measures are in place to minimise landfill use, including offering used equipment to other offices or other charitable organisations.

Transport

- Public Transport and Car Sharing: We encourage car travel to necessary trips only, promoting the use of public transport and car sharing. Training venues and meeting locations are chosen for their accessibility by public transport or local to those attending.

- Teleconferencing: The use of teleconferencing has been increased to reduce the need for face-to-face meetings, thereby cutting down on travel emissions.

Use of Energy

- Energy Efficiency: Efforts have been made to reduce energy consumption across all premises. This includes replacing old light bulbs with low-energy alternatives and enabling energy-saving features on computers and copiers.
- Building Management: We work with building managers to improve the energy efficiency of the premises we use, including draught-proofing and maintaining heating systems.

Use of Water

- Water Conservation: Measures to reduce water usage have been implemented, such as encouraging staff to use washing-up bowls and wash in bulk rather than individually.

Suppliers and Purchasing

- Ethical Procurement: Where possible we use suppliers with ethical environmental working practices and as local as possible thereby cutting down on emissions impacts.
- Utilities: Being SODC tenants (Thame) we subscribe to your ethical principles and support your use of Green Suppliers where possible. We promote turning off lights in rooms not being used and turning down thermostats that are in our control.

Awareness and Education

- Training and Engagement: Staff and volunteers are trained on environmental issues to maximise the impact of our sustainability efforts.

Working Practices

- Paperless Systems: We operate a paperless finance system and encourage a limited amount of paperwork when recording client information.
- Investment: We are investing in software that will limit printing of client documentation which will also help users who struggle with paperwork to engage in achieving better client outcomes.

Community Engagement

- Public Awareness Campaigns: We engage the community through public awareness campaigns, workshops, and events focused on environmental education and sustainable practices.

Action Plan Outcomes

- Annual Review: The action plan is reviewed annually to ensure progress and adapt strategies as needed. Each set of actions has specific targets based on our operations.

<p>Reducing the Risk of Domestic Abuse known as Reducing the Risk</p>	<p>Ref: SRev25-27/55</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. There is no funding shortfall identified in the budget - we have a number of options for alternative funding streams if any of the funding applications do not transpire. We accept that not all funding applications will be successful but have kept a number of trusts, that we have good relationships in reserve, should any primary funding routes not take place. We will also manage and reduce costs if required to ensure a balanced budget. We are actively driving up income from training and diversifying our income.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. To improve the financial stability of our charity, we are implementing a robust and diversified income strategy, ensuring long-term sustainability and resilience. Our approach includes the following elements:</p> <p>Business Friends and Training Packages</p> <p>We will actively engage businesses across South Oxfordshire to become "Business Friends," fostering partnerships where businesses support our work through financial contributions. Additionally, we will offer DA Aware and Torch Bearer training packages, designed specifically for businesses to raise awareness about domestic abuse in the workplace and equip them with supportive practices. This initiative not only raises vital funds but also expands local awareness and involvement in keeping victims who are their employees safe.</p> <p>Diversified Income Streams</p> <p>Our strategy focuses on diversifying income across multiple sources:</p> <ul style="list-style-type: none"> • Grants and Commissioned Funding: We are pursuing long-term grant funding and commissioning opportunities with a focus on securing multi-year agreements, reducing our dependency on any single funding source. We have a number of long term commissions and trust funding already in place. • Community Fundraising and Individual Giving: We will strengthen our community fundraising efforts and expand individual giving initiatives, encouraging local residents to contribute and engage on a personal level. <p>Long-term Financial Planning and Partnerships</p> <ul style="list-style-type: none"> • Our charity aims to establish enduring relationships with funders, businesses, and community supporters. We will also enhance our long-term financial planning capabilities, allowing us to anticipate and adapt to funding trends and opportunities proactively. <p>Through this comprehensive and flexible financial model, we will strengthen Reducing the Risks stability, enabling us to continue delivering critical services and expanding our impact on domestic abuse prevention and recovery in South Oxfordshire.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. 2021-2022 income £367k. The Charity continued to operate in a funding environment heavily affected by the pandemic. Our 2019-22 business plan had been to continue to attract longer term grant funding for our core services, while diversifying our fundraising and in particular growing our training service as a sustainable enterprise. However we had to adapt rapidly in light of COVID19. We needed to expand our capacity to meet the increased need. This entailed incurring more costs. At the same time we had to suspend our training</p>	

contracts, thereby losing income, and many grant streams changed their focus from long term support to meeting immediate need. The trustees placed their three year business plan on hold and moved rapidly to access the new short term COVID related income streams being developed by Charitable Trusts, and provided by the Government.

2022 - 2023 Income £466,984

The impending new Oxfordshire County Council commissioning of our core IDVA service necessitated an interim 2022/23 strategy: adoption of a longer-term strategy was dependent on the outcome of the commissioning. Our 2023/26 strategy was developed and agreed at the end of the year, with the help of the new CEO, who progressively took over operational management of the charity with 2022/23 special objectives to lead the bid for the Oxfordshire County Council tender for IDVA services and grow the training portfolio and training sales. The increase in management overhead and transition to a new post COVID funding environment meant that we entered 2022/23 with an expectation of a significant deficit but one consistent with keeping within our reserves policy. In the longer term we had good prospects for winning a three year contract from the County Council, which in the event we did.

2023-2024 Income £559,992

The year was the first of a three year strategy grounded on the secure base of a 3-year contract with Oxford County Council for provision the high risk IDVA service. This provided over half our income for the period and was complemented with an increase in support for Court IDVA support, the DA Friends outreach to local communities, and continuing work to develop Training and Champion Network sales as a social enterprise. Statutory income streams - either Oxfordshire County Council or the PCC – increased to nearly 62% of our revenue. Our strategy until now has been to not become over dependent on any one source.

Nevertheless, there was no avoiding bidding for the County Council High Risk IDVA service which, going forward, has the effect of making the Council responsible for about half of our revenue. Mitigating this dependence, the contract gives us a minimum of three years and probably 5 years of assured income for the core (non-court) IDVA service.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

The need for domestic abuse support services in South Oxfordshire is evident in local strategic priorities and demographic realities. According to the South and Vale Community Safety Partnership Plan (2022-2025), domestic abuse is a major focus due to its significant impact on violent crime statistics and its long-term detrimental effects on families. With approximately 1,374 incidents of domestic abuse recorded in South Oxfordshire alone in 2022, the persistence of repeat incidents (32% of victims experienced multiple occurrences) highlights the urgent need for both preventive and ongoing support interventions.

Our approach aligns closely with local and council plans. The South Oxfordshire Corporate Plan (2024-2028) emphasises "Thriving and Healthy Communities," which includes the wellbeing and safety of residents, especially the vulnerable, through community support, safety initiatives, and direct intervention. Our domestic abuse services, including high-risk support, court-based IDVA service, and therapeutic recovery, directly address this aim, supporting not just individuals but the community's overall health and resilience.

We have engaged with the South Oxfordshire Community Safety Partnership who is very supportive of this application due to the lack of service provision for South Oxfordshire residents.

We remain flexible in adapting to emerging needs, conducting ongoing assessments of service effectiveness and expanding community engagement. Our Community and Friends Officer plays a key role in bridging gaps in awareness, encouraging disclosures, and fostering a supportive network of DA Friends who help integrate localized support into everyday community interactions. This approach ensures that as the community's needs evolve, our support remains responsive and community-informed.

Our services contribute to achieving the goals set out in the South and Vale Community Safety Partnership and the South Oxfordshire Corporate Plan by enhancing the safety, wellbeing, and resilience of the community, aligning with local authorities' dedication to protecting and empowering vulnerable residents in South Oxfordshire.

Please explain how your service users and other stakeholders/partners, where appropriate, have

been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Our service planning and delivery are grounded in thorough consultation and engagement with our service users, stakeholders, and partners, with particular attention to vulnerable and priority groups. Here's how we ensure their voices are central to our work:

Service User Feedback and Consultation

- Regular Service User Feedback: We gather structured feedback through surveys and conversations with individuals accessing our services who live in South Oxfordshire, ensuring we continually adjust to meet their evolving needs.
- Collaboration with Health and Social Services: We work with GPs, and social prescribers to help identify at-risk individuals, including those who may not yet be accessing our services. These partnerships give us insights into the needs of diverse groups, such as older, isolated individually, economically disadvantaged, and disabled victims.
- RtR Network: Through our RtR Network partnership, we coordinate with local agencies to provide comprehensive support, sharing expertise to address specific needs within priority groups like young families and economically disadvantaged individuals.

Community and Friends Support Network:

- DA Friends Network: Our DA Friends volunteer network comprises local residents trained to offer initial guidance and support disclosures within their communities. These volunteers are regularly consulted on the needs they observe among vulnerable groups, helping us identify service gaps and tailor our approach for those not currently accessing services.
- Local Business Engagement: Our Business Friends initiative engages local employers, who provide feedback on employee welfare, particularly concerning economically disadvantaged and migrant workers. These insights help us adapt our DA Aware training and support programs to meet workplace needs.

Training and Professional Engagement

- Professionals Working with Vulnerable Groups: We provide training to professionals who serve vulnerable populations, including social workers, educators, and health professionals. These stakeholders play a key role in identifying needs and providing feedback on how to make our services more accessible to individuals facing barriers.

Outreach to Under-Served Groups

- Community-Based Engagement: We conduct awareness events and information sessions in rural areas and local community centers. Engaging in these settings allows us to gather input from groups that may not actively seek our services but could benefit from them.

This inclusive, feedback-driven approach ensures that our service users, stakeholders, and partners actively shape our planning and delivery, resulting in services that are relevant, accessible, and effective for South Oxfordshire's diverse needs.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Our commitment to Diversity, Equity, and Inclusion (DEI) are central to ensuring our services meet the needs of all users, with a special focus on vulnerable and priority groups. Here's how we integrate these principles into our service delivery:

Research

To ensure that our services are informed by the lived experiences of diverse communities, we conduct and commission targeted research. As lead authors on a comprehensive study of barriers that LGBTQIA+ individuals face in accessing domestic abuse support, we gained critical insights into issues such as fear of being outed, social stigma, and concerns about inclusivity in mainstream services (Final LGBTQIA+ Research). Additionally, we commissioned research from Birmingham University on older victims in rural areas to understand how isolation, limited resources, and age intersect with domestic abuse risks. These insights guide the development of more inclusive practices, enabling us to adapt our programs to the unique challenges faced by these communities.

Inclusive Training on LGBTQIA+ Issues and Domestic Abuse

We deliver training on supporting LGBTQIA+ individuals affected by domestic abuse, equipping our team and community partners with knowledge on the distinct forms of abuse and control within LGBTQIA+ relationships. This training covers issues such as identity abuse, social isolation, and unique vulnerabilities faced by LGBTQIA+ individuals. Furthermore, we have developed educational videos and materials focused on domestic abuse in minoritized communities, which address common barriers like language obstacles, mistrust in services, and fear of stigma (Diversity Report). By incorporating findings from our research into training content, we ensure that staff and volunteers are prepared to offer respectful, competent, and empathetic support.

Tailored Outreach and Engagement for Priority Groups

We prioritise inclusive outreach to engage groups who may be less likely to access services. Based on our research findings, we hold awareness events in rural areas and community centers, providing culturally and linguistically appropriate information. Our videos and materials are accessible across a range of digital platforms, making them available to individuals who may not attend in-person events but are interested in learning about support options.

Collaboration and Multi-Agency Partnerships

We collaborate with organizations such as the RtR Network, GPs, and social prescribers to coordinate support for at-risk individuals, particularly those who may face additional barriers due to age, rural location, or LGBTQIA+ identity (Final LGBTQIA+ Research...). These partnerships amplify our reach and ensure that we can identify and engage individuals who may not otherwise access our services.

Continuous DEI Monitoring and Feedback

We implement ongoing DEI monitoring and feedback processes, tracking demographic data to ensure that our services are reaching those who historically face structural inequities. Regular feedback from service users and community partners helps us refine our approach to be more inclusive, adaptable, and responsive to evolving community needs.

Creating Safe Spaces through Inclusive Messaging

Our materials, videos, and training programs emphasise inclusive language and visual representation to foster a welcoming environment. By clearly signaling our commitment to inclusion, we aim to build trust among LGBTQIA+ individuals, older adults in rural areas, and other minoritized groups.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To measure our success in meeting the needs of all users, including vulnerable and priority groups, we employ a comprehensive evaluation framework. This framework uses service user feedback, demographic tracking, outreach assessment, partner collaboration, and advisory input to ensure our services are accessible, inclusive, and effective.

Service User Feedback and Satisfaction

Collecting regular feedback through surveys, focus groups, and interviews with service users—especially from vulnerable groups such as older adults, LGBTQIA+ individuals, isolated families, and economically disadvantaged persons—helps us gauge satisfaction and identify areas for improvement. High satisfaction scores and positive feedback from these groups indicate that we're effectively meeting diverse needs. Constructive feedback from these channels allows us to adapt quickly, ensuring our services remain responsive.

Demographic Tracking and Inclusivity

Using our DEI monitoring practices, we track demographic data, usage rates, and engagement across user groups. By reviewing this data, we can assess if specific priority groups, such as LGBTQIA+ individuals or rural older adults, are accessing services at higher rates. If we observe consistent engagement from previously underserved groups, it confirms that our outreach and accessibility efforts are successfully reducing barriers.

Outreach and Awareness Goals

We set measurable goals for outreach events, partnerships, and training participation, and track progress. Success in this area includes increased event attendance, greater referral volumes from partners, and higher participation in training programs. Strong engagement with our awareness videos and resources, particularly from targeted audiences, further shows that our message reaches those who might not otherwise attend in person.

Partner and Stakeholder Feedback

We rely on feedback from partners, such as GPs, social prescribers, and the RtR Network, to ensure our coordinated support efforts are effective. Positive feedback and a steady stream of referrals from these partners indicate that our multi-agency approach is aligned with community needs and effectively serves priority groups.

Advisory Insights from Lived Experience

Our Lived Experience Advisory Group, with members from varied backgrounds, meets regularly to review our impact. This group’s insights help us shape services that remain user-centered and address the real needs of those affected by domestic abuse. Implementing their recommendations demonstrates our responsiveness and commitment to continuously improving our approach.

Training Outcome Evaluation

Outcomes from our training programs, particularly around supporting LGBTQIA+ and minoritized communities, are measured by assessing knowledge retention, confidence, and preparedness among staff and community partners. Success in this area is reflected in increased confidence among trainees and a rise in referrals from professionals who recognize signs of abuse among priority groups.

Reduction in Barriers for Priority Groups

We measure reductions in barriers like stigma, lack of culturally appropriate resources, and fear of discrimination. Follow-up assessments track these changes, and if users report fewer barriers over time, it confirms that our approach is fostering inclusivity and accessibility.

Through these metrics, we can verify that our services meet the evolving needs of South Oxfordshire’s diverse communities, continually refining our programs to ensure their effectiveness and inclusivity for all users.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

1,270

Please explain how you have determined the number of beneficiaries.

- 110 residents accessing DA Friends sessions from community sessions.
- 50 new professional RtR DA Champions in South Oxfordshire organisations to improve their response to domestic abuse
- 80 South Oxfordshire residents supported via drop ins across the district
- 30 residents accessing domestic abuse recovery programmes
- 1,000 South Oxfordshire employees supported by having policies and trained managers in place in their businesses

Please describe who will directly benefit from your services/activities.

Elderly Isolated Young Families, Including Those Experiencing Domestic Abuse

Isolated young families face unique challenges, particularly when experiencing domestic abuse, as they often encounter barriers to accessing support and resources. There is an over representation in the high-risk service for individuals with families in South Oxfordshire. This work will complement the work of the high-risk team.

Elderly Individuals

Older victims, especially those in rural areas, often experience isolation and limited access to support networks, which can leave them vulnerable to abuse. Our partnerships with local agencies and insights from commissioned research on older victims in rural settings allow us to address these specific challenges. Our Community and Friends Officers role came about because of an uptick in older individuals accessing our high-risk service.

Homeless and Economically Disadvantaged Individuals

Homeless and economic disadvantage go hand in hand with domestic abuse. Working with partners at the DWP we will support individuals suffering domestic abuse to access housing and are accessing the correct financial support.

Migrant Communities

Migrant communities face unique obstacles, including language barriers, cultural stigma, and limited awareness of available resources. Our outreach strategy includes support from our Diversity lead who is developing accessible assets and information.

Individuals with Disabilities and Impairments

Those with disabilities or impairments encounter specific barriers to accessing domestic abuse services, such as physical limitations and lack of specialized resources. Our IDVAs offer home visit support, ensuring accessibility to individuals who may face mobility issues or other physical challenges. Additionally, our training for health and social care providers raises awareness about the specific needs of disabled individuals, fostering a more inclusive support environment.

LGBTQIA+ Individuals

While not always formally recognized as a priority group, LGBTQIA+ individuals face significant barriers, including fear of discrimination and concerns about being outed. Our services are informed by research into these unique challenges.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Our services and activities directly complement council services by addressing the needs of vulnerable and priority groups in the community, providing specialised support that aligns with council goals of fostering safe, resilient, and connected communities. By offering targeted domestic abuse support and preventative programs, we reduce the likelihood of these individuals requiring crisis intervention or long-term support from the council. Here's how our services add value to existing council efforts:

This Community and Friends Support Network

Our Community and Friends support network includes trained DA Friends, local volunteers who provide guidance, facilitate initial disclosures, and direct individuals to available resources. By embedding this network within the community, we make it easier for individuals to access early support, often addressing issues before they escalate to a level that requires council intervention. This approach fosters a culture of local awareness and informal support that decreases isolation, prevents crises, and reduces reliance on council services by encouraging community-led solutions.

Business Friends Initiative and Training Programs

Our Business Friends initiative engages local businesses, offering domestic abuse awareness training and support packages that equip employers to recognize signs of abuse and offer guidance to affected employees. This program fosters safer work environments, enabling businesses to play an active role in early intervention, which, in turn, reduces the need for council resources to address issues related to employment instability, economic hardship, or homelessness that can result from unaddressed abuse.

Therapeutic Recovery and Drop-in

Our therapeutic recovery services provide spaces for individuals to heal and contribute to shaping services. Therapeutic recovery programs reduce the likelihood of individuals requiring long-term mental health support from council services by helping survivors build resilience and regain stability.

The drop in will support and advice residents and guide them to relevant services reducing the need to

Speak with housing officers for advice.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our project aligns with South Oxfordshire District Council’s Corporate Plan theme of “Thriving and Healthy Communities” by delivering a sustainable, high-impact programme to support all victims of domestic abuse, strengthen community resilience, and empower professionals and local businesses. Through the DA Friends and RtR Champions Networks, IDVA-led drop-in sessions, recovery support groups, and partnerships with local employers, we provide consistent, community-based services embedded in our organisation’s mission. These are not one-off initiatives; they are core to our work, ensuring long-term positive impact on community health and wellbeing.

Key Components and Outcomes

Community Outreach through the DA Friends Network

The DA Friends Network mobilises trained community volunteers who provide guidance, encourage disclosures, and connect individuals to resources. By engaging 50 residents in 2025/26 and increasing to 60 by 2026/27, we are building a peer-support system that fosters sustained community engagement. Tracking demographic data and gathering regular feedback ensures inclusivity and adaptability. This community-driven approach directly supports the Council’s goal of promoting sustainable community health and safety.

Professional Development with the RtR Champions Network

Building on existing relationships, we aim to train 25 local professionals each year as RtR Champions. These Champions come from sectors such as healthcare, social work, and education and are trained to recognise and respond effectively to domestic abuse. With a target of 90% of professionals reporting increased confidence (measured through pre- and post-training surveys), this network strengthens our local response to domestic abuse, creating safer, healthier communities through sustained professional engagement.

Access to Immediate Support via IDVA-Led Drop-In Sessions

Our IDVA-led drop-in sessions provide all residents, not just those at high risk, with immediate, local support. These sessions are accessible to anyone affected by domestic abuse, offering guidance on safety planning, emotional support, and information on available resources. With a target of 40 residents accessing these services annually, we provide timely, face-to-face assistance to prevent crises and improve wellbeing. This accessible support reduces reliance on council intervention, with a goal of 85% user satisfaction, measured through feedback forms and case studies.

Therapeutic Recovery Support Groups

Our recovery groups offer a structured environment for survivors to heal, build resilience, and regain control over their lives. We aim to reach 30 participants each year, with 80% expected to report improved wellbeing. Through wellbeing surveys and demographic tracking, we monitor the impact of these sessions and adapt to emerging needs. This support addresses mental health, contributing to the Council’s objectives of creating healthy, thriving communities.

Business Friends Initiative and Policy Development

Our Business Friends initiative, we engage 500 employees across participating businesses, helping employers develop policies and support systems for staff affected by domestic abuse. This approach fosters a workplace culture that is aware of and responsive to domestic abuse. We will monitor policy changes, gather feedback from businesses, and measure employee engagement, strengthening both workplace resilience and the broader community’s wellbeing.

Financial Sustainability

To ensure the project’s financial sustainability, we will develop and update an annual fundraising and income gen plan with a diverse funding plan.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Our organisation is deeply committed to partnership working, collaboration, and co-production, which are central to our culture and approach to delivering services effectively. Through partnerships with local people, public sector bodies, and other voluntary organizations, we co-design and deliver programs that are responsive, sustainable, and aligned with the council's Corporate Plan theme of "Thriving and Healthy Communities".

Co-Production with Service Users through Lived Experience Advisory Group

We will develop a Lived Experience Advisory Group, made up of individuals who have experienced domestic abuse, plays a critical role in designing our services. Their insights will help us shape programs to be survivor-centered, relevant, and sensitive to the realities faced by those affected by domestic abuse. This co-productive approach ensures that our services are not only effective but also empathetic and informed by real experiences, promoting a sense of ownership and empowerment among participants.

Collaboration with Local Authorities and Health Services

We work closely with GPs, pharmacies, social prescribers, and the South Oxfordshire Community Safety Team to ensure early intervention and streamlined support for high-risk individuals. These collaborations enable us to identify and support those at risk more effectively, ensuring they can access safety planning, therapeutic support, and recovery programs.

Partnership with the RtR Network for Multi-Agency Support

We currently have over 200 RtR Champions in South Oxfordshire. The network strengthens our community response by coordinating efforts with other local agencies. This multi-agency approach ensures comprehensive support, as we pool resources and expertise to create a seamless safety net for victims of domestic abuse. Through this collaboration, we are able to offer an integrated service, from high-risk IDVA support to therapeutic recovery, helping residents access the full spectrum of available resources.

Community-Based Support with DA Friends Network

The DA Friends Network is a community-driven initiative where trained local volunteers support individuals by offering initial guidance, facilitating disclosures, and connecting them with relevant resources. These volunteers are regularly updated on best practices and collaborate with local businesses and community groups to increase domestic abuse awareness and support. This partnership with community volunteers reduces isolation, increases accessibility, and empowers residents to build a local support system, decreasing the demand on council crisis services.

Business Engagement through the Business Friends Initiative

Our Business Friends initiative involves local businesses in domestic abuse awareness training, helping them develop workplace policies and offer support to employees affected by abuse. This partnership encourages a community-wide approach to tackling domestic abuse, raising awareness, and fostering supportive workplace environments. Local employers play a crucial role in this effort, as they help build a safer and more resilient community by actively participating in prevention and support measures.

Training and Capacity Building with Other Voluntary Organisations

We regularly offer training to other local voluntary organisations, social workers, and health professionals, equipping them with the knowledge and skills to respond to domestic abuse confidently. This collaboration strengthens the community's overall capacity.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

To ensure long-term sustainability and growth, we are committed to developing our services in collaboration with partners and diversifying our funding streams. Here are the key elements of our strategy to build financial resilience while enhancing service impact:

Expansion of the Business Friends Initiative

We will continue to expand our Business Friends initiative, partnering with more local businesses to raise domestic abuse awareness and provide specialized training in recognizing and supporting affected employees. This program generates revenue by offering tiered membership packages, where businesses receive benefits such as domestic abuse training, policy guidance, and resources for their staff. By deepening our engagement with local employers, we not only create additional income but also foster a supportive workplace culture that aligns with our mission and reduces community-wide risk factors.

Paid Training Programs for Professionals

Building on our successful community training, we plan to offer paid domestic abuse awareness and response training for professionals across various sectors, including healthcare, education, and social work. Our comprehensive training program will provides practical guidance on how to identify and address abuse and is tailored to meet the specific needs of different professions. By charging a fee for this specialized training, we generate revenue while empowering professionals to better support vulnerable individuals, creating a safer community and reducing long-term demand for council services.

Enhanced Community Fundraising Efforts

We will increase our community fundraising efforts by organising awareness events and campaigns, encouraging residents to support our cause through regular giving, local events, and targeted appeals. Activities like sponsored challenges, social media campaigns, and community events not only raise funds but also increase our visibility and engagement. This expanded presence strengthens our support base, making our financial model more resilient and less reliant on single sources of funding.

Securing Multi-Year Grants and Commissioned Funding

Our strategy includes seeking multi-year grants and commissioned funding agreements with local councils, foundations, and national organisations. We will continue to work closely with funding bodies that align with our mission, highlighting the impact of our collaborative, community-based approach. Multi-year agreements provide stable funding that allows us to plan long-term, expand services as needed, and implement programs that have enduring community benefits.

Leveraging Digital Resources for Wider Outreach and Efficiency

We aim to scale our digital services, including our eLearning training modules. This digital expansion provides accessible options for users and businesses, allowing us to increase service capacity and generate revenue through online programs.

By diversifying funding sources, strengthening partnerships, and optimising resource use, we ensure our services remain impactful, accessible, and financially sustainable, ultimately supporting the council's vision for thriving, healthy communities.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We use video for the majority of meetings

Staff only drive when necessary

We use a shared office which has implemented Carbon reducing measures as per Oxford City recommendations

We print very few materials

<p>SOFEA</p>	<p>Ref: SRev25-27/45</p>
<p>Financial Review</p>	
<p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p>	
<p>Since 2020, SOFEA's total income has been evenly split between contracts and grants (with "other income" representing less than 1% of total income).</p>	
<p>Activities to secure the 50% of our income, through contracts and revenue, is supported by all Heads of Department who are responsible for their own budgets, including securing increased contract income where possible. Since 2019, contract and revenue growth has risen from £546,000 to £1.55m, reflecting the increased demand for our interconnected services.</p>	
<p>Any suggested shortfalls for 2025-26 at this stage, and particularly for 2025-26, are considered as part of our overall income and fundraising strategy and planning, to meet the operating costs and overheads of our 12 programme departments, 2 regional offices and the central head office functions.</p>	
<p>SOFEA's contracts are negotiated and agreed annually with Activate Learning and Milton Keynes College (education), DWP (employability) and Oxford Health and Didcot Primary Care Network (wellbeing) have been in place. Whilst we are confident that these contracts will continue as they have for almost 10 years, we cannot state that they are secure for 2026/27 (although highly likely).</p>	
<p>The growth of our Community Larder network across areas of multiple deprivation proves that food poverty and insecurity effects more people, many of whom are experiencing difficulties for the first time as a result of the cost-of-living crisis. Our food-related income is forecast to rise as more larders are opened and new community partners (homeless shelters, care homes, hospices, schools, etc) buy more food through our FareShare operations.</p>	
<p>Activities to secure the 50% of our income, through grants and donations, is led by our Business Innovation Team.</p>	
<p>Having historically relied on trusts and foundation for our grant income, these funders are now under increasing demand from a greater number of applicants. Similarly, as we have grown, some funders are no longer available to us – limiting their support to organisations under specific income levels.</p>	
<p>Our Business Innovation Directorate was formed in July 2023 and has succeeded in securing strategic grants from national trusts & foundations, corporations and individual major donors. A number of these are multi-year and unrestricted grants.</p>	
<p>Our growth of grants income from £654,000 to £1.53m over the last 5 years, reflects the commitment from grant makers to fund our proven programmes as well as allowing us to develop innovative solutions to interconnected, entrenched and complex social issues.</p>	
<p>We are confident that our continued development of strong relationships with grant funders will see our future targets met for our grants and donations income.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p>	
<p>In addition to the formation of our Business Innovation Directorate, securing long-term grants and donations income from a range of sources, and the greater responsibility given the Heads of Department to meet and grow their contracts and revenue income, SOFEA has a number of internal groups and processes to plan, monitor and evaluate the current and future financial positions of the charity, ensuring long-term financial stability.</p>	
<p>Departmental Budgets: During the final quarter (April to June), all Heads of Department develop a balanced budget, allowing for a percentage of growth. These are reviewed with the Director of Finance to ensure all direct and indirect costs are properly apportioned. The budgets are then discussed with the Business Innovation Team to ensure that any income shortfall (after contract and revenue incomes are</p>	

considered) is clarified and planned into the total fundraising strategy to identify and secure appropriate levels of grant funding to meet the income target.

The collective budgets for all 12 departments, 2 regional offices and core head office functions are amalgamated into a single budget which is agreed by the Board of Trustees.

Business Innovation Team: Researches potential funders based on aligned themes, geographies, funding amounts, uses. We use Monday.com as a CRM system to track our engagements, deadline targets, develop weighted fundraising analyses, and build meaningful and long-term relationships with our funders. Analysing historic and current funding metrics enables us plan increasingly effective tactics to engage new funders with existing and proposed new programmes, and to assess the progress between initial contacts being made and funds being secured.

Weekly cashflow reports: are provided by our Finance Director to the Senior Executive Group (with the CEO, Deputy CEO, Director of Operations and Director of People and Culture). These reports represent a constant review of the detailed financial flows across the charity, including all sources of income as well as planned (and unplanned) expenditure.

Finance and Risk Committee: Established 4 years ago, the Committee is made up of our Chair, Treasurer, 2 Trustees and members of the Senior Executive Group. The Committee meets 4 times a year to provide high level governance and scrutiny, reviewing budgets and income (restricted and unrestricted), agreeing reforecasts if required as well as interrogating the fundraising strategy and current activities. The Committee provides assurance to the full Board of Trustees that the charity remains a going concern.

Fundraising Committee: consists of our Chair and 3 Trustees (all of whom have charity and commercial fundraising and business development experience) and the 3 members of the Business Innovation Directorate. The Trustees provide a sounding board for new fundraising ideas as well as input and advice about ongoing tactical issues. Members are available to review reports and other material as needed.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

SOFEA's income and reserves were not negatively impacted as a result of the Covid 19 pandemic.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Nourish and Flourish Programme has evolved in response to public engagement, complementing existing health services.

Initially, we distributed a questionnaire to over 30,000 patients across the Didcot PCN. Responses highlighted two key issues:

- Poor knowledge and understanding of diet and nutrition
- Lack of cooking skills and facilities to learn.

Two key areas of support were requested:

- One-to-one nutritional support
- Cooking skills sessions.

In parallel, face-to-face discussions with members of the Didcot community larder (170 members at that time) were undertaken whilst delivering cooking demonstrations and sharing recipes with nutritional information. Responses mirrored those of the patient questionnaire.

Over the last year, the Nutritional Therapy Clinic sessions have further identified the lack of cooking skills as a barrier to healthy eating. There is a waiting list of patients for community cooking sessions whilst funding is sought.

The Nourish and Flourish Schools Programme was co-created by Dr XXXX and Dr XXXX, addressing childhood obesity as a major public health concern, with those children being more likely to become adults with cardiovascular disease, type-2 diabetes or various cancers.

The National Measurement Programme highlighted 27% of South Oxfordshire and 32% of Vale of White Horse children of year-6 age are classified as overweight or obese.

The Government's Childhood Obesity – a plan for action² and The National Food Strategy³ aimed to address the issue.

The Schools Programme was therefore developed for year-5 pupils, acting as a preventative measure. XXXX wrote the programme, embedding nutrition into the core curriculum for maths, geography, biology and history and embedded parent engagement sessions, cooking skills support and collated pre- and post-programme data to test the effectiveness of the programme pilot & pilot expansion.

Community Cooking Sessions

The need was identified, from patient questionnaire feedback, larder consultations and the Nutritional Therapy Clinic, that a lack of cooking skills was a barrier to healthy eating.

Securing South and Vale "Food and Warmth" grant funding enabled the roll-out of SOFEA's pilot in 2024, providing feedback from participants about the benefits they gained and the on-going community need.

The 2024 cohort described the benefits they gained: "independence", "learning knife skills", "trying more veg in my meals", "confidence to cook for myself and my son".

1. <https://digital.nhs.uk/data-and-information/publications/statistical/national-child-measurement-programme>
2. <https://www.gov.uk/government/publications/childhood-obesity-a-plan-for-action>
3. <https://www.nationalfoodstrategy.org/>

Didcot Wellbeing Web (DWW)

The DWW was formed under the Didcot Community Partnership, funded by the Didcot Powerhouse Fund (created by the Oxfordshire Community Foundation with money from local businesses).

DWW works with community groups to tackle poverty- and diet-related health risks of high cholesterol, high blood pressure, breathing difficulties, Musculo-skeletal problems leading to chronic ill health including high type-2 diabetes, heart disease and osteoporosis. Similarly, mental health risks of anxiety and depression are often linked to loneliness and social isolation.

In addition to speaking with local residents, the needs are well cited in the following publications:

- Oxfordshire Insights 2021 (OCF)
- Oxfordshire County Council, Joint Strategic Needs Assessment
- Oxfordshire County Council, Corporate Plan 2022-2025
- SODC Corporate Plan

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

As noted above, our clarification of need was confirmed by questionnaires as well as informal and more formal face-to-face discussions with a wider range of individuals and community groups.

As with the majority of SOFEA's beneficiaries, the PCN patients we support, community larder members, pupils and parents of schools, our target groups have a greater likelihood of experiencing a number of health and social barriers including incomplete education, poor qualifications, unemployment, inappropriate housing, poor physical health and mental wellbeing, children on free school meals as well as food poverty and food insecurity.

Our consultations included:

- A questionnaire to over 30,000 patients of the Didcot PCN, confirmed the poor knowledge of diet and nutrition as well as a lack of cooking skills and facilities to learn. The questionnaire also confirmed the wish for one-to-one nutritional support as well as cooking skills sessions. Whilst the PCN owns the data from this questionnaire, Dr XXXX would be happy to provide a summary of the findings if required.
- The feedback from face-to-face discussions with members of the Didcot community larder mirrored those of the patient questionnaire.
- Likewise, patients attending our Nutritional Therapy Clinic sessions at the Didcot PCN also identified

the lack of cooking skills as a barrier to healthy eating.

- Feedback from teachers, pupils and parents of the 8 Didcot primary schools that engaged in the schools programme pilot expansion in 2023 (Manor Primary, Willowcroft Community School, Didcot Primary Academy, Ladygrove Park Primary, Harwell Community Primary, Northbourne Primary, Hagbourne Primary, All Saints Primary) was extraordinarily positive. Indeed, one teacher who moved to Nottingham asked whether she could use the programme at her new school.
- Participants of the Community Cooking Sessions provided enviable feedback from their time learning new skills and recipes.
- SOFEA's Community Engagement Manager is a central figure within the Didcot Wellbeing Web (DWW) and continues to work with The Abingdon Bridge, Be Free Young Carers and Didcot PCN to develop the "NxTgen" programme, identifying late teens / early- to mid-twenties who have little or no knowledge about healthy diets, sourcing food and cooking nutritious meals.
- DWW is also engaging parents and the wider family as an essential step to embedding key positive messages and establishing good practice within the home. A parent pack is being developed to help with choosing and buying healthy and nutritious food.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

SOFEA's EDI Policy is one of the most pertinent policies, guiding the development, delivery and support of every programme, by every member of staff, for all beneficiaries across the regions.

Our Values Statement reads:

"We are committed to supporting people to make a deep connection with themselves and their community. We do this by treating all members of our community with equal compassion and respect and accepting them as they are. As much as we completely accept people as they are, we refuse to accept any limitation on what they might achieve.

"We believe in the restorative benefits of education, work and social justice to support people's innate resilience to achieve growth and their potential as human beings."

"Accepting people as they are, treating them with compassion and respect" embraces the true sense of equality, diversity and inclusion.

We acknowledge the 9 Protected Characteristics as defined by the Equalities Act 2010, as well as a person's socio-economic status, class and background.

For 10 years, we have supported children and young people who have been excluded from school and prevented from engaging with society due to traumatic early years' experiences, a range of neurodiverse conditions, low-level mental health issues including anxiety and depression, negative experiences and poor achievements at school.

Around 20% of our young people have experienced the care system or are carers themselves. Similarly, many have also had repeated contacts with social services or the youth justice system – strong predictors of becoming long-term NEET.

The development of our FareShare food operations, Community Larder network and social prescribing link workers continues to support individuals and families who are often marginalised due to poverty, homelessness, poor qualifications, unemployment, loneliness and isolation, poor physical health and mental wellbeing. These individuals frequently experience statutory services being "done at" them, rather than "done with" them.

SOFEA's services are truly holistic, offered with empathy and provided in partnership with the individual. We are often described as "walking alongside" our young people, social prescribing patients, community larder members and others who receive our support.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Given that SOFEA supports vulnerable and disadvantaged individual, families and whole communities, these groups are included in all KPIs for our programmes:

- The Schools Programme will have been successfully delivered to 720 year-5 pupils. Through their in-class activities, they will demonstrate improved knowledge of diet and nutrition. They will also be more interested in helping to cook healthy meals at home.

Over a longer period of time, it would be anticipated that the proportion of children in these schools who are overweight or obese will reduce:

- the number of patients being referred to Nutritional Therapy will increase, based on the greater awareness of the social prescribing and improved referrals through the GPs.

These patients will improve their knowledge of nutrition and appreciate the impact of healthy diets on their long-term health and wellbeing.

Over the long-term, it would be anticipated that the proportion of patients who are pre-diabetic, overweight or obese will reduce.

- The Nourish and Flourish kitchen, led and mentored by XXXX, will see more learners and trainees engaged with the practical and functional aspects of the kitchen, learning new and employable skills as well as developing a greater interest in healthy and nutritious foods.

We anticipate around 20 young people moving into the catering and hospitality sector through work experience, apprenticeships and full employment.

- The number of participants engaging in the Community Cooking sessions, will increase due to referrals among friends and family, as well as through referrals through community groups.

As with the other initiatives, we anticipate greater awareness of nutrition and eating of healthy diets for themselves and their families leading to a reduction of health risks and overall improved wellbeing.

- The new Nutritional Therapy Cooking Programme will have engaged 20 patients referred through SOFEA's Nutritional Therapist. By following the advice and guidance of XXXX and XXXX, as well as sourcing nutritious food through their local Community Larder, each patient will have reduced their health risks (reducing weight and improving biomarkers).

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

902

Please explain how you have determined the number of beneficiaries.

- 455 year-5 pupils have been engaged over 2 years with the Nourish and Flourish Schools Programme in Didcot. The 7 local Primary schools have an average of 50 pupils per year group, equating to 350 year-5 pupils in at the 7 Primary schools.
- The number of patients referred to SOFEA's Nutritional Therapist through the Didcot PCN is 214 in the last 12 months. Patient referrals are logged on the GP practice systems and matched by the Nutritional Therapy attendances.
- SOFEA has 61 learners aged 16-18, as well as 18 learners aged 14-15. We also have 74 trainees participating in our internal employability skills training programme. These 153 learners and trainees have the opportunity to engage in the kitchen activities.
- The Community Cooking programme delivers 12 modules per year for 5 participants per module. The 60 participants join XXXX and XXXX at the Nourish and Flourish kitchen, learning, preparing, cooking and eating together.
- With the newest initiative ready to start, the Nutritional Therapy Cooking Programme is directly linked to the one-to-one Nutritional Therapy clinics provided at the Didcot PCN. Allowing for the existing capacity of XXXX and XXXX, we plan to support 20 patients in the first year, with personalised programmes to suit specific mental health issues (neurodiversity, disordered eating, anxiety, depression) as well as diagnosed physical conditions (type-2 diabetes, heart disease, osteoporosis).

Please describe who will directly benefit from your services/activities.

Young people are referred to SOFEA by schools and colleges, pupil referral units, social services, Child and Adolescent Mental Health Services (CAMHS), the police as well as Voluntary Community Sector (VCS) partners and parents. Many are at risk of becoming long-term NEET (Not in Education Employment or Training), leading to a life of worse job prospects, low earning potential, risk of substance abuse and criminality as well as poor health and mental wellbeing.

Over 30% of our learners and trainees come from homes in which the “toxic trio” of parental mental health, substance abuse and domestic violence are prevalent. Due to these environments, many youngsters have also suffered adverse childhood experiences (ACEs) resulting in long-term emotional and behavioural issues and a wide range of diagnosed mental health conditions.

With additional support needs associated with neurodivergent conditions as well as trauma-informed coaching and mentoring to address the impacts of chaotic and disruptive family lives, SOFEA has proven highly effective at engaging young people, building their self-esteem and confidence, praising their achievements and helping them to gain qualifications, work experience, apprenticeships and employment. These young people are far less likely to require future statutory interventions including health and social services, police and the justice system.

Having increased membership of our community larders by 22% over the last 12 months, we know that the post-Covid issues facing communities continue to be felt alongside the growing cost-of-living crisis and ongoing concerns about Universal Credit.

With food poverty linked to other financial and social disadvantages, it is vital that SOFEA continues to shine a light on the myriad social issues causing entrenched, multi-generational disadvantage and inequality that lead vulnerable people to experience financial hardship – many for the first time. These priority issues are noted in Oxfordshire’s Joint Strategic Needs Assessment (JSNA) and the Joint Health and Wellbeing Strategies.

Whilst the compound effects of multiple deprivation on children and older people is particularly concerning, we also target these specific groups which are, by definition, the most vulnerable.

In the absence of children’s centres and convenient community spaces, each Community Larder also provides a venue for activities such as stay-and-play, social prescribing and informal counselling, training and education including digital inclusion initiatives and subscriptions to social tariffs for utilities. These additional services help to remove the stigma of food poverty whilst creating strong bonds between parents, children, Larder Partners and SOFEA’s support team. The overall benefit of providing these collective services is to improve the general health and wellbeing of members, families and whole communities.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Considering the theme of Thriving and Healthy Communities, SOFEA’s Nourish and Flourish programme brings core elements of health and wellbeing to identified groups of vulnerable and disadvantaged children, young people, adults and community groups.

Through our partnerships with Didcot primary schools, the Didcot PCN, the Didcot Wellbeing Web (including Abingdon Bridge and Be Free Young Carers), health and social care, schools and colleges, the individual programmes within the broad Nourish and Flourish initiative have been developed by Dr XXXX, XXXX and Dr XXXX to address specific health and wellbeing issues as preventative or early interventions for specific cohorts.

The long-term benefits of the Schools Programme will see fewer children and young people experiencing poor health and wellbeing as they and their families adopt healthy diets and lifestyles, progressing through adolescence into adulthood. In turn, the demands for health care linked to diet- and lifestyle-related illness and chronic conditions will reduce.

Similarly, with local groups engaged in the Community Cooking programme, social connections will be made and cemented, reducing levels of depression and anxiety often associated with isolation and loneliness linked to poverty, unemployment, neurodiversity and other limiting situations.

By improving the social connections, physical health and mental wellbeing of targeted vulnerable and disadvantaged individuals and groups, the Nourish and Flourish programme will contribute to reduced demands on health and social services as well as the benefits system as a result of people gaining work as a result of the training and mentoring of SOFEA and, specifically, the Nourish and Flourish kitchen.

In particular, the Nutritional Therapy Cooking Programme aims to improve patients' overall confidence, health and wellbeing resulting in a lower likelihood of demands for specialist services including complex weight management and surgical treatments, as well as long-term mental health support.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Through the supported funding of Dr XXXX and XXXX, the Nourish and Flourish programme will continue to develop resources for schools, modules for community cooking and capacity for the Nutritional Therapy cooking programmes.

The overall outcomes and benefits associated with the Schools Programme, the Nourish and Flourish kitchen, the Community Cooking programme, one-to-one Nutritional Therapy and the Nutritional Therapy Cooking Programme are:

- improved knowledge of nutrition and healthy diets
- increased cooking of healthy meals for the individual and their family
- reduced consumption of processed and ready-prepared foods that are high in fat, sugar and salt.
- reduced weight
- improved biomarkers (blood pressure, heart rate, lung capacity)
- reduced joint pain and musculo-skeletal complaints
- reduced reported rate of isolation and loneliness
- improved social connections
- improved mental health and wellbeing (including less disordered eating, anxiety and depression)
- reduced risks of long-term chronic ill health (type-2 diabetes, heart disease, osteoporosis)
- improved qualifications
- greater number of people gaining work experience, apprenticeships and employment.

All of these outcomes and benefits promise to reduce the associate public sector costs of health and social care providers.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

The Nourish and Flourish programme has evolved through liaison with local residents, local schools and working in partnership and collaboration with key networks (most notably the Didcot Primary Care Network) and organisations to identify local needs and develop free nutritional support within the community.

SOFEA's Nourish and Flourish Programme Manager sits on the Food Sustainability and Health Group along with Oxfordshire County Council Public Health and key organisation representatives within the health sector. The Programme Manager is also a member of the South and Vale Food Strategy Action Working Group. Both groups have provided an opportunity to ensure the development of Nourish and Flourish is aligned with key local strategies and need.

In summer 2023, the Programme Manager formed a community cooking coalition with partners across the South and Vale districts and led on the application for funding from the Food and Warmth grant to pilot community cooking sessions. Having secured this funding, the Nourish and Flourish community cooking pilot ran from February to March 2024.

The key delivery partners included Maymessy, Style Acre, Down to Earth and One Planet Abingdon with collaborative input from Sustainable Wantage.

Secret Santa 365 is a collaborative partner of Nourish and Flourish, providing cooking equipment when that is identified as a barrier to healthy eating. They also supported the Community Cooking Project by providing additional utensils for participants, in addition to the free slow cooker that participants were gifted under the Food and Warmth grant.

The Nourish and Flourish School Programme was developed in partnership with the participating schools during the 2022 Didcot pilot and the 2023 pilot expansion. With key delivery contributions from Replenish (an OCC-funded project within the fold of CAG Oxfordshire) and You Move South and Vale Officers.

The Nourish and Flourish Kitchen build required vital partnerships with corporates. The kitchen design was

undertaken, pro bono, by Object Space Place who continue to support Nourish and Flourish. Key funders included Magnox and Sainbury's, FareShare UK as well as local authority funding from South Oxfordshire District Council. Most of the kitchen's metal furniture came from the John Radcliffe hospital through Bouygues, whilst the crockery came through links with JSK Restaurants and the Winterhalter dishwasher through partnerships via our employability programme. Topps Tiles provided free tiles; VVP Removals provided a significant discount when removing the equipment from the hospital, as did Howdens with the cabinets.

In partnership with the Didcot Wellbeing Web, Nourish and Flourish piloted a pop-up cooking and activities day in partnership with TRAIN for young people identified locally within families of extreme deprivation. The anticipation and hope is for that trial to be expanded and for a wider roll-out of such opportunities to be nurtured.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

A key element of the Nourish and Flourish strategy is to develop a social enterprise to help generate revenue which could support key elements of the Nourish and Flourish Programme.

The aspiration is to utilise SOFEA's young people and community members on SOFEA and partners employability programmes to mobilise the operation on a day-to-day basis. The early concept includes generating healthy meals in the Nourish and Flourish kitchen which could be sold at cost price, from site, to local community groups and businesses, providing a cost-effective and healthier option to local take aways. From discussions with participants on the community cooking sessions (particularly those who have experienced homelessness) we know that, had such an alternative been available to them, they would have utilised the opportunity.

A full scoping study needs to be undertaken. However, with the potential addition of an electric food/barista van, the operation could attend local events and reach into areas of deprivation, including identified "food deserts" where locally sold food is too expensive and lacks choice. This would help local resident to reduce their dependence on take away meals or more processed options in the shops.

We are currently working with the Social Enterprise Officer at Sovereign Network Group (housing association) for support and have also spoken with social research specialists at Oxford Brookes University to help develop the groundwork for the proposed venture over the next year.

We are also utilising the Nourish and Flourish kitchen to host dinners for major donors, commissioners, companies, volunteers and other guests who have expressed interest in SOFEA's programmes and future plans. Such events help to nurture and develop important relationships and expand our collective thoughts about the development of our wonderful kitchen facility and the wider Nourish and Flourish programme.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Positive environmental impacts

Research suggests that 1 tonne of rotting food produces 90 cubic meters of biogas (methane and carbon dioxide), the equivalent of 540 kWh of heat energy.

Based on these calculations, SOFEA's redistribution of 1,667 tonnes of food saves 150,030 cubic meters of biogas (equivalent to 900,180 kWh of heat energy) from being released into the atmosphere.

<p>River Thame Conservation Trust</p>	<p>Ref: SRev25-27/58</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. No shortfall. Note that the Community current project for 24/25 comprises the £7.2K we are in receipt of from SODC's revenue Grant, plus £15K from Thames Water's Catchment Partnership Community currents fund. We anticipate receiving comparable funding from Thames Water in the following two financial years to compliment the SODC funding we are pursuing here. In the event that TW funding was not forthcoming, the SODC funds would nonetheless still enable us to deliver a highly effective project, albeit on a slightly scaled back basis (in reality though, if unsuccessful with TW we would pursue other funding to compliment SODC funding to enable us to maintain the scale and ambition of the programme).</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. In September 2022 the Trust employed a new CEO who had a background in business development within environmental organisations. This appointment enhanced the Trust's ability to identify, pursue and secure income from a diverse range of sources. This is an ongoing process, but has contributed towards the trust securing more income from trusts and foundations - e.g. an award from the John Lewis Foundation, a three year award from the Rothschild Foundation, and a 2yr+ Landscape Recovery award from Defra. We continue to secure funding from the Environment Agency, based on its confidence in our ability to deliver.</p> <p>The Defra Landscape Recovery project in particular represents a marked change for the Trust in that this is a high-profile and prestige project which is multi-partner and multi-stakeholder in nature. This has elevated our profile and credibility significantly, and is resulting in more approaches from external partners to work with us. Notably, the 2-year "Project Development Phase" is targeted at generating investment from private sources which will support the project for a further 20 years (Defra will likely also provide a degree of support over this period). The project is thus placing RTCT at the forefront of developing new private markets for ecosystem services - which represents an additional future dimension of our income diversity.</p> <p>Project and Financial management - From 2023, the Trust employed for the first time its own in-house Financial Controller. This role has embedded valuable systems and processes to enable improved project and organisational financial analysis, reporting and control, greatly improving the efficiency and resilience of the Trust. These processes are now working well and greatly improving the financial stability and resilience of the Trust and our ability to effectively forward plan staff resource needs.</p> <p>Currently the Trust receives little in the way of direct public donations. We plan to change this situation through embarking upon a programme of crowdfunding initially through pursuit of the Big Give's Green Give Campaign (preparations in place for an application in Nov 2024 and campaign in April 2025). We anticipate that this will be the start of a continuous annual public donation programme, which will provide much needed core funding to the Trust.</p> <p>Lastly, the Trust is embarking on new opportunities presented by Biodiversity Net Gain requirements. We played a key role in one of the first national habitat Banks -Lopemedede, in Buckinghamshire, where we provided ecological management advice, partnering with Bucks Council and the Trust for Oxfordshire's Environment (TOE). The partnerships formed as part of that project have provided the basis for ongoing exploration of how we and TOE can further collaborate, capitalising on TOE's leading role in delivering BNG for Oxfordshire's local authorities, and RTCT's ecological expertise.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. RTCT policy is that the Trust should hold at least 6 months of full operating costs as reserves. This is managed in accordance with the proceduses under the "Banking and Investments" section of the attached RTCT Accounting Procedures Sept 23 Document.</p> <p>As a trust, reserves / working capital have not been an acute issue as we have relatively healthy reserves, which significantly exceed the 6 month policy. Some of these reserves are held in charity-appropriate</p>	

investment funds which allow access to funds at relatively short notice, thus ensuring liquidity in the event of an unforeseen cash flow issues. The remainder of our reserves are held in our deposit account and serve as working capital, which is essential given that many of our projects require initial outlay of costs, e.g. to contractors, which are then recovered retrospectively from funders at project completion.

Reserves, liquidity and cashflow are monitored, managed and forecast on a continuous basis by our Financial Controller. Key points are then fed to the Trust Finance Committee as and when needed, and formally at quarterly Finance Committee meetings (which in-turn reports to quarterly RTCT Board meetings). Note, our relatively healthy reserves arose due to a one-off significant award in 2014 rather than annual accumulation of surplus over time.

Our financial performance in FY 23/24 is worthy of commentary here. That year co-incided with increased ambition (increased staff and operating costs, e.g. associated with moving to a new larger office base), but had a lag in income to match reflect those increased costs. That income has now materialised, through a focused programme of income pursuit and diversification. The outcome is that the Trust has, for the first time a number of high-profile multi-annual projects, providing a degree of longer-term financial security hitherto absent. Additionally the Trust anticipates delivering a close to break-even outturn for 24/25 in contrast to the deficit recorded in 23/24.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Freshwater quality is amongst the highest of environmental concern for the public. This was made clear as a local (Oxfordshire) level through the Local Nature Recovery Strategy Process whereby Health of Freshwaters was cited (based on stakeholder survey) as the highest environmental priority for the LNRS: "Improving water quality and improving the health of rivers and freshwater habitats emerged as most people's top priority from earlier workshops and surveys which were held in 2024 to inform the draft LNRS". (see page 52 of the attached LNRS document).

From our work as catchment co-hosts for the Thame Catchment Partnership we similarly know from stakeholders that water quality and river health is a significant priority - again, as evidenced from survey of stakeholders attending catchment Partnership meetings, and our annual Thame catchment Partnership water Conference widely attended by community groups (again, ascertained through live polling during the event). RTCT has attended and presented at community instigated events to discuss water quality such as that instigated by the Thame Fishery Consultative in Thame (Spring 2024). Such was the public interest in the event that attendees (well in excess of 100) exceeded the capacity of the venue. Attendees included a wide range of members of the public, local government representatives, and prospective parliamentary candidates for the Thame and Henley constituency.

During the meeting we were able to understand further the extent to which attendees cared about the health of the Thame and its tributaries, and were concerned about the effects of pollution. Our project provides concerned people with an opportunity to proactively engage with the issues, providing them with agency, as well as enhanced knowledge and skills around the issues, such that they can advocate better for the issues. Our role as facilitators of the Thame Catchment Farmer Cluster enabled us to hear from farmers as to how sewage spills allied with extensive flooding were resulting in deposition of raw sewage on the land. We issued questionnaires to farmers to better evidence the extent of the issues such that this, and have been able to make representations to Thames Water, the Environment Agency and Natural England regarding the issue. As well as listening to community needs and responding accordingly through the above forums, the Community Currents project has itself an inbuilt engagement element, which involves regular open meetings with current and prospective citizen scientists and other interested parties. These provide a basis for two-way knowledge exchange, which allow us as a trust to be flexible to community needs, and adapt as appropriate.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Please see response to "community need" which highlights how we have consulted with individuals and groups to understand the concerns around river health.

An example of how we have adapted in response to public opinion came from audience feedback at the

Thame Public event (see above response) which, in essence was that people had a strong sense from the trust that we were undertaking a great deal of monitoring, but participants had less of a sense of the actions we were taking. On the basis of this, we incorporated the following within the project: i) Community workshops which entailed a stronger emphasis on actions to address water quality ii) Greater emphasis on explaining the technical complexity and financial challenges of the problem (infrastructure "catch-up" will take billions, and decades), and better communications of the action we are taking (e.g. enabling the Environment Agency to better locate its statutory water quality monitoring programmes).

An additional purpose of our project is education. Evidence of consulting on the need for this is provided from feedback of Thame 2003 Water Conference attendees. despite this group having high concerns and interest in river health issues, understanding of how wastewater treatment operates, was poor (see attached slido poll result). Additionally, when polling conference attendees on the presentations they found most useful presenting on "how does a sewage treatment Works operate", was strongly valued (see attached graph of slido results).

The question of vulnerable and priority groups is an important one to the Trust. We are aware that engagement with environmental and water quality issues is skewed towards particular demographics and socio-economic groups. We need therefore to Thus, as a trust, notwithstanding needs to improve governance of Water companies (investment in infrastructure vs investor rewards), society probably needs to pay more for its water. Many of our participants would support this view, and would be able to pay. However, such a stance by the trust would neglect those less able to pay. The trust therefore supports the adoption of innovative charging models such as the rising block model, whereby high volume users (typically those with greatest ability to pay), pay disproportionately higher (for consumption over and above more typical consumption levels. Note, such a model would also include safeguards for low income users who have particular needs for higher water consumption.

The trust is also seeking to increase involvement of a wider demographic and social Groups in the Project. We have recently commenced a programme of work with schools, and are seeking to establish a nature and cities project targeted. Our plan is to use these projects to channel interest and participation towards the Community Currents water quality project.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

The trust has a strong ethos and culture of operating according to EDI principles and meeting the needs of vulnerable and priority groups. Trust staff members have variously been trained in / have experience of recognising and accounting for Unconscious Bias, safeguarding, neurodiversity, protected characteristics in the workplace. Trust Staff have extensive experience of recruiting in accordance with EDI and have most recently employed these as part of our 2024 recruitment of two new staff members. Most recently we have successfully undertaken a project "Salmon in Schools" with an SEND specialist school - which we hope to continue.

The trust also considers EDI in terms of its volunteer participation. We do this through asking volunteers to identify any relevant characteristics / conditions and requirements as part of the sign up process (collated and held securely in accordance with GDPR requirements on our Better Impact System). This in turn allows RTCT staff overseeing e.g. volunteer work parties to cater for those individuals according to their individual needs. Improving water quality and improving the health of rivers and freshwater habitats emerged as most people's top priority from earlier workshops and surveys which were held in 2024 to inform the draft LNRS.

Additionally, we remind volunteers when signing up, and as part of on-site briefings, that the EDI principles apply to the volunteer work party in the same way they would in the workplace. i.e. volunteers themselves need to ensure conduct and discourse does not contravene EDI requirements and principles.

RTCT has extended the principles of our own organisation to the Thame Catchment Partnership through creation and establishment of an agreed Equality, Diversity and Inclusion Statement (attached), ensuring that those principles and practices are integral to the Catchment Partnership and its activities.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We will establish measures of success for the project. These will be based both on participant experience, but also of attainment of environmental outcomes - success of practical measures, success of advocacy and publicity pursued as part of the project,

We will quantitatively collect data from participants as to their experience, and qualitatively and quantitatively

assess attainment of practical actions and advocacy measures. We will undertake these throughout the project rather than solely at its completion, such that we can learn lessons and where appropriate modify the programme.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

6,000

Please explain how you have determined the number of beneficiaries.

Approximately 120 citizen scientists will directly benefit from the project. The material and information which they will convey to the wider communities can be estimated to be of positive benefit to at least 50 people per citizen scientist, reaching up to an estimated total of 6000 people. This is only the knowledge share information, which will lead to health and wellbeing benefits relating to knowledge of detrimental water quality and sources of pollution in the catchment, and identification of cleaner green and blue spaces for local residents to enjoy.

Once pollution sources are identified and those responsible are engaged to improve water quality across the catchment, this will bring benefits to the entire River Thames catchment, with a population of approximately 183, 000, an estimated 40-50 % of whom live within the South Oxfordshire district.

Please describe who will directly benefit from your services/activities.

- Direct participants in the project.
- Wider residents in the catchment & the SODC portion of the Catchment.
- Farmers experiencing contaminated floodwater (a significant issue in 2023/24).
- Thames Water (in terms of reduced pollution loading from non-TW wastewater sources, and reduced requirement to remove contaminants).
- Tourism sector - from reduced adverse aesthetic impacts and odour of sewage spills and poor water quality.
- Participants in swimming and other surface water contact sports in the Thames and Thames downstream of its confluence (see British Rowing info) - increased amenity, and reduced illness associated with poor water quality.
- Anglers - improved health of fish populations. increased amenity, and reduced illness associated with poor water quality.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The council has important biodiversity duty, and a key role to play in nature recovery - Considering that Water Quality and freshwater Health are the Number one priority in the Local Nature Recovery strategy, the Community currents project represents a direct and tangible response to its general statutory biodiversity duty, the Local Nature recovery strategy, and Public concern in respect of river health.

The significance of the project is also in terms of health benefits - both directly through the mental and physical wellbeing benefits of participants engaging in nature, but also in terms of better understanding and addressing the public health disbenefits arising through river and (via flooding) land pollution.

Improved homeowner behaviour in relation to domestic water use (e.g. avoiding incorrect disposal of materials down the drain), and better management of gardens, driveways to reduce runoff, as well as reducing the number of wastewater / clean water "misconnections), will reduce problems to infrastructure in towns, and rural areas, all of which can create problems for local authority assets, operations, and public perception of local authorities (irrespective of who is actually responsible!).

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Action on climate change and nature recovery

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Despite the high levels of concern and even "eco-anxiety" arising through environmental challenges, most notably river health, currently the extent of tangible action to resolve the challenges are dwarfed by media rhetoric, and often poorly informed public discourse over what is actually a complex subject matter. Yes, many of the challenges arise from the water industry and the manner by which it is regulated. However,

meaningful improvement in infrastructure will be a multi-decadal challenge. What is less appreciated is that there are activities within the gift of individuals and communities which can make a material difference, and it is those activities that the Community Currents project seeks to promote (as well as generating informed advocates able to champion the cause of rivers, and hold polluters to account).

They include: Identifying river health issues that are of a nature, or occur intermittently such that regulatory regimes cannot adequately identify them, personal water conservation and re-use e.g. measures which reduce rainfall runoff to combined sewers - the main contributor to spillage of raw sewage in urban environments and to rivers these include Water Butts, avoiding impervious surfaces in gardens, identifying mis-connections. As well as empowering and equipping participants to attain these objectives, the wider benefit is in enhanced physical and mental wellbeing from actually undertaking structured regular sampling visits, reduced eco-anxiety through having a sense of agency, and ultimately progressing the exact reason people want to get involved - improved water quality and the wildlife supported by it. Additionally, the "green skills" gained by participants are likely to have benefits in terms of equipping individuals to pursue paid or voluntary roles within the thriving sustainability sector.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Our project directly addresses the issue of river health, which was identified during the LNRS development phase by workshop participants, as the the single biggest issue of concern. RTCT is actively engaged with the Oxfordshire LRNS, and that of Buckinghamshire - indeed, we see ourselves as having a pivotal role in reconciling the needs of rivers in terms of the Catchment Based approach, with both LNRSs (including through the Thame Catchment Partnership, which brings Oxon and Bucks LNRS representatives together).

Our Community Currents Project works with a number of local community groups e.g. Watlington Environment Group, Sustainable Wheatley, Cuttle Brook volunteers- capitalising on the pre-existing momentum and local knowledge that these groups have, and further building capacity within them.

In the current financial Year, we secured a degree of funding for the project from Thames Water, from its Catchment Partnerships competitive Fund. The funding was accepted by RTCT on the basis that we will deliver the outcomes without fear or favour (this was essential given TW's significant operational impacts on Water Quality in the Thame, and their critical role in improving the current situation).

The project is integrated with wider stakeholders (including local authorities, English Nature, Environment Agency and Thames Water) through the Thame Catchment Partnership (which we have utilised for specific Water quality workshops), the Thame Liaison Group, and the Thame Catchment Farmer Cluster, for whom we have undertaken water quality workshops, and have instigated a study to understand the impacts of sewage contaminated floodwater on farmland (in respect of food production, aesthetics and amenity and environmental quality (grassland species diversity).

Lastly, we are collaborating with a private company to explore development of a portal through which our water quality results, allied with those made publicly available by others (e.g. Environment Agency and Thames Water sewage spill data), with outputs tailored towards different groups, based on their different interests: environmental professionals, anglers, open water swimmers and recreational walkers.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

RTCT has positioned itself to be a leading contender for Thames Water's Smarter Water Catchment (SWC) initiative, which it intends to roll-out once its final determination is concluded (Dec 24). If OFWAT's determination does fund the SWC initiative , additional funding may be forthcoming from 25/26.

RTCT is collaborating with other Rivers Trusts in the Thames Catchment under the auspices of the National Rivers Trust to identify regional opportunities to undertake water quality and related projects. This collective approach enables us to access regional and national funds which would not be available to a local trust such as ours. The national Rivers Trust has for example been successful in securing large national projects for example from the OFWAT Innovation Fund. The credibility RTCT has established with the national Rivers Trust to date through our water quality work places us strongly to be included in national RT led bids.

Our collaboration with a private company to develop improved and more accessible water quality data may result in further opportunities with that organisation. For example, based on our partnership, we submitted a proposal (unfortunately unsuccessful) to a recent Innovate UK call.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Our organisational purpose is to deliver nature recovery encompassing climate change mitigation and adaptation.

Over the 12 years of RTCT's existence we have delivered extensively across the Thame Catchment to attain nature recovery and net zero within the land-use sector. Our work has included: Creation of new wetland habitats, as in the case of Eythrope wetlands, and Manor Farm, which on the basis of being regarded by the Environment Agency as an exemplar of partnership working, was visited in 2023, along with RTCT staff, by Environment Minister Rebecca Pow, Restoration, of river habitat and creation of new river habitat such as the new channel created on the Chalgrove Brook near stadhampton, which is now a thriving biodiverse reach of chalkstream habitat, which also enables fish passage at a previously impassable barriers, working with farmers to promote water and wildlife firendly practices through our Engaging with Farmers Project and

However, we note that our operations themselves have potential to impact upon the environment. We therefore ensure that on a day to day basis, all our activities are conscious of their environmental implications, e.g. planning fieldwork to ensure milage is minimised (e.g. visiting multiple sites in one round trip rather than making multiple trips), using public transport wherever possible. Creating a workplace culture which views cycle commuting to work positively (some of our team are regular cycle commuters). We also think through our purchasing requirements carefully, being mindful of driving sustainability through our supply chains. At RTCT events, we have frequently commissioned for catering the community interest company "Waste to Taste" who use food which would otherwise be discarded to produce fantastic fayre - thus avoiding food waste and the negative environmental consequences of that waste. Further to that food theme, we are active participants in the Buckinghamshire food systems group facilitated by the Rothschild Foundation which is trying to address sustainability issues in the food system locally.

Be Free Young Carers

Ref: SRev25-27/50

Financial Review

Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.

Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.

If there is a shortfall in funding for the services and activities described in our application, we will implement a proactive and flexible approach to ensure all costs are covered without compromising the quality of our services. Our strategy would include:

Prioritisation and Cost Management:

- We will review our planned activities and identify essential services to ensure that critical programs continue uninterrupted. Non-essential or lower-priority activities may be postponed or scaled back temporarily to allocate resources effectively.
- We will also look for ways to reduce costs by negotiating with suppliers, leveraging in-kind donations, and increasing the use of volunteers to support core activities.

Emergency Fundraising Efforts:

- In the event of a funding gap, we will launch targeted community fundraising campaigns, highlighting the urgency of the situation to mobilize support from local donors and supporters. We will also increase efforts to engage existing and potential corporate partners to secure additional sponsorship or donations.
- We will use digital platforms and social media to quickly reach a broader audience with fundraising appeals, enabling us to raise smaller contributions from a larger pool of supporters.

Utilising Reserves or Contingency Plans:

- If we have built up any financial reserves or emergency funds, we will tap into these resources to cover immediate shortfalls, ensuring service continuity. We will ensure that any funds used are carefully managed to avoid over-reliance and maintain the charity's financial health.

Exploring Alternative Funding Sources:

- We will explore new grant and trust opportunities, particularly those that offer quick turnaround times or emergency funding. In addition, we would consider applying for loans or credit from ethical sources, should that be a viable option for short-term financial coverage.

Collaborative Partnerships:

- We will reach out to other local charities or community groups for potential collaborations, which could result in shared resources, reduced costs, or joint funding applications, helping both organizations to continue delivering essential services without incurring the full cost burden alone.

Through careful financial management, emergency fundraising, and a commitment to seeking collaborative solutions, we will work diligently to address any shortfalls and ensure our services can continue to meet the needs of our beneficiaries.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

- To improve the financial stability of our independent charity over the grant period and in the future, we will focus on diversifying income streams, strengthening partnerships, and enhancing financial management. Our approach will include:

Diversifying Funding Sources:

- We will actively seek a balance between trust and grant funding, community fundraising, and corporate partnerships. By targeting different sources, we can reduce reliance on any single funding stream and build resilience against potential shortfalls. We will also develop a strong pipeline of grant applications by identifying new funding opportunities and ensuring timely and high-quality submissions.

Strengthening Corporate and Community Engagement:

- We will expand our corporate relationships by building long-term partnerships, offering clear and tailored value to businesses, such as visibility for their contributions, volunteering opportunities, and CSR alignment.
- In the community, we will increase our efforts in fundraising events and campaigns to tap into grassroots support. We will also encourage regular giving programs and explore digital fundraising methods to engage a wider audience.

Maximising Efficiency and Financial Planning:

- By maintaining tight control of costs and reviewing our expenditures regularly, we will ensure our funds are being used effectively and strategically. We will also improve our financial forecasting and scenario planning to anticipate changes in income and adjust accordingly.
- We will also invest in capacity-building activities to enhance our team’s fundraising and financial management skills.

Building a Strong Supporter Base:

- Engaging donors, beneficiaries, and supporters through regular communications about our impact will foster loyalty and increase repeat donations, creating a more predictable income stream. This multi-pronged approach will enable us to build financial resilience, ensuring the charity’s long-term sustainability while continuing to deliver impactful services.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

2023/2024 Accounts yet to be audited

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

As a charity, we currently support over 650 active young carers who are in need of support. Statistics from Oxfordshire County Council estimate there are around 12,000 young carers in Oxfordshire, with findings from The Carers Trust suggesting it could be as high as three young carers in every classroom across the UK. However, according to the 2024 school census, 72% of schools did not register any young carers. This suggests that many young carers are going unidentified and, therefore, unsupported. In South Oxfordshire alone, we currently have 218 young carers registered with us. Given the estimated number of young carers in Oxfordshire, it is likely that approximately 2,782 young carers in South Oxfordshire could still need our support.

According to the website Snobe, there are 89 schools in South Oxfordshire. To ensure that all young carers in South Oxfordshire receive support, it is essential for us to engage with these schools, either to directly support a young carer or to assist schools in developing support systems. A significant number of our referrals come directly from schools, making strong relationships with them a priority for us. In addition, we receive referrals directly from parents and doctors, although schools remain the primary means of identifying needs in some areas. We have a list of enquires that occur outside of our current geographical areas so that we are able to follow these up or sign post when opportunities present themselves.

We also work closely with local town councils and apply for grants through these channels. Funding from these sources is essential, as it allows us to attend council meetings and raise awareness among councillors about the need to identify young carers in the local area. This funding then enables us to spread awareness further, helping more young carers to be identified and supported.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Many young carers have caring responsibilities for parents who may belong to priority groups, such as those with disabilities. To ensure that young carers face no barriers in accessing our services, our youth workers conduct home visits. This enables them to interact with the family and speak directly with the young carer to

assess the level of support required.

To provide services that are relevant to the needs of young carers and their families, we gather regular feedback from a variety of sources. We employ several data collection methods, including an annual online form for feedback from parents. This allows us to understand if there are services parents feel we should improve. Additionally, we ask our young carers for feedback on our trips, enabling us to respond to their preferences. During our emotional support sessions, counselling, and mindfulness movement sessions, we use a wellbeing scale. Previously, we used the Warwick-Edinburgh scale but are transitioning to the Stirling Wellbeing Scale, which is designed specifically for young people. These scales help us track how a young carer's wellbeing has been influenced by our support, allowing us to identify if additional support is needed.

Moreover, we are actively involved in driving change within the wider community. We attend boards and meetings regularly to raise awareness of the community's needs and to identify new opportunities. As a member of the Carers Trust, we gain access to statistics and information about young carers, which we use to shape and refine our services. We also hold youth panels with our young carers, providing them with a platform to express the changes they want to see for young carers, both within Be Free Young Carers and more broadly.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Equality and diversity are at the heart of the charity, implemented in interactions with families, young carers, other professionals, and within our team. As a team, we all read the equality and diversity policy upon joining the organisation. This knowledge and understanding are developed further through training and team meetings. We frequently undertake training to ensure we remain up to date with information on equality and diversity. This training may come from internal resources that we have provided or researched, but it also includes external training to ensure we hear first-hand experiences of having a protected characteristic.

As a charity we support a range of diverse needs and practices are in place in order to reflect the needs of individuals such as for those with disabilities or caring responsibilities.

The team's learning is carried forward into our daily practice to ensure we can effectively meet the needs of young carers and their families. It is important that we empower young carers to develop their own understanding of equality and diversity. This is achieved by providing age-appropriate support and resources for young carers to use and by creating a safe space in sessions, such as our 13+ youth clubs or one-to-one emotional support, to foster these conversations.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

As a charity, we have key outcomes that we are working towards, including: empowering young carers to reach their full potential, enhancing emotional and social well-being, and measuring impact to improve effectiveness. To reflect on whether we are meeting these outcomes, we use our impact collection. We have key impact-measuring processes that we follow, one of which is our story log. The story log is completed by team members to document stories, quotes, and feedback from their interactions. Often, this includes quotes from young carers and their parents; however, it can also serve as a place to document small case studies or record reflections on particular interactions. This allows us to gather an authentic representation of the day-to-day impact we have on young carers and their families.

We also gather annual feedback from parents, enabling us to assess the charity's impact on their families while collecting information on how we can improve our services and what families would like to see in the future. Additionally, our young carers complete feedback after participating in any of our respite activities, allowing us to gather insights on the benefits of the activity and their preferences for future events.

An important part of our impact measurement is the use of well-being scales with young carers after they engage in a well-being activity, such as one-to-one emotional support, mindfulness movements, or counselling. These scales allow us to measure well-being at the beginning and end of the programme to confirm that there has been a positive impact on the young carer. Through these processes, we can identify areas where we have specifically helped and supported young carers and their families, enabling us to tailor our services to meet the needs of the young carers effectively.

Another way we assess our impact is by monitoring the number of young carers we are registering and supporting. This helps us to ensure that our services are reaching young carers in need. To be proactive in our support approach, we collaborate with schools to raise awareness of the challenges young carers face and guide them on offering support within school settings, thereby providing an additional level of support.

<p>Direct community benefit and inclusion</p> <p>How many people will benefit from the services/activities provided by this funding on average each year? 654</p>
<p>Please explain how you have determined the number of beneficiaries. We currently have 218 active young carers registered in South Oxfordshire, this number will increase over the funding period however we have used this total as a baseline. Although we may not see all of these young carers in the year it is likely we will see the majority of the young carers and will additionally support young carers who are not registered through our time in schools.</p> <p>In providing support to each young carer we are additionally providing support to many of their family members. Whose lives will additionally be improved by the support the young carer receives, especially in the improved wellbeing of young carers. Many of these young carers are additionally responsible for the care of a sibling, again whose life will be improved by the support the young carer receives. If we use an average of 2 additional family members are supported for each young carer than this would support an estimated total of 654 people in South Oxfordshire.</p> <p>218x3 = 654</p>
<p>Please describe who will directly benefit from your services/activities. Young Carers and parents/siblings with disabilities, learning disabilities, impairments, mental health or addiction. All of which are vulnerable individuals who are isolated. Additionally in being a young carer there are likely to be educational disadvantage and there may be increased levels of poverty. This is as many young carers face challenges within school including missing classes and their being a lack of understanding around areas like test results and homework. Therefore, they are more likely to be disadvantaged in this area than their peers.</p>
<p>Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council. Be Free Young Carers is the only charity in Oxfordshire providing support specifically for young carers, and there are very limited to no services available for young carers in South Oxfordshire. Therefore, as a charity, we are meeting a critical need for young carers in this area. With greater awareness and identification of young carers gradually increasing, having Be Free Young Carers in place ensures that support is already available. However, Be Free Young Carers should be complemented by support from the council to provide comprehensive assistance for young carers. Our team within the charity possesses a wealth of knowledge about young carers, which can be invaluable in supporting the council as they develop any related services.</p> <p>We also help to relieve pressure on oversubscribed services such as CAMHS by offering both proactive and reactive well-being support. By teaching young carers skills to support their well-being, we are likely to reduce the need for these services in the future. Supporting young carers can also positively impact their family members, which may, in turn, reduce the demand on council services, such as adult mental health support.</p>
<p>Emerging Corporate Plan priorities, outcomes and collaborations</p> <p>Emerging Corporate Plan contribution: Thriving and healthy communities</p>
<p>What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for? Outcome One - Young Carers Show Improved Mental Health and Wellbeing The Carers Trust report on the mental health of young carers found that 48% of young carers felt stressed due to their caring role. At Be Free Young Carers, our records indicate that 94% of our young carers experience some level of mental health struggle, which may include stress, depression, and other challenges. To address this mental health outcome, we offer three key wellbeing services.</p> <p>Our Mindfulness Movements programme is a preventative measure for primary school-aged carers, equipping them with mindfulness skills that can help them manage future mental health challenges. Additionally, we offer one-to-one emotional support and counselling services, which provide young carers with six weeks of targeted mental health support. Through these services, young carers are connected with a trusted adult with whom they can discuss their challenges and receive guidance. This approach has proven</p>

highly beneficial, as evidenced by feedback such as, "I really appreciate everything you're doing. It's so nice to start seeing him understand things better to help cope, and it's nice he's opening up."

By employing these approaches, we aim to enhance the wellbeing of young carers in South Oxfordshire.

Outcome Two - Young Carers Connect with Their Peers to Build a Community

Research by Action for Children found that 82% of young carers feel lonely during school holidays, a common reality for many. We aim to ensure that young carers have the opportunity to form friendships with peers who share similar challenges. It is also essential that young carers have access to activities and opportunities that they might otherwise be unable to enjoy due to the barriers posed by their caring responsibilities.

To achieve this outcome, we provide befriending, respite, and youth club services, all tailored to foster social connections among young carers. Our respite sessions are designed to offer school holiday activities, allowing young carers to take a break from their responsibilities and enjoy time with friends. Our befriending volunteers offer additional opportunities for young carers to engage in activities outside of their caring roles. Our youth clubs create a supportive community for young carers over the age of 13, where regular meetings help foster relationships that can be crucial in reducing isolation and loneliness.

"You help us to like make sure we like belong here. And you know you give us respite and stuff like that and so many opportunities which are like can genuinely be like life changing."

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

In order to run our mindfulness movements programme, we collaborate with two local yoga instructors. This service began through a collaboration with XXXX, one of our yoga instructors. XXXX, an ambassador for the charity, has lived experience as a young carer. Her passion led to the development of our mindfulness movement sessions, allowing us to offer preventative support for young carers' wellbeing.

We also collaborate with a trained counsellor to run our counselling sessions. Our one-to-one counselling sessions are for young carers identified as having complex needs, and they can access six sessions of counselling far more quickly than if added to the CAMHS waiting list. Oxfordshire CAMHS reported in June 2023 that there are 'long waits' for mental health support.

We frequently work with local companies and organisations to provide respite trips, befriending, and youth clubs. This has included trips to local cafés, restaurants, and activity centres. We plan to continue building partnerships and collaborating with local businesses to support these services.

In addition, we work closely with other charities, including organising visits to them through our respite trips. Collaborating with other charities helps raise awareness of young carers and ensures they access the right services. This might involve participating in events such as Oxfordshire Mind and Oxfordshire Youth's Youth in Mind conference, or working closely with organisations like 180 to provide the next levels of support a young carer may need.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

We have worked closely with The Carers Trust to produce our Social Return on Investment (SROI). Based on our current work, it has been calculated that for every £1 donated, the charity provides £9 worth of support to the community. As the charity grows and the number of young carers we support increases, this SROI is likely to rise, demonstrating that financial contributions to the charity will continue to benefit the community as the charity develops.

As the only young carers' charity in Oxfordshire, we aim to continually expand partnerships and raise awareness of young carers across our wider community. We will continue to strengthen existing relationships, which is essential for our growing services, such as the mindfulness movement programme. We will reflect with our yoga instructors on any challenges they may face and consider ways to enhance the experience for both instructors and young carers. By engaging in this reflective process, we ensure we are delivering the best possible sessions and providing maximum value in the service we offer.

We are consistently seeking new ways to engage with local companies for our various respite services and will continue to actively reach out to form these partnerships. To keep our respite services appealing to young carers, we need to offer fresh activities alongside those we know are popular. This is an essential aspect of our youth workers' planning for respite activities. Following a child-led approach, our youth workers

take young carers' preferences into account when selecting activities, which helps shape new partnerships. Additionally, we ask young carers for feedback after each respite activity to tailor future sessions based on their responses.

We also have connections with local businesses that support the charity through fundraising and volunteering. Many of these businesses have partnered with us for several years, providing sustained support. We will actively seek to continue these partnerships and expand to include other local companies that may be interested in volunteering or fundraising for the charity.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We have integrated ecology into the charity largely through our outdoor respite and collaborations with organisations like Harwell Campus and Earth Trust.

Services actioning climate change include:

Environmental Education Programs

- Workshops: Conduct regular workshops on topics like local biodiversity, conservation, and sustainable living practices.
- Respite Trips: Organise trips to nature reserves, farms, and conservation projects to provide hands-on learning experiences.

Outdoor Activities

- Nature Trails and Hikes: Plan guided walks and hikes in collaboration with Earth Trust to explore local ecosystems and learn about native species.
- Gardening and Farming: Collaborating with the earths trust to experience learning about sustainable agriculture and food systems before experiencing fireside cooking.

Partnerships and Collaborations

- Harwell Campus: Utilise resources and expertise from Harwell Campus to introduce young carers to scientific research and innovative ecological technologies. The campus has bee's onsite and have historically run bee talks with our young carers. Hosted by our patron XXXX. We are looking to run more of these beekeeper experiences.
- Earth Trust: Leverage Earth Trust's experience in conservation and land management to provide educational programs and practical conservation work.
- Wild Oxfordshire: Build connections with Wild Oxfordshire to find local areas where young carers can experience the full benefits of nature.

Mental Health and Well-being

- Eco-Therapy: Research found that 8 in 10 children expressed feeling happier in nature (The Children's People and Nature Survey for England, 2021). Eco-therapy sessions will be held, where young carers can benefit from the therapeutic effects of nature.
- Mindfulness in Nature: Teach mindfulness and relaxation techniques that can be practiced outdoors, helping young carers manage stress and build resilience.
- Combating barriers to nature: Young carers may experience barriers to accessing nature due to the condition of their cared for. Being able to experience nature through respite activities may be some of the only times they can have this experience of nature.

Community Engagement and Awareness

- Volunteer Programs: Encourage local community members and corporate partners and befrienders to volunteer in ecological activities and mentorship programs for young carers,.

We have additionally taken on active sustainability practices within the office. The charity has implemented sustainable practices in the charity's operations, such as becoming a paperless office and promoting the eco-friendly practices that Harwell Campus undertake. Including taking part in cycle to work schemes and

nature positivity events. The campus has won multiple awards for its sustainability including the BIG Biodiversity challenge 2023, Green apple environment awards for property maintenance 2023 and Business Awards UK environmental awards 2024.

By integrating ecology into the charity's activities, young carers can gain valuable knowledge and skills, enjoy the therapeutic benefits of nature, and contribute to environmental conservation. The holistic approach we offer can enhance their well-being and foster a deeper connection with the natural world.

<p>The Abingdon Bridge (TAB)</p>	<p>Ref: SRev25-27/26</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. If we do not receive the full amount requested or if we receive a percentage we will pursue the below:</p> <ul style="list-style-type: none"> • Utilize Free Reserves: We will draw from our free reserves to cover essential costs, ensuring that critical services continue uninterrupted. • Adjust Outputs: We may need to reduce the number of young people we can support, prioritizing the most impactful programs while still delivering quality service. • Seek Additional Funding: We will actively pursue alternative funding sources each year to bridge the financial gap, including partnerships, sponsorships, and fundraising initiatives. 	
<p>Q2. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Our objective over the next three years is to produce a balanced budget, with both income and expenditure at the levels we are currently operating at. Without additional funding we would have to look at reducing our core costs, to stay in line with our free reserves policy limits. Alongside just sustaining ourselves, we aim to be more creative and to invest more in developing more sustainable funding pathways. Our challenge is seeking out a credible funder that can support us for the next two years to cover the work in South Oxfordshire.</p> <p>To ensure we meet this financial objective, we are planning to proactively implement the following:</p> <ul style="list-style-type: none"> • Continue to deliver on proposed objectives for current funders. We will ensure our evaluations and reports demonstrate our impact. This will support any attempt for future funding opportunities. We are also planning to facilitate and host a funder and partner event led by our youth ambassadors to showcase impact for cost. • Continue our dialogue and build on our partnerships with our national funders to secure future funding. (we need to demonstrate grass roots support). • Work with Youth Ambassadors and volunteers to maintain and increase local grass roots funding opportunities. We will work more closely with Individuals, Councils, and Trusts. (look at creating fun events and appeals). • Create a new strategy to target and harness the local corporate sponsorship. We have been successful with this in the past and this is something we would like to grow and build on. (look at how we make donating easier on social media and our website). • Work with partners and other likeminded charities, to develop collaborative thinking and possible funding applications. We would seek support and advice from our local umbrella organisations (Oxfordshire Youth). We are also identifying other trusts that we feel share the same mission and objectives. • Connect and learn from other organisations, with regard to financial sustainability. (we may look create a training arm to help generate income). • Meet regularly as a finance group, to ensure we track, identify and monitor our financial progression. • If successful we would employ a part time individual to help lead on this strategy and create a plan, to ensure we can continue to thrive past the five years of Community Fund Support. 	

Theory of change and areas of development:

We are always striving to improve all aspects of our organisation. We are planning a “Future Directions conference this autumn. We have started to think about some of the themes/areas of focus to consider for discussion to develop further. Below are three areas we want to improve and enhance with your support:

In summary we can demonstrate strong and effective financial charity Governance with diverse range of income streams. We are also proposing detailed realistic forecasts for the next two years.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Financial Governance and Service Continuity

Strong Financial Governance: Our organisation has implemented rigorous financial management practices that ensure accountability and transparency. This commitment has allowed TAB to operate efficiently without cutting or reducing services over the past several years.

Diversified Funding Streams: By cultivating a variety of funding sources, we have been able to sustain and even expand our offerings. This diversification mitigates risks associated with reliance on a single funding source, ensuring stability.

Service Growth: Contrary to service reductions, our organisation has seen growth in both support and project delivery to meet local needs. This responsiveness demonstrates our commitment to addressing community challenges effectively.

Financial References: we can provide strong financial references from funders, which will reinforce our credibility and the effectiveness of our financial governance. These references can serve as testimonials to our responsible financial management.

Demonstrating Effectiveness and Impact: we recognise the importance of accountability when utilizing public funds. Our track record of producing balanced budgets while achieving steady growth illustrates our capacity to manage resources effectively while delivering impactful services.

Community Focus: our focus on meeting local needs has led to a significant increase in support and projects. This adaptability reflects an understanding of the community's evolving requirements and a dedication to addressing them proactively.

Conclusion

Overall, our strong financial governance, diversified funding strategies, and consistent service growth position our organisation as a reliable partner in enhancing community wellbeing. We hope these factors highlight our commitment to making a meaningful difference in the lives of individuals in South Oxfordshire.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

We currently receive around 9 new referrals per week from young people living in South Oxfordshire. This is in addition to the 49 young people from South Oxfordshire who are currently on our waiting list for support. It is very clear there is a huge need for further preventive Mental health support for young residents. we really need your support to keep up with demand, The need for our services has never been so great.

Lead with the need:

We aim to support the most vulnerable core groups across South Oxfordshire who are mostly, but not exclusively, from low socioeconomic backgrounds. They are variously disengaged from the community, succumb to negative peer pressure, have poor life skills, and engage in multiple risky behavior such as substance abuse, antisocial behavior, low engagement in education and employment, self-harm, and suicidal idealization. We also support young people who have supporting, loving families, they however, may feel stuck or going through a crisis and need support.

Through our assessment process and needs focused sessions with young people we capture the presenting challenges that the young person is experiencing. We are aware that many young people do not share or disclose the full extent of their need until a positive relationship can be established.

Current issues facing young people living in South Oxfordshire who use our service:

- 8.5 out of 10 clients present with anxiety/stress. 1 in 5 clients are having panic attacks
- 1 in 3 clients are feeling depressed
- 1 in 2 of clients have low self-esteem
- 1 in 4 clients are self-harming
- 1 in 5 are experiencing being bullied
- 1 in 6 have suffered some form of abuse, emotional, physical or sexual
- 1 in 10 have an eating disorder
- 1 in 2 of the clients site family relationships as a problem
- 1 in 2 feel disconnected from the community
- 1 in 10 have acted on Suicidal thoughts and have made attempts (men aged 16-25).

There has been a huge spike in presenting issues such as anxiety, low mood, and risky behaviors. This has resulted in more young people needing secondary care, taking medication, family breakdowns, self-harm, and school refusal. We believe our proposed activities will positively impact the wellbeing of the next generation and their parents. we need to get ahead of the curve to educate and build resilience for future generations.

TAB has the skills and Mental health knowledge to provide the services that are so needed. We have also worked in conjunction with the Didcot wellbeing web, Didcot TRAIN, SOFEA to map out future support initiatives so we know this is really needed. One size does not fit all - this is why we are proposing several flexible approaches to address the above needs.

We have also attached some photos of the outputs from a recent focus group, along with some self harm data and school absence data for Oxfordshire.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We are very much client led and we champion the diverse voices of South Oxfordshire residents. Part of our ethos is to hear the voices of local young people and learn from it to help inform our future directions. We have a regular client focus meetings to look at client feedback, data and statistics. we have attached a photo of a focus group that young people help steer.

We need meaningful involvement from young people This led to us creating a youth led committee, the Client Advisory Group (CAG). This is made up of past and current clients and other young people from the local area. They support the clinical team in the development, design and delivery of our activities. They are the voice of our clients / potential clients. They guide us and provide feedback on website development, any material we publish and even our counselling room design.. This group is going to be key in influencing our services to ensure we continue to develop new ways to engage vulnerable clients. The Ambassador incentive is also vital in keeping TAB aware of current issues in youth culture, for example the impact of county lines and social media.

We have consulted with local schools, SOHA and our partners through the CSP and wellbeing web. Its evident there is a huge need for more additional mental health support across SO. This project will enhance the work of our partners offer and avoid duplication as we will be the only charity delivering Counselling and tier 2/3 support. We have also have several exploratory sessions with CAMHS and the local primary care network where both have highlighted a huge need for increased provision across SO for more mental health support.

We plan to hold a quarterly consultation review with our partners and other stake holders to monitor the effectiveness and impact our work has collectively. We are fully aware we cannot meet all the need on our own, that's why it is vital for more open conversations in the spirit of good partnership and collaboration.

Earlier this year we also facilitated several parent workshops (all were over subscribed) it is very clear that there is strong evidence for additional parents workshops and support. we currently do not have enough resources to keep up with the demand. one parent said "this group had been highly valuable to myself and

my family. I have learnt new ways to communicate with my son that feels healthier. the whole family feel less stressed. i really hope you get your grant to help other families like us" XXXX (parent) we have also attached some slides that parents helped put together.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups. Equality, Diversity, and Inclusion statement (EDI)

TAB is fully committed to creating an equal and inclusive safe environment for people of all backgrounds and experiences. TAB has always promoted that we are open to all young people. We are seeing more diversity within the referrals we receive. As an organisation, we aim to support and create opportunities for people with lived experience of inequity, systemic oppression, or discrimination, to thrive and influence our strategic direction and improve our offer to young people. Collectively (staff, youth ambassadors and trustees) would like to explore this further, so that we can attract more trustees, staff and youth ambassadors with lived experience of the above. We also would like to learn how better to identify and support young people who may feel marginalised- through training and working with our partners.

Our charity invests in regular training to ensure our staff team have knowledge and support around harnessing EDI. We also ensure there is space and support at our regular clinical discussion groups, to reflect and ensure we are maximising opportunity, whilst understanding the barriers around EDI. Our Youth Ambassadors also contributed to this and have hosted several events over the last 18 months- showcasing our commitment and appreciation around EDI.

TAB have recently joined a new initiative with our county partners, Oxfordshire Youth. They are developing a Sector Equality, Diversity, and Inclusion (SEDI) group. This group is specifically designed to cater to the unique needs and challenges of the sector. TAB has also helped in the design of this county wide group.

In summary TAB is committed to fostering a culture that respects and values diversity, it actively promotes equality, and ensures inclusion in every aspect of the charity operation. It is our duty to model the values of equality, diversity, and inclusion - as these shapes the worldviews and attitudes of the young people we serve.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To determine success in meeting the needs of all users, including vulnerable or priority groups, several indicators can be assessed through our tried and tested methods.

- **User Feedback:** Collecting and analyzing feedback through surveys, interviews, and focus groups helps understand user satisfaction and identify areas for improvement.
- **Engagement Metrics:** Monitoring usage patterns, participation rates, and engagement levels can reveal how well services are reaching diverse groups.
- **Accessibility Assessments:** Conducting regular evaluations of accessibility features ensures that resources are usable for individuals with disabilities and those from different backgrounds.
- **Outreach and Inclusion:** Tracking outreach efforts and their effectiveness in engaging priority groups can demonstrate success in inclusivity.
- **Outcome Measurement:** Assessing the impact of services on users' lives—such as improved well-being, access to resources, or increased opportunities—provides concrete evidence of success.
- **Diversity in Representation:** Evaluating whether the user base reflects the diversity of the community can indicate effective outreach and engagement.
- **Partnerships with Community Organisations:** Collaborating with local groups focused on vulnerable populations can enhance understanding and responsiveness to their needs.
- **By using a combination of these methods, a comprehensive picture of success can be formed, ensuring that the needs of all users are met effectively.**

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each

year?
550

Please explain how you have determined the number of beneficiaries.

Our initiative outlines a comprehensive approach to supporting mental health among young people and their families in South Oxfordshire. Here's a structured overview of our plans:

Preventative 1-to-1 Counseling Sessions

Target: Support 50 young people per year.

Delivery: Over 600 sessions aimed at providing personalised support, helping young individuals develop coping strategies and resilience.

Psychoeducational Workshops / Group Work

Target: Support an additional 35 young people per year in group settings.

Community Impact: Engage approximately 350 individuals annually through broader community workshops focused on emerging themes, fostering a sense of belonging and shared learning.

Youth Ambassador Programme

Structure: Recruit five young people as ambassadors.

Impact: Each ambassador will support five peers, creating a network of support and empowerment within the community.

Parent Support Groups

Support Offered: Around 50 parents per year.

Objective: Provide a safe space for parents to share experiences, gain insights, and learn effective parenting strategies related to mental health.

Campaign Targeting Men Aged 18-25

Rationale: Address the recent increase in male suicide rates in South Oxfordshire.

Plan: Open an additional 10 counseling places per week.

Run a weekly support group, aiming to reach a total of 50 young men, providing a dedicated space for discussion, support, and mental health resources.

Overall Impact

This comprehensive strategy not only targets young people but also extends support to parents and the wider community, creating an interconnected network of mental health resources. By focusing on both preventative measures and targeted interventions, we aim to create a lasting positive impact on mental health in South Oxfordshire.

Please describe who will directly benefit from your services/activities.

The activities outlined will benefit a variety of groups in the community, including:

- Vulnerable Young People (Aged 11-25) mostly but not all economically-disadvantaged, educationally-disadvantaged.
- Those experiencing mental health challenges.
- Individuals seeking personal development and coping strategies.

Parents and Guardians:

- Parents of young people struggling with mental health issues.
- Caregivers seeking support and resources to help their children.
- Those wanting to connect with other parents for shared experiences.

Young Ambassadors:

- Selected youth who will gain leadership skills and personal development through the Youth Ambassador Programme.
- Peers supported by the ambassadors, benefiting from their guidance and support.
- Men Aged 18-25:
 - Young men specifically targeted by the new campaign addressing rising suicide rates.
 - Participants in the additional counseling sessions and support group.

Community Members:

- Broader community participants in workshops, addressing common themes and fostering a sense of

belonging.

Individuals seeking general mental health education and support.

Improved mental health can have a profound impact on a community in several key ways:

- **Enhanced Well-Being:** Individuals with better mental health experience higher levels of happiness, fulfillment, and life satisfaction, contributing to a more positive community atmosphere.
- **Increased Productivity:** Improved mental health can lead to higher productivity levels in workplaces and schools, resulting in better performance and outcomes for individuals and organizations.
- **Stronger Relationships:** Mental well-being fosters healthier relationships, reducing conflict and promoting social cohesion. This can lead to more supportive community networks.
- **Reduced Stigma:** As mental health awareness grows, stigma decreases, encouraging more individuals to seek help and support without fear of judgment.
- **Lower Crime Rates:** Improved mental health can lead to decreased incidences of violence, substance abuse, and crime, contributing to safer neighborhoods.
- **Economic Benefits:** Communities with better mental health often see reduced healthcare costs and increased economic contributions from individuals who are healthier and more engaged.
- **Increased Community Engagement:** Mentally healthy individuals are more likely to participate in community activities, volunteer, and contribute to local initiatives, fostering a sense of belonging.
- **Better Educational Outcomes:** Improved mental health among students can lead to higher attendance rates, better academic performance, and increased retention in schools.
- **Crisis Prevention:** A focus on mental health can help identify and address issues before they escalate, reducing the need for crisis interventions and emergency services.
- **Holistic Development:** Communities that prioritize mental health often adopt a more holistic approach to health and well-being, addressing physical, social, and emotional needs collectively.

Overall, the positive ripple effects of improved mental health can lead to more resilient, connected, and thriving communities.

Schools can benefit indirectly through improved mental health outcomes for students. Educators seeking resources and support for students in need.

Local organisations can partner and refer individuals, creating a supportive network within the community. By reaching out to these diverse groups, the initiative aims to create a more resilient community with improved mental health awareness and support.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The services and activities we are requesting funding for complement council services and help reduce the likelihood of needing further support from the council in several ways:

Preventative Approach: By offering preventative 1-to-1 counseling and psychoeducational workshops, the initiative addresses mental health issues before they escalate. This proactive strategy can decrease the demand for more intensive and costly council services, such as crisis intervention or emergency mental health support.

Community Empowerment: The Youth Ambassador Program and parent support groups empower individuals and families to build resilience and coping strategies. By fostering self-help and peer support, the initiative can lessen reliance on formal council services, promoting community-led solutions.

Targeted Support for Vulnerable Groups: The specific focus on young men aged 18-25, who are at higher risk of mental health issues, addresses a critical gap in existing services. By providing tailored support, the

initiative can help prevent issues that might otherwise require intervention from council resources.

Collaboration with Existing Services: The initiative can work in partnership with council services, enhancing the referral process and ensuring that individuals receive timely and appropriate support. This collaboration maximizes resources and creates a more integrated service delivery model.

Reduced Social Isolation: The community workshops and group work foster connections among participants, combating social isolation. By improving social support networks, individuals are less likely to require assistance from council services related to loneliness or mental health crises.

Education and Awareness: Psychoeducational workshops increase mental health literacy in the community. By equipping individuals with knowledge about mental health issues and coping strategies, the initiative can help prevent problems that might lead to requests for council support.

Economic Impact: Improved mental health within the community can lead to higher employment rates and productivity, resulting in reduced economic strain on local government services. Healthy individuals contribute to the local economy, lessening the need for council-funded support programs.

By addressing mental health needs holistically and proactively, these services not only complement existing council initiatives but also contribute to a healthier, more resilient community that relies less on council resources.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:
Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

We believe all of the below strongly influence and positively impact "Thriving healthy communities" Ultimately good mental health positively impacts healthy connected communities.

Outcomes

TAB have devised three outcomes that we can measure and evaluate to track progress and the impact of our work (these have been devised in partnership with young people through a previous SODC grant)

We collect different types of evidence including:

- Quantitative and qualitative.
- Evidence from experience, stories, and reflection.
- Staff and community observations.

We only generate evidence in safe ways, that are fully consented by the individual. We focus on evidence that we can action - both internally and that we can show case at a county level. We are part of the wider Oxfordshire Wellbeing Network. Our focus is to ensure safety and contribution to improvement, whilst knowing what we are achieving our desired Key Performance Indicators (KPI's.) These are reviewed by the board of Trustees quarterly.

Outcome 1- Young people show increased resilience and are less likely to participate in risky behaviours.

Outcome 2- Young people will have improved aspirations and report to be more confident about their futures.

Outcome 3- Young people will have a greater sense of their emotional well being and will be less anxious and stressed.

*** Parents who attend the groups and workshops will have increased confidence to openly express their feelings and improved communication with their child. Our parent support groups can yield numerous positive outcomes, including:

Emotional Support: Parents gain a sense of belonging and understanding from others who share similar challenges and experiences.

Shared Resources: Members exchange practical advice, tips, and resources related to parenting, education, and child development.

Increased Knowledge: Workshops or discussions can enhance parents' understanding of child psychology, effective discipline strategies, and developmental milestones.

Skill Development: Parents may learn new skills for communication, conflict resolution, and stress management that they can apply in their parenting.

We have also devised three indicators for each outcome and have set a benchmark of 75% improvement rate for each outcome. Sadly there is not enough space to include these. We can send additionally if needed. We also have set Outcome for our Youth ambassadors.

Our work is measured through Pre and Post assessments. Each young person completes a Pre and Post evaluation. This enables us to measure the progress and impact. We will also seek residents feedback through SurveyMonkey – after workshops and group work.

Collecting data enables us to learn from services we deliver. Part of our regular staff and trustee meetings are used to analyse the data and the impact. We ensure we have tracking meetings to ensure we deliver on each outcome. We have now also devised an “occupancy tracker”, we use this to ensure the money is being used efficiently.

The above is routinely revisited to ensure the appropriateness of outcomes. Local young people have been included in forming these strong outcomes, involving local young people in shaping and revisiting outcomes ensures that your initiatives remain relevant and impactful.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

To increase impact and relevance TAB continually works to build and maintain effective partnerships with the organisations most likely to be engaging with vulnerable and complex young people; schools (especially in target areas), charities, police, social services/youth offending teams, CAMHS, GP surgeries, CSP, youth clubs and churches. We are often approached by these services when they are seeking advice or support with young people in regards to their wellbeing. We have regular meetings with our local partners to ensure there is no duplication and explore opportunities to work in partnerships. We have made huge progress with partnership working through our involvement with Didcot powerhouse.

TAB continues to grow in stature; we continue to work in partnership with the following organisations:

- Oxfordshire Youth Oxfordshire
- Oxfordshire Mind
- CAMHS
- YOCO (Youth challenge Oxfordshire)
- Most Schools across the South
- TRAIN (Didcot detached youth project)
- Berinsfield youth project
- National Citizen Service
- SOHA
- SOFEA
- CSP
- BefreeYC.

We champion the spirit of partnership working and collaborative thinking. Some of the activities we are planning to deliver have been co-produced with other charities from South Oxfordshire.

Charity collaboration can be incredibly beneficial for all organisations and the communities we serve. Here are some key points highlighting the importance of some of our recent partnerships:

- Resource Sharing: Collaborating allows us to pool resources, whether that's funding, expertise, or volunteers, which can lead to more effective programs and services.
- Enhanced Impact: By working together, we can amplify their impact, reaching more people and addressing complex issues more comprehensively than they could alone.
- Knowledge Exchange: Collaboration fosters the sharing of best practices and innovative ideas, enabling organizations to learn from one another and improve their approaches.

- **Stronger Networks:** Building partnerships can create a support network that enhances resilience and sustainability, making it easier to navigate challenges
- **Community Engagement:** Collaborative efforts can engage a broader segment of the community, fostering a sense of ownership and investment in local initiatives.
- **Advocacy Power:** A united front can amplify voices in advocacy efforts, leading to greater awareness and policy changes that benefit the communities served.
- **Increased Visibility:** Working together can enhance visibility for all organisations involved, attracting more attention from donors, volunteers, and community members.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

(Note: collaboration is also tricky in practice. it can also feel frustrating when charity's may not share the same ethos or mission. we pride ourselves on being hard working, efficient and cost effective to enable us to support as many people as possible. It can feel frustrating when others may not share the collaborative thinking)

By fostering collaboration and focusing on previous strategies, we feel confident that we can enhance resilience and sustainability while continuing to serve the community effectively. we are planning to be more involved with the Didcot well-being web, this will ensure good opportunities to forge stronger partnerships with other organisations: we could also explore the following with our charity partners.

Community Engagement:

- **Volunteer Networks:** Build a network of volunteers across organisations, allowing for shared recruitment and training efforts that maximize community involvement.
- **Feedback Loops:** Regularly engage with the community to gather insights and adapt services to better meet our needs, increasing the likelihood of continued support - we could do this by co delivery of focus sessions.
- **Joint Marketing Efforts:** Develop a shared marketing strategy to promote services and events, enhancing outreach and reducing individual marketing costs.
- **Storytelling and Impact Reporting:** Share success stories that highlight the collaborative impact of your work, attracting donor interest and engagement.
- **Long-term Planning - Sustainability Assessment:** Regularly assess our collective sustainability strategies and adapt as necessary. Use data and feedback to inform future initiatives.
- **Strategic Planning Workshops:** Hold workshops with partners to collaboratively develop long-term financial sustainability plans, ensuring all voices are heard.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

TAB strive to promote Nature recovery and protect our environment, we do this by:

- **Energy Efficiency Improvements:** invest in energy-efficient technologies and practices, reducing our overall energy consumption. (recently purchased timers for the heating)
- **Renewable Energy Adoption:** currently exploring solar at our offices
- **Sustainable Transportation:** promoting public transportation and cycling among employees can significantly lower emissions.
- **Waste Reduction Initiatives:** Programs aimed at reducing, reusing, and recycling materials to contribute to less waste and lower carbon footprints.
- **Employee Engagement:** Educating and involving employees in sustainability initiatives fosters a culture of environmental responsibility.

The Berin Centre	Ref: SRev25-27/28
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. There is no shortfall anticipated, but we intend to continue to fundraise proactively.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. We continue to nurture relationships with local donors and are continually making efforts to expand our network of supporters to ensure that any donors who may have been with us for some time and are considering new opportunities might be replaced with others who we have been engaging in preparation for some time. In addition, we anticipate that our Community Cafe may become an active part of our service delivery during this period. Whilst we are not relying on the cafe generating any income in our planning, we will be working towards it becoming financially self-sustaining over time. The new building will also incorporate solar panels for both the cafe building and our existing building, which will significantly reduce our utility costs.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. We have seen an increase in service use such as emergency food bank provision and tailored 1-1 support, and recognise that our services are more of a lifeline than ever for many in our community as they grapple with soaring costs of living. Our staff have also struggled to make ends meet at times, so we've recently adopted the Oxford Living Wage despite being outside of Oxford City in recognition. We use the NJC Payscales to review salaries annually and ensure that any increases are spread proportionately as opposed to using a flat percentage increase for all staff. Despite this we have remained steady in our finances, due to very proactive fundraising and prudent financial management.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. Everything we do is informed by understanding the local needs and in recognising that they change. We invited two interns from Oxford University to compile a data report about Berinsfield demographics to give us a better understanding of employment rates, ethnicity and languages spoken, children in poverty etc. SODC then developed a further data insight report as part of it's Health and Wellbeing efforts. We use both of these to inform us. We then employ a range of mechanisms to gain feedback and input, including:</p> <ul style="list-style-type: none"> • Annual survey (users and potential users of service - impact made, what they'd like to see from us in future). • Bi-annual storytelling methodology case study collection to better understand beneficiary journeys in greater detail. • Activity-specific feedback and input such as voting on workshop topics in our Family Services (such as going on holiday with your baby, and understanding children's mental health), and our Family Links Programme feedback forms (which our overwhelmingly positive). • Involving community members in creating new projects or activities, such as our Maternity Library being co-developed with a group of parent/grandparent volunteers. • Engaging in other consultation or engagement activities, such as the FEAST research project in partnership with GFO to better understand eating habits, challenges and aspirations to inform future work. • Consult and collaborate with local partners, in particular through the Community Network Meeting 	

- that we host to give partners the opportunity to share information and resources bi-monthly.
- Running focus groups and administering surveys for developing new initiatives such as our Community Cafe.

We use all of this data to inform us on a rolling basis, but in particular at our November Strategy Day where staff and trustees come together to set our Strategic Priorities for the coming year. These are currently:

- Develop the reach and impact of our existing family and community services
- Continually evaluate the community's evolving needs and implement additional or adjusted services in response, whether directly delivered or provided by partners
- Improve and develop our physical space, including the construction of a multi-purpose Community Café
- Strengthen our fundraising approach, continuing to develop positive relationships with donors and funders.

We use these Strategic Priorities to set our actions on a six-monthly basis, allowing plenty of space to be responsive to emerging needs and ideas from the community, enabling us to be agile, consultative and truly needs-led.

We are therefore confident that every service we are currently delivering or plan to deliver is solidly grounded in local needs and desires, and input from the local community has very much shaped our three key strands of work (family, community and food services). Local people have told us and continue to tell us what they need from us, what challenges they're facing, and our mission is to respond with relevant and appropriate activities that have been shaped by the people who will use them.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We work with a broad cross-section of the community, including families of very young children (antenatally, postnatally, and throughout early childhood), elderly people, people who are isolated, people who are out of work or education, people with disabilities and mental health problems, people with substance misuse issues, those who are vulnerably housed, homeless or experiencing fuel poverty, those with limited income, people who experience racism or discrimination. We really do aim to be a service for everyone in the community, and where we aren't the appropriate agency to offer specialist work we aim to host relevant partners here at the centre to make their services more accessible.

We work hard to identify groups who aren't yet engaging with us but who might have unmet needs. For instance as part of our Growing Minds school readiness project we engaged an independent researcher to carry out an evaluation and to identify any groups who are represented in our community but who weren't engaging in this universal offer (available to all families in Berinsfield with a child under 5 years of age). The research made some recommendations to promote greater accessibility and inclusion such as using key languages on posters, carrying out home visits to specific families, and offering a specific taster session. On implementing these recommendations, our engagement with the groups she'd identified increased.

We also launched a Women's Multicultural Group in response to a number of people from ethnic minority groups reporting that they didn't always feel entirely welcome in the village - we worked with them to identify what they'd like from a group of this type and developed it together, and through word of mouth this has now become a thriving part of our regular schedule.

All activities that we provide stem from an observed or articulated need, and we aim to involve people in the development of new ideas, and the ongoing review of existing ones, as much as possible. We provide volunteering opportunities, such as delivering our weekly Community Larder, and we also aim to make groups self-sustaining and increasingly independent where appropriate. For instance, we initiated a regular group to compile and issue a regular village newsletter, The Village Voice. We spent time developing skills, listening to the priorities of the group members, and facilitating reflection from one edition to the next. It became clear that this group were increasingly capable of managing this initiative on their own, and they began to articulate a desire for greater autonomy over the newsletter. We therefore worked with them to explore options for becoming a separate entity, ultimately resulting in them becoming a Constituted Community Group with their own bank account and insurance. They continue to operate independently, and we support them by providing a free of charge room for their regular group meetings and guidance when they need it.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

We are transparent in advertising roles with payscales, encourage applications from people who don't necessarily meet all the criteria, offer reasonable adjustments at interview and employment, and encourage all staff to complete a Wellness Action Plan (National Mind).

We use representative imagery and inclusive language in our marketing and communication.

We had an accessibility audit carried out on our existing building, and one is planned for the Community Cafe building project.

Staff undertake relevant training where needed such as unconscious bias training.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We will use the mechanisms stated previously to monitor and review our activities, and to involve beneficiaries in our planning. We will use the data provided to us in the reports shared here to check against our own attendance monitoring to gauge whether groups are representative of the needs and demographics present in the local area.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

86

Please explain how you have determined the number of beneficiaries.

Funding requested represents approximately 9% of our total budget for each year. In 2023/24 we saw approximately 700 distinct individuals access our services (with over 9,000 engagements/interactions). We've used these figures to attribute approximately 9% of our anticipated beneficiaries (assuming a consistent trajectory of growth from previous years, c.36%) to the activities supported by this funding.

Please describe who will directly benefit from your services/activities.

People attending the centre present with a wide range of economic, social and environmental needs. We already engage with children (0-5 and beyond), parents, adults, and older people (aged 60+). Berinsfield itself has high rates of low income households, food poverty, and children living in poverty, but we also attract frequent repeat visitors from the surrounding area which has a much more varied economic background. People attend with a range of physical and intellectual disabilities of varying levels, and mental health problems are also common. We provide a vital space that can facilitate both structured and supported opportunities for social mixing, as well as informal opportunities for chance encounters, leading to greater community cohesion.

We see approximately 65% of beneficiaries from the Berinsfield Parish; 20% from the surrounding parishes of Dorchester, Clifton Hampden, Long Wittenham, Little Wittenham, Warborough, Benson, Drayton St Leonard, Marsh Baldon, Nuneham Courtenay, Toot Baldon and Stadhampton; and the remaining 15% from farther afield including Oxford, Henley, Didcot, Abingdon, Faringdon and Culham.

For context, in 2023 families registered as users of our family services at The Berin Centre represented the following geographical areas:

- 42% from Berinsfield
- 17% from the surrounding area including Dorchester, Stadhampton, Burcot, Toot Baldon, and Warborough
- 41% from farther afield including Didcot, Abingdon, Blewbury, Chalgrove, Wallingford, Headington, Wootton, Garsington, and Bicester.

The majority of the families we work with are isolated and vulnerable.

We work with people who are vulnerably housed or are homeless, providing our services in close collaboration with housing associations and the District Council to avoid duplication and maximise on resources. We also support people who are experiencing food poverty by providing an emergency food bank.

We offer adult learning courses to raise aspirations and provide opportunities for accredited and

unaccredited educational attainment.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

We are a broad, flexible, place-based service.

Our mission is 'to provide family and community services for Berinsfield and the surrounding villages'. This gives us a clear remit to be responsive to the holistic needs of local residents. We therefore track them through all stages of life, offering support and solutions for the wide range of challenges that they may encounter.

This often positions us upstream from council services - doing preventative work to avoid them needing to utilise statutory services and supports at all. From delivering parenting programmes, tailored family support, working to develop skills and increase independence etc, we can avoid many residents needing to access council services, social services, benefits or certain health provision entirely.

We also work closely alongside partner services - for instance reducing anti-social behaviour by working 1-1 with vulnerable adults, providing access to information and advice by housing Citizen's Advice clinics, and making referrals to SODC's Community Hub when relevant schemes are available.

Lastly, we're here to intervene when things have reached crisis point - when members of our community are at risk of losing their homes or have lost their source of income, when they are isolated and their mental health is at risk, we are a trusted source of help. Where appropriate we might provide direct support through any of our groups or 1-1 offers, or be in a position to make an introduction to relevant specialist services in a manner that feels safe and accessible. We work closely with the Social Prescriber, and we make use of our small discretionary Hardship Fund to alleviate defined short-term financial pressures or make opportunities accessible, such as urgent car repairs to enable children to attend school, or Food Hygiene certificates to create the basis for a new micro-business.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Due to the breadth of our service offer, we also utilise an array of impact measurement approaches. This includes an engagement tracker to monitor each individuals' interactions with our services (how many individuals, how many times, which services/activities), and rich case studies compiled using Storytelling methodology.

We're implementing the use of Theories of Change across the organisation, with our Family Services leading the way - articulating clearly what needs we aim to address, what outcomes we hope to see, and what activities we must undertake in order to achieve this.

For our Growing minds school readiness project we collect a robust data set including termly surveys, annual surveys, behaviour change indicators and Good Level of Development data. This project is delivered in partnership with Peeple, Homestart Oxford, and Abbey Woods Academy primary school. We routinely monitor reading at home behaviours, parental confidence, home learning environment behaviours, and Good Level of Development for this project. We host bi-annual Learning Events to share our practice and accumulating learning with others, both within the county (including council representatives and VCS representatives) and nationally.

We then use a variety of specific surveys/questionnaires to identify impact from different activities, for instance, in our Lawn Games Group we asked some simple questions about physical health, loneliness, and confidence as this activity aimed to improve physical health and reduce isolation for older people - our results found that the activity achieves it's objective.

We're currently working with Good Food Oxfordshire to deliver the FEAST research project exploring barriers to healthy eating, and this project involves working with local residents to co-design an intervention that might overcome some of the barriers they identify - this is a very current example of how we work with partners and with the local community to vision, plan and deliver services to best effect.

Whilst some of our services are universal and open access, others have specific target groups such as our Women's Multicultural Group.

Across our services we expect to see the following outcomes:

- Increased confidence
- Reduced isolation or loneliness
- Improved knowledge and/or skills
- Raised aspirations
- Increased wellbeing
- Improved physical health and/or fitness
- Reduced food waste.

These outcomes are core to our purpose, and sit firmly within our Mission and Strategic Priorities as previously mentioned. They are an active and consistent part of our culture and our planning, and all staff are aware of and committed to these aims, with clarity on how their part of service delivery contributes to these wider objectives.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

As above, we proactively work with a range of partners to ensure that services are widely available and accessible to local people, and that we can draw on specialist knowledge, skills or resources as appropriate.

We collaborate with the following partners:

- Local organisations such as the Berinsfield Community Association in hosting SEN friendly film screenings and the Church in coordinating their new community garden project. We also chair the local Community Network Meeting 6 times per year to maximise on limited resources and share information and opportunities.
- In the process of establishing a local Early Years Network involving the 3 closest primary schools, nurseries and preschools to ensure a robust universal offer for families with young children.
- Run short projects with nearby family friendly attractions such as The Story Museum, Harcourt Arboretum, High Lodge Farm, Checkendon Equestrian Centre, to provide otherwise unaffordable or inaccessible opportunities to local families.
- Key partner in the innovative Growing Minds project delivered by ourselves, Peeples and Home-Start Oxford across a minimum of 7 years.
- Host Riverside Counselling at the centre 5 days/week, Citizen's Advice appointments twice a month, weekly appointments for OXPIP, and monthly clinics for the Health Visitors.
- Deliver a weekly Community Larder in partnership with SOFEA and Fair Share, and are a referral partner for Wallingford Emergency Foodbank.
- Community partner for the international FEAST research project coordinated by Good Food Oxfordshire, and were also recently part of their annual Pumpkin Festival through our Community Kitchen Garden events.
- Working with OCC, Oxford Maternity Clothes Library, Oxford Cloth Nappy Library to plan our upcoming Maternity Library.
- Working closely with CAG Oxford, OCC, SODC and Berinsfield Church to deliver the Community Garden project.
- Currently attempting to negotiate with Turning Point to bring their drug and alcohol services more consistently into the village.
- Have a role on both the Berinsfield Garden Village Steering Group and the Berinsfield Health and Wellbeing Group.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

We hope to construct our new Community Cafe building in 2025, and whilst this is not an income generation venture we hope that in time it will contribute to it's overall running costs. As part of this project we will be installing solar panels on both the roof of the new building but also on the existing building - our heating is purely electric so this will make a substantial difference to our ongoing energy consumption costs.

We aim to continue to provide room hire opportunities for external partners, and to continue to collaborate with others - recognising that whilst we have our own contribution and expertise, we do not need to do everything ourselves! This makes best use of everyone's limited resources - applying the right service to the right situation, and reduces unnecessary costs.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

- Plans to install solar panels and air source heat pump in new building in 2025. New building will achieve BREEAM credentials, although we will be exempt from needing to attain the accreditation.
- Make use of recycled/repurposed materials in many of our groups, particularly our family groups.
- Establishing a Maternity Library which will encourage the borrowing and re-use of maternity clothes and baby slings, and also make available reusable cloth nappy kits.
- Encouraging community growing and developing sustainable growing knowledge through our Community Gardens Project.
- Reducing food waste through our Community Larder.
- Ongoing consultation about possible Repair Cafe and Refill Shop in future.

<p>Oxfordshire Youth</p>	<p>Ref: SRev25-27/49</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. We have applied for the full cost of the activities to be delivered. If we are not awarded the required funds, we will scale down the programme accordingly, reducing the number of schools we deliver the Transitions programme to and reducing the numbers of young people participating in the Young Leaders Programme.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Since securing the £1.6m contract from Oxfordshire County Council for YPSA in 2020, our core costs have quadrupled and until January of this year, we had only one consistent FTE fundraising post in place to meet this exponential increase in funds required. Our core costs have risen to match the additional resources and infrastructure required to effectively manage and sustain our operations.</p> <p>Adapting to our rapid growth and the need to secure core costs has necessitated significant enhancements to our fundraising infrastructure. In 2023, we benefited from 12 months of pro bono support from a fundraising consultant. This allowed us to audit our existing fundraising systems and tools, implement a robust fundraising strategy, funding model, sophisticated prospect pipeline tracker, relationship portfolio management processes, and train our team to adopt new processes.</p> <p>We will continue to work on building a powerful body of evidence for the impact of youth work on marginalised youth communities, to further strengthen applications to core grants funders and multi-year agreements with the aim of achieving full core cost recovery. In addition, we are also committed to applying rigorous costs savings to reduce core funding pressures, securing long term rent free premises, and bolstering our income through diversifying our come streams, including two new corporate partnership models.</p> <p>The Business Guardians Programme is an innovative new model which has launched in Autumn 2024, with the core focus of fostering long-term partnerships with values-driven and reputable businesses in Oxfordshire. The program aims to secure sustainable financial support for OY’s core operations, reducing the burden on senior leadership and fundraisers to secure core costs, while also offering mentoring, employability opportunities, and resources to disadvantaged young people. By engaging 12 founding businesses across various industries, the program will help OY target systemic issues like youth unemployment, mental health challenges, and social inequality, ultimately supporting 26,000 young people annually. To date we have been successful with securing the support of Blenheim, Lucy Group, Ebbon Group.</p> <p>In exchange for their financial and strategic support, Business Guardians receive various benefits, including promotional opportunities, access to exclusive events and a diverse pipeline of talented young people entering their workplace. The model emphasises long-term, transformative relationships rather than short-term transactional engagements, fostering deeper societal impact and innovation. Through this program, OY seeks to create a self-sustaining ecosystem that addresses both the operational needs of the charity and the developmental needs of young people, paving the way for long-term societal change.</p> <p>The Round up for Youth initiative presents a solution that creates a passive income stream, freeing us up to focus more on our programs and services. By partnering with cafes, supermarkets and restaurants, we can create a mutually beneficial relationship: businesses and organisations can enhance their corporate social responsibility (CSR) profile while supporting a vital cause, and we can secure the funding needed to sustain our programs.</p> <p>We are also preparing robust bids for submission to The Garfield Weston Foundation (£100,000), National Lottery Community Foundation (£244,000) and BGF (£150,000).</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.</p>	

Oxfordshire Youth experienced remarkable growth, with income increasing from £428k in 2019-20 to £2.8m in 2021-22. This was due to winning a major supported housing contract with Response from Oxfordshire County Council for our YPSA service, together with additional funding for youth programs during and after COVID-19. However, short-term emergency funding posed challenges, leading to fundraising difficulties as grant funder priorities shifted toward smaller charities. This resulted in a surplus deficit in 2022-23, prompting OY to reduce costs and workforce. We are pleased to report we recovered our position ending the financial year 23/24 with a small surplus.

We have traditionally been funded by grants, trusts, and small to medium local government contracts. However, since securing the YPSA contract, our annual income threshold has exceeded £2m and as a result we have faced significant fundraising challenges securing funding for our youth development programmes. Major repeat funders like Children in Need, the Co-op and Oxfordshire Community Foundation have lowered their income thresholds, rendering us ineligible to apply.

OY is determined to achieve financial resilience, recover our healthy reserves position, diversify income streams, and ensure we are there for young people and the sector at a time where support is needed most. In 2022 OY secured significant multi-year grants from the National Lottery Community Fund and the Prudence Trust. A Fundraising Manager was hired, a new CRM system implemented, and a corporate engagement strategy introduced.

During a critical period in 2022/23, we were without a Head of Finance, which posed challenges for conducting an external audit. Regrettably, this resulted in the audit extending beyond the filing deadline for the first time in the charity's history. We recognise this as an exceptional situation, and moving forward, our Head of Finance is implementing a robust system with regular internal audits to ensure timely preparation for future audits.

Oxfordshire Youth has a reserves strategy in place which aims to increase our reserves levels to £450,000 by 2026 with a stated aim of achieving long term financial security for the charity. Reserves are held to meet any unforeseen future expenditure or any future shortfalls in income. Whilst the contribution to the charity reserves for 2022-23 were not achieved, the strategic focus remains on achieving an increase in reserves each year, OY remains focused on increasing reserves as a priority for the next 3 years. We are also working with the wealth investment firm BGF on the reserves regeneration. A meticulous tracking system for expenditure, fund performance monitoring, contract compliance, and impact reporting now coordinate across teams.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Oxfordshire Youth works closely with 15 youth organisations in South Oxfordshire through our role as an infrastructure support organisation. Through our working partnerships and links with South Oxfordshire based youth clubs and organisations we understand that young people are experiencing heightened risk through economic disadvantage further compounded by greater rural isolation. We have used the intelligence and insights from these connections to inform our motivation and understanding of the need for these programmes. Firstly there is a deficit of Young Leaders initiatives in South Oxfordshire and other districts, highlighted in our 2021 Youth Services Study commissioned by Oxfordshire County Council.

This study also highlighted that leadership development programme along with increased mental health and wellbeing provision were in high demand. These insights have motivated Oxfordshire Youth to source funding to ensure young people in South Oxon have access to leadership opportunities. Through our consultation with the Sector for our annual Youth in Mind conference, reaching over 400 cross sector professionals, we understand that school transitions causes persistent challenges to young people's mental health and wellbeing which is correlated to Emotionally Based School Avoidance, a theme we have addressed through providing skills based workshops and training for the sector.

In Wallingford, in collaboration with local community groups and the Town and District councils, the team has supported the formation of a framework towards a expansion of youth services and has led local public engagement to nurture a new generation of volunteers. this group is known as 'OX10' and we will continue to work closely with them to take a flexible approach to addressing community need. We will work closely with our partner schools on the Transitions programme, continuing to build our relationships with the pastoral teams and SENCOs to ensure that the young people who need this programme most are accessing it and

that adaptations can be made to ensure we are addressing ongoing community needs. Most crucially, we are committed to 'youth Voice' which means we listen closely and consistently to the real life issues and concerns of young people engaged in both programmes, ensuring that sessions in schools and on the Young Leaders residential are tailored to effectively address these issues and concerns and needs.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Transitions: Since our last delivery of this programme in August 2023 we have returned to the schools we were working with previously to meet with the students who attended the weekly workshops and discuss their experiences supporting the new students. In these sessions we have asked them for their opinions on the content of the workshops and if it met their needs. We have also met with a group of Year 7 students to find out about their experience of making the transition to secondary school in September 2023 and the support they received from the Transition buddies. We have also interviewed two members of staff from the schools we have worked with to get their feedback on the programme and how they feel it has benefited the students in their school and assisted with the transition process.

The Transitions project involves a reflective piece with the young people which has been carried out after each cycle of the project, in this we have asked the young people to think about the workshops they attended and the transition process as a whole. Each year when this information was gathered we used this to inform the delivery of the following year's workshops. The information gathered was used to incorporate young people's views into the review / redesign of the next programme. Codesign is written into the programme itself and we follow a youth work approach within the context of the programme. It is imperative that we adapt to individual school's transition plans and approaches and while there are themes that are similar there are always themes that are specific to individual schools or year groups. At the beginning of the programme, the young people are asked to identify the issues that are most relevant to them and their peers. The issues identified by each group will inform the issue-based sessions we will run with the young people in each school during that programme.

Oxfordshire Youth consulted with Didcot Train about the delivery of the Transitions programme in schools. As a local organisation in SODC, Didcot Train is well equipped to support young people both during the project and beyond. We believe this partnership will provide the best support possible to young people in the longer term. Oxfordshire Youth will provide training to the staff from Didcot Train to directly deliver the workshop sessions. Through previous delivery of the Transitions programme we have developed the sessions year on year with feedback from the young people involved. This learning would be passed on to the staff involved and continuous support would be provided throughout the project to ensure the sessions are running smoothly.

For our Young Leaders programme, we have worked closely and consulted with Berry Youth Centre, Thame Youth Club and Chinnor to understand the needs of their communities and young people which has gone on to shape our sector support offer, for example helping Thame to develop a detached youth work offer.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Oxfordshire Youth implements its Equality, Diversity, and Inclusion (EDI) policy to ensure that our services and activities meet the needs of all users, especially vulnerable or priority groups. Here's an outline of how this is achieved:

- **Commitment to Equality and Non-Discrimination**
The organisation is committed to eliminating unlawful discrimination, promoting equal opportunities, and fostering good relations between individuals with different protected characteristics. These include, but are not limited to, age, gender, race, disability, religion, sexual orientation, and socio-economic status. This principle ensures that services are accessible to everyone, while recognising and addressing the unique challenges faced by vulnerable groups.
- **Identifying and Addressing Needs of Vulnerable Groups**
Services are designed with an understanding of the specific needs of vulnerable and priority groups. The organisation uses regular feedback and consultation processes, gathering input from service users and stakeholders, to continually assess how well its services meet the needs of these groups.
- **Inclusive Service Design**
The organisation makes a conscious effort to include considerations for accessibility and inclusivity

in the planning stages of any service or activity. For example, venues chosen for activities are fully accessible to people with physical disabilities. There is also an emphasis on making sure activities are designed to accommodate the various levels of ability or background that participants may have.

- **Training and Awareness**
All staff, volunteers, and trustees are provided with equality and diversity training. This training ensures that they are not only aware of their obligations under the law but are also sensitised to the challenges that individuals from vulnerable or marginalised groups might face when accessing services. This training is regularly updated to keep pace with best practice.
- **Monitoring and Evaluation**
The organisation has a robust monitoring and evaluation process that checks how well its services are meeting the needs of all users, particularly those from vulnerable or priority groups. Regular reports are compiled, and these include demographic data on who is accessing services. The data is used to identify any groups that may be underrepresented or not engaging fully with services, allowing the organisation to adapt and respond accordingly.
- **Inclusive Staff Recruitment**
Oxfordshire Youth aims to reflect the diversity of the communities it serves in its workforce. Recruitment practices are designed to be inclusive, with job advertisements placed in diverse media outlets to ensure they reach a broad audience. The organisation also provides equal opportunities in career development, ensuring that all staff, regardless of background, have access to training and progression.
- **Partnerships with Specialist Organisations**
To ensure that it meets the needs of priority groups, Oxfordshire Youth works in partnership with other organisations that have specialist knowledge of these groups. This allows for a more tailored approach in certain cases, ensuring that services are not only inclusive but also specifically designed to address the needs of vulnerable users.

By embedding these principles in its daily operations, Oxfordshire Youth ensures that its services are accessible, inclusive, and responsive to the needs of all users, including the most vulnerable.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To ensure we successfully meet the needs of all users, including vulnerable and priority groups, we will implement a comprehensive evaluation framework supported by our Research and Impact Manager that emphasises both quantitative and qualitative measures of impact.

Ultimately, through the Transitions and Young leaders programmes, we want to see a significant boost in the skills, connections, and resources available and accessible to disadvantaged young people aged 11-18 in South Oxfordshire. We will know we have been successful in meeting the needs of all users through positive engagement with both programmes, completion of qualifications and accreditations, feedback from users and relevant stakeholders demonstrating notable growth in core personal and social competencies, and crucially an increase in continued participation in positive community initiatives following on from the programmes. We will know this has been successful through follow up meetings with school, students and participating youth clubs both 6 months and 12 months post intervention.

Our Monitoring and Evaluation approach will encompass several key elements designed to assess effectiveness and drive continuous improvement.

Baseline Assessments: At the outset of our programs, we will conduct baseline assessments to identify the specific needs, challenges, and aspirations of our participants. This initial data will serve as a reference point for measuring progress and impact over time, enabling us to tailor our support to better address their unique circumstances, ultimately strengthening outcomes.

Regular Feedback Mechanisms: We will employ various methods, including surveys, focus groups, and one-on-one interviews, to gather insights from participants, parents/carers, and community stakeholders including participating schools and partner youth clubs and organisations. To ensure accessibility, we will offer multiple options for providing feedback, accommodating different communication styles and needs.

Outcome Measurement: We will develop clear, measurable outcomes aligned with our program goals. Key performance indicators (KPIs) will include improvements in leadership skills, increased engagement in

community activities, enhanced emotional well-being, and improved educational attainment among participants. For vulnerable groups, we will track specific indicators such as reductions in social isolation, and enhanced resilience. These outcomes will be evaluated pre and post the Transitions and Young Leaders interventions to monitor progress.

Tracking Progress: Regular check-ins with participants will help identify any challenges they may face, allowing us to adjust our support accordingly. This responsive approach ensures we remain attuned to the evolving needs of our participants, particularly those who may require additional assistance.

Success Stories and Case Studies: We will document success stories and case studies to illustrate the tangible impact of our programs on individuals and communities. These narratives will not only highlight positive outcomes but also provide a deeper understanding of the challenges faced by vulnerable groups and how our interventions are making a difference. Sharing these stories will also serve to inspire others and promote further investment in our initiatives.

Annual Reviews and Adjustments: Conducting annual reviews of our programs will be essential for assessing overall effectiveness. We will analyse both quantitative data and qualitative feedback to identify trends, successes, and areas for improvement.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

1,064

Please explain how you have determined the number of beneficiaries.

Transitions

This programme is impactful because of its capacity to reach and positively impact large numbers of young people. We will work intensively with 15 young people from Year 7 and year 8 in each of the four South Oxfordshire schools identified resulting in 60 young people gaining peer mentoring and leadership skills across the four schools. This cohort of young people will design and deliver transitions activities, including youth-led assemblies, which are delivered to Year 6s on Transition Days across the Summer Term and at the start of the new academic term to ensure that the incoming Year 7s are benefiting from continued support. We have based this number of 'Transition Buddies' on the successful delivery of the model across Oxfordshire over 3 years between 2019 and 2022.

These young people will attend 12 weekly workshops run in schools to develop confidence and leadership skills to assist with their development and their ability to effectively support the young students. Each cohort of Transition buddies will support the new cohort of students coming into the school which will potentially reach indirectly a further 992 students across the four schools. In total the Transitions project would reach 1064 students per year.

Young Leaders

The Young leaders programme supports 12 young people in each cohort, we will run one cohort per year making a total of 24 young people across the two years of the programme. We have based this number of young people on two factors; firstly demand for fully funded spaces from South Oxfordshire partners including Berry Youth Centre, Thame Youth Project, Sonning Common Youth Club, and Chinnor Youth Club. Secondly, the effective ratio of Oxfordshire Youth staff to match the level of needs of the young people who participate in the programme. As we are targeting young people who are experiencing multiple adversities and challenges, which may result in challenging behavioural and emotional issues, a staff to young person ratio of 4-1 enables us to ensure each young person has the dedicated support of a highly skilled and trained youth work practitioner throughout the Young Leaders programme.

In total the two programmes will reach 1064 young people per year

Please describe who will directly benefit from your services/activities.

Across the two programmes, 100% of the young people engaged in the intensive skills development programmes will be identified as priority groups.

We will use our robust referral form and process to ensure that young people recruited for the Young Leaders Programme will benefit from the intensive group work support and transformative Residential experience. We will work closely with our South Oxfordshire partners to ensure that the young people involved are suitable for the opportunity and whilst experiencing multiple vulnerabilities are willing and

motivated to engage in a youth work programme.

- Young Leaders
- Experiencing social isolation
- Experiencing adverse impact of rural isolation
- Poor Mental Health
- At risk of Not being in Education, Employment, or Training (NEET)
- Vulnerably housed
- Neuro-divergent
- Economically disadvantaged
- Educationally Disadvantaged

All young people recruited will experience a minimum of three of these vulnerabilities and this will be assessed as part of the referral process to ensure this programme is delivered to those in most critical need of intervention.

All young people referred form the core cohort of 15 young people at each school will experience a minimum of three vulnerabilities to ensure that this programme is reaching those most in need of leadership development. We have learned that one of the most impactful components of this programme is that the young people who become the 'Transition Buddies' and therefore take on a new leadership role within their school community are nominally the young people who do not recognise themselves as confident and with the capacity to influence change in their lives and wider community. Putting them in positions of responsibility and leadership within their school communities transforms their self-confidence and the way in which they perceive themselves and the wider school perceives them too.

- Transitions
- Poor Mental Health
- Educationally-disadvantaged
- SEN/Neurodivergent
- Poor mental health
- At risk of bullying and/or exclusion as a result of being from Black and Global Majority and/or Disabled/Neurodivergent communities

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Both Transitions and the Young Leaders programme are designed to upskill and empower young people from disadvantaged backgrounds who are at increased risk of poorer educational, employment and health outcomes. In the last 3 years, the National Youth Work Agency and U.K Youth have worked to produce research and evidence to demonstrate the economic value and return on investment for youth work interventions.

The Transitions Programme complements South Oxfordshire District Council's goals by supporting young people during the critical transition from primary to secondary school, reducing the likelihood of them needing future council services. It targets vulnerable groups, such as students with special educational needs (SEN), neurodiverse learners, and those from disadvantaged backgrounds, addressing key risk factors that often lead to reliance on mental health or school disengagement services.

By fostering peer-to-peer mentoring, leadership skills, and offering structured emotional and social support, the programme reduces social isolation, which is a significant challenge in rural areas like South Oxfordshire. Transition Buddies—trained Year 7 and Year 8 students—provide younger peers with reassurance and guidance, reducing the risk of bullying, loneliness, and exclusion. This early intervention helps to prevent future emotional or behavioural issues that could require council intervention.

The programmes also promote mental health and resilience. By equipping students with coping skills and emotional regulation strategies during this high-stress period, it complements public health initiatives aimed at improving youth wellbeing and reducing demand for mental health services.

Additionally, the programme develops leadership and community engagement through the training of Transition Buddies. These young leaders gain valuable skills that encourage responsibility and reduce the likelihood of disengagement from education or community life, thereby lowering the risk of antisocial behaviour or truancy.

Through the last post course survey for Transitions, the majority of students reported increased levels of confidence. 74% of students reported feeling more prepared for challenges that life might bring them, 69% had a greater understanding of their strengths and 77% reported increased likelihood of trying new things. 76% of students reported increased levels of resilience and coping skills.

Following the workshops young people also reported increased levels of connectedness. 80% of the students felt more positive towards people who were different to them, 71% felt a greater responsibility to their school community, and 63% felt more able to talk to someone they don't know. Significantly 65% of students said they are more ready to work with someone who has different opinions.

The Young Leaders programme equips young people at risk of poor employment and health outcomes with the practical skills needed to boost employability prospects, building confidence and competence to support young people to move confidently into adulthood whilst simultaneously engaging in positive social action in their community. These positive outcomes are reinforced by the testimonial letter of support we have provided by Berry Youth Centre attached to this bid. In summary, the programme aligns with council objectives by fostering resilience, building skills relevant to the workplace, reducing isolation, and enhancing mental health, ultimately decreasing the need for council-led youth interventions.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Transitions aims to achieve measurable outcomes aligned with South Oxfordshire District Council's focus on Thriving and Healthy Communities, the programme seeks to enhance emotional wellbeing, social connectedness, and leadership skills.

Key expected outcomes include:

Improved Mental Wellbeing: Targeting vulnerable groups, the programme will reduce anxiety and isolation through peer mentoring. Trained Year 7 and 8 Transition Buddies will provide emotional support to Year 6 students. Success is measured by 75% of participants reporting improved resilience and coping skills via post-programme surveys.

Enhanced Social Connectedness: By fostering peer relationships, especially for those moving from small rural schools to larger ones, the programme aims to reduce isolation and the risk of bullying. Feedback will be collected, aiming for 70% of participants to report stronger social connections and increased confidence in making friends.

Increased Confidence and Leadership Skills: Transition Buddies will develop leadership abilities, with an 80% target of these students reporting increased confidence by programme's end, measured through self-assessments and staff feedback.

Success will be assessed through quantitative and qualitative data, including surveys and regular follow-ups, ensuring the programme meets community needs and fosters thriving, resilient young people.

Young Leaders achievable and measurable outcomes include;
Increased confidence, resilience, teamworking and decision-making skills.
Increased numbers of young volunteers and they are more active and engaged in their communities e.g. running their youth club and supporting peers.

Marginalised young people are playing roles in the management of youth organisations countywide, including OY.

Young people are active in their communities and confident in voicing their opinions. Young people visit, support and represent youth groups county-wide, organise events, participate in OY's running and governance.

In our pre / post course surveys we will look at how they feel they are at: motivating and communicating with others, providing constructive feedback, delegating tasks to others, team working and decision making skills and their understanding of the skills and qualities required to be a leader.

Case Study:

XXXX started volunteering at North Leigh Youth Project in 2023. XXXX was keen to help with small tasks that required no leadership qualities and was incredibly nervous about undertaking anything more substantial or that involved interaction with others. Her self-esteem was very low and she was very unsure of herself, and wouldn't put herself forward to do things. As her compulsory volunteering was coming to a close she was offered a place on the Young Leaders Programme. During the programme, XXXX initially let others take the lead but, with support from staff, soon stepped up and led strongly and competently. She role modelled well to the younger participants, actively supported those who were less academic when they found the workshops challenging, and was direct and assertive when leading on activities. XXXX used the opportunity to reinvent herself, and demonstrated that she's a conscientious and considerate leader. XXXX decided to continue to volunteer with North Leigh Youth Club. Whilst the impact for XXXX has been substantial, the youth project and the wider community have also benefited hugely from her skills and experience.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Oxfordshire Youth believes that effective youth work can be a powerful catalyst of systems change. However, we know in order to achieve systemic change, we must centre cross sector partnership working to successfully achieve the vision of an equitable future where all children and young people have the skills, connections, and resources they need to thrive. We have a strong track record of partnership working, co-designing and co-delivering a range of services with and for the sector including our annual mental health conference 'Youth in Mind', the 'YPSA' which draws on local partnership and place-based expertise in the South. Previous successful models of delivery included 'The Mental Wealth Academy' which was informed by youth voice and local grassroots youth charities including those in South Oxon. This model was funded by central government for 3 years.

As an infrastructure organisation for the youth sector, we maintain and actively develop strategic collaborations that enhance service delivery, and create comprehensive support networks for young people and skills development opportunities for the youth workers and services that support them. From 2022 to 2024 we have provided support and hold strong relationships (active engagement and event attendance) with 15 South Oxfordshire based/geographic focus youth organisations through our Changemaker Network. We have previously, to great success, delivered Transitions with partner organisation Didcot Train, and in the last 5 years have successfully delivered the Young Leaders programme to 22 young people from South Oxon.

The needs of young people in South Oxfordshire are diverse and encompass several key areas that have been shared by the CMN organisations with Oxfordshire Youth through annual surveys, the Children and Young People's Forum, and more recently through our intensive engagement with 'OX10' a community group we have supported, attended by cross sector stakeholders who were and are passionate about improving youth services and youth outcomes for OX10 young people. The issues which have helped us inform the need for these programmes include;

- Mental Health Support - Increased access to mental health resources and services.
- Social Connection - Opportunities to build friendships and community ties.
- Skill Development - Workshops focusing on practical skills and personal development.
- Employment Opportunities - Guidance on job readiness, internships, and career planning.

We have existing, and are building new relationships with local businesses so that we can address the deficit in social capital for young people from economically and educationally disadvantaged backgrounds. For example, we are currently working with businesses based in the South including Lucy Electric in Thame who are providing work experience opportunities, employability skills workshops delivered by business professionals for vulnerably housed youngpeople. We will work with our local partners to broker direct relationships with these businesses.

Our partnership approach for these programmes will be underpinned by clear governance, regular partnership review meetings, shared objective setting, clear roles and responsibilities and documented partnership agreements

To embed Quality Assurance we will implement with our names South Oxon partners the following; Joint monitoring and evaluation, regular impact assessment, shared learning processes, and continuous improvement frameworks

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Our contract to deliver the Young People's Supported Accommodation Service (YPSA) has elevated us beyond the income threshold set by many of our long-term funders for children and young people. Unfortunately, this has hindered our ability to deliver vital partnership and place-based programs that are crucial for the health and well-being of our community's youth. We are therefore excited about the opportunity to collaborate with South Oxfordshire District Council (SODC), which does not impose an income threshold barrier. This collaboration will enable us to effectively partner with local youth organizations and generate two years' worth of impactful evidence for interventions specifically targeting young people in rural areas who face lower well-being, economic challenges, and educational disadvantages.

Our commitment goes beyond merely delivering programs; we want to ensure that this initiative also enhances the financial sustainability of our grassroots partners in South Oxfordshire. By sharing the evidence and impact of our work, we aim to strengthen their funding applications, boosting their profiles and credibility within the community.

To sustain and develop our initiatives across South Oxfordshire, we will ensure the Business Guardian programme positive impacts the young People participating on the Young Leaders programme. We will actively pursue partnerships with local businesses who can offer work placements to these young people following completion of their Young Leaders qualification. By leveraging their resources and networks, we can amplify our impact, young people's social capital, and create a more interconnected and long term support system for youth in the area.

To mitigate reliance on a single funding stream, we will explore a variety of financial support avenues. The evidence we gather from our programs will empower us to apply for funding from local and national grant-making bodies. Additionally, we will cultivate relationships with our growing network of corporate partners who are focused on youth development and community engagement.

A robust evaluation framework will be essential to regularly assess the impact of our programs. By collecting and analysing feedback from participants and stakeholders, we can adapt our offerings to meet emerging needs and ensure that our services remain relevant and appealing to funders. This commitment to continuous improvement will not only enhance our programs but also demonstrate our effectiveness to potential supporters.

Engaging the local community in our planning processes is critical for raising awareness of our programs. We will host community forums via the OX10 network and our business networks on Harwell Campus via our long term supporter 'ARC Oxford' to encourage local investment and participation, fostering a strong sense of ownership among residents and businesses.

Through the implementation of these strategies, alongside our place-based partners, we aim to transform these programs into sustainable initiatives that support the ongoing personal skills development and growth of young people in South Oxfordshire, ultimately contributing to the strengthening of healthy and thriving communities.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We also continue to list the actions we take (or intend to take when needed) in relation to the policy and process. We want to significantly advance our efforts beyond policy, by producing an annual action plan that reviews achievements and builds on them, by making year on year improvements. We would encourage staff to feed into this to ensure we have an inclusive and supportive organisation that takes everybody's input seriously.

These are the actions we currently take:

- Recycling
Glass, plastic, carrier bags, aluminium foil, material, card and paper; printer cartridges
Disposal of laptop batteries and fluorescent tube lighting safely via local civic amenity and recycling facility
- Travel
Assessment of whether journeys can be taken by public transport – our choice is always to take the train, Oxford Tube or Oxford bus services as far as possible. Car sharing if possible
- Environmental Conservation
- Turn off PC and screen at end of the working day; electrical appliances checked and tested

annually; don't leave taps running or dripping

- No printing off of emails or other e-items unless absolutely necessary
- Turn off office lights whenever not in the room.

Wallingford Family Centre	Ref: SRev25-27/20
Financial Review	
<p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p>	
<p>Please be aware our figures are from June - July for charity commission, as requested these have been adjusted for the financial year and input into requested spreadsheets. This will create a discrepancy with our charity commissions submissions.</p>	
<p>Requested grant will cover 52% of staff costs for management, administration, and a fundraising coordinator, equating to £33,260 in 2025/26 and £33,260 in 2026/27 annually. The shortfall over the two-year period will mainly be covered by our stable income sources, primarily derived from a grant provided by our main funder, alongside income from room hire.</p>	
<p>Currently, we also have £4512 earmarked for project-specific funding. However, even with this support, if we are awarded the requested funding of £16,000 per year, totalling £32,000 over the two-year period, we anticipate a small shortfall of £4,700 for the entire service delivery. Despite this, we are confident that the shortfall can be addressed through donations and fundraising efforts. Historical data suggests that meeting this target is achievable.</p>	
<p>As a contingency plan to ensure the project's continuity, we have identified several strategies to bridge the gap and maintain financial sustainability:</p>	
<p>We plan to seek alternative funding sources by applying for grants from other organisations, exploring local government funding opportunities, and pursuing private sector sponsorships. Additionally, we aim to collaborate with charities, businesses, and organisations whose mission and values align with ours, potentially leading to sponsorships or other forms of financial support.</p>	
<p>To reduce reliance on cash, we will seek additional volunteer support and donated materials. This approach will help us reallocate funds to critical areas of the project, enabling us to maintain services without straining our financial resources. By fostering relationships with community members and local businesses, we aim to secure resources that will enhance service delivery.</p>	
<p>We have contingency and reserve funds in place to cover any immediate financial gaps. These reserves serve as a financial safety net, allowing project activities to continue uninterrupted while we secure additional funding.</p>	
<p>By implementing these strategies, we are confident that any financial challenges will be effectively addressed, ensuring that the project maintains its momentum and impact.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p>	
<p>The Fundraising Coordinator will play a crucial role in ensuring the financial stability of our organisation. Their responsibilities include:</p>	
<p>Researching and Securing Funding</p>	
<p>Identify, research, and apply for grants from local foundations, government programs, and other sources. Develop relationships with potential corporate sponsors, and secure both financial support and donations. Create and execute individual donor strategies, including personal outreach, appeals, and cultivating recurring donations.</p>	
<p>Planning and Executing Fundraising Events</p>	
<p>Organise and manage small scale fundraising events. Co-ordinate logistics, promotion, and volunteer management for these events to ensure their success.</p>	
<p>Utilising Donor Data</p>	

Implement and maintain a donor management system to track contributions, analyse giving patterns, and segment outreach efforts.

Cultivating and Nurturing Donor Relationships

Forming and Managing Partnerships

Develop partnerships with local businesses and community organisations, securing ongoing support through sponsorships, and collaborative events.

Technology

Use affordable online donation platforms to make giving easier for donors and to track fundraising progress. Manage email marketing campaigns and social media outreach to keep donors engaged and informed about ongoing initiatives and opportunities to support.

The Fundraising Coordinator will be key to ensuring the success of our fundraising efforts, diversifying our revenue streams, and helping build a sustainable financial foundation for the organisation.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Lack of In-Person Events and More Than 75% Reduction in Donations

Our family centre depends heavily on in-person events, such as community workshops and family programs, to connect with donors and raise critical funds. Due to COVID-19 restrictions, these events were either cancelled or moved online, leading to a drastic drop in donations. Donations declined by more than 75%, significantly reducing our ability to sustain operations. Without in-person interaction and a struggling community, our typical avenues for donor engagement became less effective.

Inability to Run Fundraisers

Inability to provide large fundraising events and other community-driven activities, to generate a portion of our revenue. The pandemic forced the cancellation of all these in-person fundraisers, cutting off this vital income stream. The inability to hold these fundraisers left a gap in our funding.

More than 36% Reduction in Grant Funding

Grant funding is a critical source of income for our centre, supporting various programs and services we offer to families. Unfortunately, during the pandemic, grant revenue decreased by more than 36%. This reduction in grant funding further deepened the financial challenges we faced.

45% Decline in Room Hire Revenue

Room hire is another important revenue stream for our family centre, as we rent out our spaces for community events, meetings, and gatherings. However, due to COVID-19 restrictions, there was a 45% decrease in room hire revenue. With fewer groups able to host in-person meetings or events, this stream of income sharply declined, further compounding the financial strain on the centre.

Impact of Rising Cost of Living

In addition to the direct effects of the pandemic, the rising cost of living has further strained our financial resources. Many of our community members, who once contributed regularly, have been forced to cut back on charitable donations due to increasing household expenses like rent, utilities, and food. The overall cost of operating the centre, including utility bills, maintenance, and staff wages, has also risen, putting additional pressure on our already limited budget. We have also seen an increase in usage of services.

Challenges with Collaboration

Our ability to collaborate with other community organisations and partners was also significantly hindered. These partnerships typically allow us to share resources, costs, and deliver joint programs that benefit the families we serve. However, due to social distancing measures and restrictions on in-person gatherings, many of these collaborative efforts were scaled back or halted, reducing our ability to operate efficiently and

serve the community as effectively as before.

The financial impact of the pandemic on our family centre was profound. With donations dropping by more than 75%, grant funding reduced by over 36%, room hire revenue falling by 45%, and the inability to hold in-person fundraisers, our financial situation became precarious. Additionally, the rising cost of living has compounded these challenges, affecting both our donors' ability to give and increasing our operational costs, making it even harder to continue serving our community.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Our service is highly utilised, with 781 families registered across South Oxfordshire, including Wallingford, Didcot, Cholsey, Benson, and Berinsfield. We deliver programs that address local challenges such as child poverty, educational inequalities, and mental health, based on need. We hold regular strategic meetings, gather data, and consult with our users to adapt our services to meet community needs.

Early years education is crucial, with 90% of brain development occurring by age five. However, South Oxfordshire has seen substantial cuts to early childhood services, especially after the closure of over 40 children's centres in 2017 (Oxfordshire County Council). This has left low-income families with limited access to early support. Our baby and toddler groups aims to fill this gap, promoting school readiness and reducing developmental delays. This service is especially important in local areas, with local towns ranking within the 40% most deprived for education and skills (JSNA 2021).

In parts of Wallingford and Cholsey, over 20% of children live in poverty after housing costs (End Child Poverty Coalition), leaving families struggling to afford basic necessities. Our swap shops provide clothing, toys, and essential items for free, reducing financial pressure on families. These events promote sustainability and build community connections. By offering resources in a stigma free environment, we give families facing hardship a dignified solution to meet their needs.

Parents and guardians, especially in low-income families, face increasing mental health challenges due to the pressures of caregiving, financial stress, and social isolation. A 2021 Mental Health Foundation study found that 74% of parents felt overwhelmed during the pandemic. Our wellbeing sessions provide emotional support and stress relief activities for parents and guardians, helping them build resilience and reduce burnout. Given the long waiting times for mental health services in South Oxfordshire, these sessions offer a much-needed early intervention, preventing long term mental health problems.

Food insecurity is a growing problem in South Oxfordshire, where 12% of children live in poverty after housing costs (End Child Poverty Coalition). Rising living costs further strain family budgets, leaving many unable to afford nutritious food. Our food surplus distribution program, in partnership with local supermarkets and community groups, provides nutritious, free food to struggling families. This initiative not only reduces food waste but ensures vulnerable children receive the nutrition they need.

Educational attainment gaps remain a pressing issue in South Oxfordshire, particularly in areas like Wallingford and Didcot. Our afterschool tuition program focuses on literacy and numeracy, providing targeted support to disadvantaged children. Studies show that children from low-income backgrounds perform 10% worse in standardised tests than their wealthier peers (Public Health Oxfordshire). By closing this attainment gap, we improve long-term educational outcomes for these children.

A family centre adopts a flexible approach by tailoring sessions and resources to both community and individual needs. It regularly adapts its services based on usage patterns and feedback, ensuring it meets the evolving requirements of families and the wider community effectively.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We ensure that our services are shaped by the needs of the community, with a focus on vulnerable and priority groups. This is achieved through active consultation with service users, stakeholders, parent trustees, and professional partners, allowing us to continuously adapt and improve our offerings.

Service User Consultation and Co-Design

We actively seek feedback through surveys and one-to-one conversations to understand the needs and challenges faced by the community. All new users receive a feedback form after their initial contact with the centre, which helps us tailor our services accordingly.

Key examples of community driven programs include

- Special Educational Needs (SEN) sessions, initiated in response to families struggling with SEN challenges.
- The Swap Shop, an initiative proposed by a parent, XXXX, who sought support.
- Food support initiatives, which were developed after noticing the strain on local food banks.
- Our Baby Group was expanded from one to two sessions due to its growing popularity and demand from families.

Stakeholder and Partner Collaboration

We maintain strong relationships with key community stakeholders by hosting regular meetings with local schools, the Locality and Community Support Service (LCSS), parent trustees, and professionals at our centre. We also house the midwives, who provide critical services, and health visitors run courses on site, ensuring families have access to essential healthcare support.

This collaboration allows us to:

- plan services that align with community needs.
- engage in joint initiatives like afterschool tuition, which local schools refer families to.
- participate in community events alongside other organisations to better support vulnerable families.

Involvement and Empowerment of Vulnerable Groups

We actively reach out to low-income families and those with children with special educational needs to ensure their specific needs are addressed. By involving these families in decision making processes, including parent trustees, we empower them to have a voice in shaping the services they rely on.

Ongoing Improvement and Volunteer Engagement

We regularly review and refine our services based on ongoing feedback to ensure we continue meeting the evolving needs of the community. Many of our volunteers continue to be service users. In the past, we have worked with a wide range of partners to extend the reach and impact of our services.

These partners include:

- Health Visitors
- Dolphin
- Window on Wallingford
- RefreshPro
- Cholsey and Wallingford Railway
- Midwifery Team
- Wallingford Medical Practice
- LCSS – (Local Community Support Services)
- Wild About Wallingford
- Wallingford Foodbank
- Didcot Foodbank
- CAB (Citizens Advice Bureau)
- Ridgeway Church
- Rainbow Preschool
- Paddocks Preschool
- Wallingford School
- SODC - Active
- OCC – RealPlay
- Lidl, M & S, Sainsbury's
- The Village Midwife
- Swaps4All
- Community Fridge
- OPA (Oxfordshire Play Association)
- CAP (Christians Against Poverty)

- Swings & Smiles
- AV Events
- Wallingford Radio
- Floistic
- SOFEA
- PPG
- OX10 Community
- Oxfordshire Youth
- First Aid Matters
- Runwise
- Library
- Coffee Stop
- TRAIN
- James Rymans Carpentry
- DG Fencing
- Hasbro

Through consultation, collaboration, and empowerment, Wigod Way Wallingford Family Centre, with the support of parent trustees, professional partners, and local organisations, remains responsive and inclusive, continually adapting to the needs of the community.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

The Wigod Way Wallingford Family Centre adopted its policy on promoting inclusion, equality, and valuing diversity in January 2018, with an update in March 2024. This policy is vital for creating an environment where all users, including vulnerable and priority groups, receive equitable and inclusive service.

Here's how the policy will be effectively implemented:

Mandatory Training: All staff, regardless of their role or tenure, must complete mandatory training on inclusion, equality, and diversity.

Ongoing Education: Regular refresher courses and updates will be provided to keep staff informed about new developments in anti-discriminatory practices and legislation. This ensures that knowledge and skills are kept current and relevant.

Environmental Adaptation: The Centre will ensure that its physical and educational environments reflect and celebrate diversity. This includes displaying materials and resources that represent various cultures, abilities, and backgrounds. For instance, inclusive toys, and accessible facilities will be made available.

Activity Programming: Activities will be designed to be inclusive of all children, taking into account special educational needs and cultural backgrounds. This includes offering adaptable activities that accommodate diverse styles and physical abilities and celebrating a range of cultural events and practices.

Community Engagement: The Centre will actively engage with the local community to foster cohesion and understanding. This involves organising content that celebrate diversity, encouraging parental involvement.

Recruitment: Staff, Trustee & Volunteer recruitment practices will aim to reflect the diversity of the community served.

Empowering Staff: Staff will be trained to confidently challenge discriminatory behaviour and practice. This includes providing support for staff who encounter or witness discrimination and ensuring that they have clear procedures for reporting and addressing such issues.

Regular Audits: The Centre will conduct regular audits to review its practices and ensure they align with the policy's objectives. This includes assessing service delivery, resources, and support systems to identify and address any gaps in inclusion or equality.

Adherence to Legislation: The Centre will ensure compliance with relevant legislation, including the Equality Act 2010 and the Disability Equality Duty 2011. This involves making reasonable adjustments to accommodate individuals with disabilities and ensuring that all services are accessible.

Safeguarding: Robust safeguarding procedures will be in place to protect all users, particularly those from

vulnerable groups. This includes training staff to recognise and address potential risks, ensuring that the Centre remains a safe and supportive environment.

Wigod Way Wallingford Family Centre aims to create an environment that truly embodies its commitment to inclusion, equality, and diversity, ensuring that all individuals, especially those from vulnerable or priority groups, receive fair and respectful treatment.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To measure our success in supporting vulnerable and priority groups, including families with special educational needs (SEN), we have employed key indicators such as attendance, feedback, usage, and support.

Attendance

Attendance at our provision has been a significant indicator of engagement. We have observed steady growth in the number of families participating in our activities. The regular return of these families demonstrates that our services are accessible and valued. Many families have also attended multiple sessions, indicating that our services meet their ongoing and evolving needs. This steady involvement shows that we are successfully providing relevant, much-needed support to this community.

Feedback

Feedback is crucial in helping us understand whether our services meet the needs of vulnerable families. We regularly collect feedback through surveys and on one-to-one basis, ensuring that participants can share their thoughts on the effectiveness of our services. Families have shared positive experiences, particularly in how our services provide practical and emotional support. Many have expressed appreciation for the welcoming environment and the tailored nature of our programs. In addition to positive feedback, we encourage families to offer suggestions for improvement. This has allowed us to refine and adjust our services to better meet their needs.

In particular, we developed and distributed a specific feedback form for SEN families attending our sessions. Based on this feedback, we have made important updates to our processes, such as adjusting session formats to better accommodate individuals and offering additional resources for families who need further assistance.

Usage

Another important measure of success is the utilisation of our services. We closely track the usage of key resources such as financial assistance, educational support, and food programs. The high demand for these services demonstrates their value to families, particularly those in vulnerable or priority groups. The increased use of these resources highlights that our services are not only necessary but also effective in meeting the unique needs of the families we serve.

Support

Support from the broader community, including volunteers, donors, and partner organisations, is another key indicator of success. We have fostered strong relationships with local schools, SEN advocacy groups, and other charitable organisations, which has led to greater collaboration and resource-sharing. These partnerships have allowed us to enhance the services we offer and reach a broader audience, ensuring that families receive comprehensive support. Additionally, the continued involvement of volunteers and donors demonstrates the community's confidence in the impact of our work.

Furthermore, the retention rate of families using our services over the long term shows that we are building strong, trusting relationships. Families not only return for continued support but also recommend our services to others, a clear indication that we are addressing their needs effectively.

By measuring success through attendance, feedback, usage, and support, we have gathered strong evidence that our services are making a positive impact on vulnerable and priority groups, including SEN families. The feedback we collect helps us continually refine our offerings, ensuring that our programs remain relevant and inclusive.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

2,708

Please explain how you have determined the number of beneficiaries.

Currently the service benefits approximately 2,708 individuals, including 781 registered adults, 877 children, this doesn't include users of Swap Shop, and 1,050 midwives' appointments. This number is expected to increase as more people register and attend. Additionally, the figures don't reflect the indirect benefits to extended families and the wider community, who also gain from the services provided. While 2708 represents the direct impact, the true reach is likely much larger, given future growth and the broader community benefit from resources, information, and support shared among families and local networks.

Please describe who will directly benefit from your services/activities.

We play a vital role in supporting a large number of 'vulnerable' / priority groups can including isolated young families, economically-disadvantaged, homeless, educationally-disadvantaged, migrant groups, individuals with disabilities, and those with impairments. Offering inclusive, accessible resources to enhance their wellbeing, development, and social inclusion. Here's how each service supports these groups:

Baby & Toddler Sessions

These sessions are a lifeline for isolated young families, economically disadvantaged parents, migrant groups & families with children with disabilities. They provide a nurturing environment where parents can bond with their infants while receiving expert advice on child development. This is particularly valuable for families who may lack access to parenting resources or community support, helping reduce stress and foster healthy parent-child relationships.

Families receive early development support and engage in social interaction, ensuring they have equal access to stimulating environments, despite their family's economic or social challenges.

SEN Support Sessions

Children with Special Educational Needs (SEN) or disabilities benefit from tailored session designed to meet their unique developmental needs. These sessions provide inclusive play opportunities in a safe environment, while families receive much-needed support and guidance.

Community Exchange

Supports all including low income households, homeless and migrant groups by allowing them to exchange essential items like toys, clothing, and household goods. This service helps ease financial strain and promotes sustainability within the community, particularly for families who may struggle to afford necessities.

Wellbeing Sessions

Parents, from vulnerable backgrounds are able attend these sessions free of charge, benefiting from these sessions, which focus on mental health, mindfulness, and stress management. For those facing isolation or financial hardship, these sessions provide emotional support, helping them manage stress, reduce anxiety, and improve their overall wellbeing.

Holiday Provision

These programs provide safe, structured activities for children from economically disadvantaged families and migrant communities during school breaks. By offering a free access to holiday activities, these sessions ensure that children from all backgrounds can engage in enriching activities while reducing the financial burden on their parents.

Surplus Food Distribution

Low-income families, homeless individuals, and those facing food insecurity benefit from the distribution of surplus food. This program helps address basic nutritional needs, reducing hunger and ensuring that vulnerable families have access to healthy meals, particularly those who struggle financially.

Swap Shop

The Swap Shop provides an opportunity for all including economically disadvantaged families and migrant

groups to access clothing and essential items at no cost. This service helps reduce financial strain and promotes community solidarity through shared resources.

After School Tuition

This service supports children from educationally disadvantaged and minority backgrounds by offering additional academic assistance. The tuition helps close educational gaps for children who may struggle in school, providing affordable or free access to learning support that enhances their academic performance and future opportunities.

In summary, your services are designed to meet the needs of all including vulnerable and minority groups, ensuring they receive the resources, support, and opportunities required to thrive in their communities.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The services and activities for which we are requesting funding complement council services in several ways, offering proactive and preventive support that indirectly reduces the likelihood of individuals needing more extensive or long-term council intervention.

Early Intervention and Family Support

Our Baby and Toddler Sessions offer new parents and caregivers the guidance, social interaction, and early childhood development support they need. By equipping families with the knowledge and resources to foster healthy child development, we reduce the need for future social services intervention related to child welfare. Early education and socialisation also contribute to better school readiness, reducing the burden on educational support services.

Support for Special Educational Needs (SEN)

The SEN Support Sessions directly complement the council's educational and social care services by providing early and targeted interventions for children with special educational needs. These tailored sessions help children with additional needs alleviating the pressure on council provided SEN resources. By fostering development early on, we aim to reduce the long-term need for intensive council services and specialist educational placements.

Reducing Financial Strain on Vulnerable Families

Our Community Exchange and Swap Shop helps families, particularly those facing economic hardship, access essential items like clothing and toys for free. This reduces the need for financial assistance programs offered by the council and supports low-income families in meeting basic needs, preventing situations where families might require more extensive social services support.

Mental Health and Wellbeing Support

Our Wellbeing Sessions, which focus on mindfulness, stress reduction, and emotional support, help alleviate mental health challenges that may otherwise escalate into more serious issues requiring council intervention. By offering early mental health support to parents, caregivers, and individuals, we reduce the likelihood of individuals needing long-term mental health services, which are often oversubscribed and costly for councils to maintain.

Reducing Food Insecurity

Our Surplus Food Distribution addresses food insecurity within the community, particularly among low-income households. By providing families with access to nutritious food, we reduce the need for emergency council services or financial support related to food poverty and hunger.

Holiday Provision and After School Support

By offering Holiday events and After School Tuition, we provide children with safe, structured activities and academic support outside of regular school hours. Ensures that children are engaged in positive activities and supporting their academic journey.

In summary, our services not only complement but also enhance the effectiveness of existing council

services by providing preventive and early intervention support. This reduces the need for more intensive and costly council interventions in the future, benefiting both the community and the council's resources.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our services foster thriving and healthy communities by addressing mental wellbeing, physical health, and social inclusion. They provide vital support for vulnerable families, improve access to support, and promote sustainability, all aligned with SODC's Corporate Plan themes, particularly in building resilient communities that are healthy, active, and environmentally conscious.

Support Sessions

Alignment: Programs focus on increasing social interaction and emotional support for parents and young children. They promote mental wellbeing, parental confidence, and healthy child development through bonding and peer support.

Outcome: Increased emotional resilience for both parents and children, contributing to healthier, more connected communities.

Outdoor Explorers

Alignment: This activity promotes physical activity and fosters a connection with nature. Outdoor play supports children's physical health and mental wellbeing, offering families opportunities to engage with their environment while promoting active lifestyles.

Outcome: Improved physical health for children and increased awareness of nature, contributing to both personal wellbeing and stronger community connections.

Outdoor Explorers

Alignment: By connecting children with nature, this program cultivates environmental awareness and encourages the next generation to value and protect natural spaces.

Outcome: Greater understanding and appreciation of the environment, supporting the long-term health of local eco-systems

Mum and Baby Yoga

Alignment: Promoting physical activity and mindfulness for mothers, this program reduces stress and enhances both mental and physical health. The mother & baby bonding during yoga fosters emotional wellbeing and positive relationships, strengthening family units.

Outcome: Improved mental and physical wellbeing for mothers and enhanced maternal confidence, contributing to family health and stability.

SEN Sessions

Alignment: A safe and inclusive environment for children with special educational needs (SEN) ensures access to community activities. These sessions promote social inclusion.

Outcome: Enhanced confidence and social integration for families with children with SEN, contributing to a more inclusive, supportive community.

Mrs. B's Brain Boost Sessions

Alignment: Sessions prevent educational disadvantage by offering cognitive and academic support to children from disadvantaged families. By improving educational outcomes, they help break cycles of disadvantage, contributing to long-term community wellbeing.

Outcome: Increased academic success and confidence in children, helping build a more educated and resilient future generation.

Swap Shop, Community Exchange, and Food Distribution

Alignment: These initiatives reduce financial strain for low-income families by providing access to essential resources like clothes and food, addressing socioeconomic inequalities and fostering community support.

Outcome: Reduced financial pressure on families and stronger community networks through shared resources.

Alignment: These programs contribute to a circular economy by encouraging the reuse of clothing and household items, reducing waste, and supporting sustainability.

Outcome: Reduced environmental impact and increased community engagement in sustainability.

Christmas Present Distribution

Alignment: Providing gifts to families who might otherwise struggle ensures all families can participate in the holiday season with dignity, reducing emotional and financial burdens.

Outcome: Increased mental wellbeing and reduced financial stress during the holiday season.

Our activities support SODC's goal of creating thriving and healthy communities by promoting physical and mental wellbeing, enhancing social cohesion, and reducing inequalities. These initiatives foster a healthier, more resilient population by engaging families, children, and vulnerable individuals.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

We prioritise building strong partnerships across various sectors to ensure that our services and activities are designed and delivered effectively to benefit the local community. Below are examples of how we work in collaboration with key partners:

Partnership with Rainbow Preschool

Our collaboration with Rainbow Preschool ensures that families of preschool-aged children have access to essential resources. Rainbow Preschool plays a role in our food distribution program, helping us provide timely support to families in need. This partnership enables us to reach some of the most vulnerable members of the community.

Partnerships for After-School Provision

We collaborate with St. Nicholas Infants, Fir Tree, Brightwell and St. John's schools to offer after-school programs to those in need, that enhance students' educational experiences. These partnerships ensure our services align with school curriculum and provide safe, enriching environments for learning and personal growth after school hours.

Mrs. B's Brain Boost

In partnership with Mrs. B., we offer the "Brain Boost" program, promoting cognitive development through fun and engaging activities. This initiative supports our goal of fostering educational achievement and creating an enjoyable learning environment for children.

First Aid Matters: Family First Aid for Free

Through our partnership with First Aid Matters, we provide free family first-aid courses, empowering families with essential first-aid skills. This collaboration helps promote community safety and health by ensuring families are prepared for emergencies.

Sally Pregnancy Yoga

Sally offers affordable pregnancy yoga classes that promote physical and mental well-being for expectant mothers. Our partnership ensures these classes are accessible to all, supporting women in staying active,

managing stress, and preparing for childbirth.

NHS Oxford: Development of Healthier Together Website and App

Our collaboration with NHS Oxford was instrumental in the development of the Healthier Together website and app, which provides reliable health advice for families and children. This partnership ensures families have access to accurate information and reinforces our commitment to community health.

Wallingford Library

Our partnership with Wallingford Library provides additional educational resources and community-based events that enrich learning opportunities for all age groups. Together, we promote literacy, education, and cultural engagement within the local community.

Wild About Wallingford

We collaborate with Wild About Wallingford, an eco-focused charity that promotes nature conservation and environmental awareness. This partnership helps engage the community in sustainability initiatives and fosters a deeper connection with the natural world.

Through these partnerships, we demonstrate our strong commitment to working collaboratively with local organisations, schools, and public services. These collaborations enhance our ability to deliver comprehensive, community-focused services, promoting health, education, and well-being across the local area.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

To ensure the continued growth and financial sustainability of our services, we plan to take a collaborative, multi-faceted approach. Below are key strategies for working with partners to strengthen our services and secure a stable financial future.

Collaborating with Local Businesses and Corporate Sponsorships

Developing partnerships with local businesses for sponsorships or donations is key to financial sustainability. Businesses can support specific programs, such as sponsoring events, providing supplies for family support services, or co-funding new projects. In exchange, we can offer businesses visibility and recognition within the community, making it a mutually beneficial relationship. Seeking long-term corporate sponsors for initiatives like after-school programs will be a priority.

Diversifying Income Streams Through Grant Applications

We plan to work closely with our partners to apply for a wider range of local, national, and even international grants. For example, applying for joint grants with Wild About Wallingford for eco-education programs could unlock additional funding.

Expanding Fee-Based Services

While maintaining a commitment to accessibility, we plan to expand low-cost, fee-based services that can generate income. Services like Yoga or specialised family support programs could be offered on a sliding scale, ensuring affordability for those in need while generating revenue from others who can pay. This approach allows us to reinvest back into free or subsidised services for low-income families.

Community Fundraising and Crowdfunding

We will increase efforts to engage the local community through fundraising events, donation drives, and online crowdfunding campaigns. Collaborating with partners will help us reach a broader audience and attract more support. Local events such as sponsored walks, family days, or charity auctions could provide new funding opportunities while also raising our profile within the community.

Social Enterprise Initiatives

We will explore launching social enterprises to generate sustainable income. Revenue from these ventures can be reinvested into the charity, creating a long-term financial model that supports our community services.

By focusing on collaboration, diversifying income streams, and engaging the community, we aim to build a financially sustainable future while continuing to meet the needs of those we serve.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Our organisation has taken several steps towards decarbonising our operations and promoting nature recovery, aligning with the South Oxfordshire District Council Corporate Plan, "Action on climate change and nature recovery." Below are the key initiatives we have implemented:

- **Sustainable Transportation**
We actively promote eco-friendly transportation by encouraging walking, cycling, and the use of public transportation. Fostering these sustainable commuting methods, we aim to significantly reduce carbon emissions associated with travel, contributing to the decarbonisation of our operations.
- **Promoting Nature Recovery**
Our efforts to support nature recovery focus on enhancing local biodiversity and reducing waste through a circular economy approach.
- **Biodiversity Projects**
In collaboration with local environmental organisations, we are restoring nearby habitats to boost biodiversity. Our onsite green spaces feature pollinator friendly gardens and natural areas designed to support local wildlife, contributing to ecosystem recovery and providing vital resources for pollinators.
- **Waste Reduction and Circular Economy**
We are committed to reducing waste. We minimise landfill contributions by actively recycling and reusing materials. We've drastically reduced our reliance on single use plastics, replacing them with sustainable alternatives.
- **Outdoor Explorers Session – Educational and Community Engagement**
Our "Outdoor Explorers" sessions aim to educate participants on sustainability, nature conservation, and practical steps to reduce their environmental impact.
- **Swap Shop and Community Exchange**
We organise events that encourage participants to bring unused clothes, books, and household items for exchange. This promotes reuse, reduces waste, and reinforces the principles of a circular economy.
- **Recycle Bin for Clothes**
We have introduced dedicated clothing recycling bins to encourage textile recycling and reduce the environmental impact of fast fashion.

Steps We've Taken: Reduce, Reuse, and Recycle

- **Reduce**
We have begun to transition to paperless operations by adopting digital processes, which significantly minimise the need for printed materials and cuts down on paper waste. Additionally, we promote creative recycling by encouraging participants to engage in crafts made from recycled materials.
- **Reuse**
We prioritise refurbishing and reusing office furniture, equipment, and supplies, thereby extending their lifecycle and reducing the need for new purchases. Our community exchange programs, such as swap shops, allows community members to donate and swap items, fostering a culture of reuse and resource conservation.
- **Recycle**

We've implemented a comprehensive recycling program with bins for paper, plastic, metal, and textiles available throughout our facilities. This ensures that materials are recycled responsibly. Our clothing recycling initiative has been particularly successful in reducing landfill waste by encouraging the recycling of textiles and supporting the circular economy.

These initiatives demonstrate our commitment to tackling the climate emergency and promoting nature recovery. We continue to explore ways to further reduce our environmental footprint and contribute to sustainable, long term ecological restoration.

Didcot TRAIN - Inspiring Young People	Ref: SRev25-27/46
<p>Financial Review</p>	
<p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p> <p>N/A we intend to cover costs through our varied fundraising streams.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p> <p>We have demonstrated good income diversification and growth to date. We recently appointed a CEO who is a qualified fundraiser, and we have also strengthened the fundraising expertise on our board. We have invested this year in a contract with a fundraising agency that is helping us diversify our trusts portfolio beyond the usual local grantmakers on whom we have been very reliant throughout our recent history. We have established a fundraising committee as a sub-committee of our own board who have a specific remit for monitoring and developing our fundraising on a monthly basis.</p> <p>The receipt of the legacy income has given us some resources which we can invest in a more diversified income portfolio. In the last year, we have grown income across all of our main channels: individual giving, trusts, grants and corporate. We are confident we can continue to grow this income over the coming years so we can build sustainability whilst growing to meet the growing demand for our services.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.</p> <p>The main factor impacting TRAIN's finances over the last few years was the receipt of a large legacy in 2023. We were aware this was coming prior to the end of the financial 22/23 financial year, which is why we took the strategic decision to allow a greater deficit in that year, which you'll see turned into a notable surplus in 2023/2024. This legacy is being invested carefully in mechanisms to increase the long term sustainability of TRAIN.</p> <p>This includes:</p> <ul style="list-style-type: none"> • transition from an operational trustee board to a non-operational board with the day-to-day operations of the charity run by a Chief Executive Officer. XXXX was appointed as our first CEO in January 2024. £100k of the money from the legacy was designated to cover CEO costs for the first 18 months of employment. • we have engaged an external fundraiser, Better Story, to assist us with fundraising bids to foundations and trusts, as this is a major source of our funding. • exploration of new funding avenues to ensure income diversification and sustainability. We are expecting the second payment of the legacy in the current financial year and plan to use this to ensure sustainability of our funding going forward. Whilst our funding strategy has yet to be finalised, it is likely to include an increased focus on individual and corporate giving and events, which will likely require us to employ a part-time fundraiser. 	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.</p> <p>We do this in a broad number of ways. We inherently understand first-hand the local needs through 22 years of making a difference to our residents by serving the Didcot Community. This has enabled us to gain organisational competence and experience through seeking out and working with particularly vulnerable young people and growing the organisation's resources of employed and volunteers to meet the increasing demands breadth and volume of user demands. By working closely with our service users in a "live" and current environment we are able to identify the needs by doing outreach and youth work on the streets and public places of assembly including shops, parks & Skate parks.</p>	

Additionally, we make use of publicly available data such as the attached Didcot profile, which gives a breakdown of the largest issues facing the community, such as child poverty, educational attainment, crime and health outcomes for children and young people.

Linked to this, we try to align our own activities and plans with those of statutory services such as town, district and county council, police plans and local school priorities. Doing so ensures we are truly working collaboratively and gives us greater access to statutory funding.

We also source our own data directly from service users and stakeholders (e.g. parents), and more details on this data are in the section that follows. A notable example is the use of the Warwick Edinburgh Mental Wellbeing Scale, which gives us good, benchmarked data on the main challenges facing young people in the town.

TRAIN reaches out through multiple communication channels, including Thames Valley Police, statutory care, schools, social media, District Council, parents & guardians, our own young people's friends and parental friends, many of whom have become passionate about TRAIN and have provided voluntary services in recognition of benefits their children received.

In addition to the general activities, we also remain flexible in creating specific and targeted initiatives to respond agilely to emerging needs and trends. Through our networks of other associated agencies that we collaborate with, we are flexible in being able to respond to counteract emerging issues and dangers such as a rise in specific county lines drugs, knife crime, location-based issues, etc. This work makes the communities we work in safer for residents by design.

Further identified needs come through working with currently 6 primary schools in Didcot and surrounding villages and the 4 Secondary Schools within Didcot and Wallingford School since 2023 we have expanded into Wallingford. For example, in response to a concern from the Targeted Youth Support Service and the local schools, we designed and rolled out the Safer Streets project. The project is based on the belief that violence against women and girls thrives in a culture where sexism is accepted or tolerated, so we need to challenge 'everyday sexism,' sexist language, and jokes to address the issue. The pilot scheme was a huge success and continues to expand.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

At TRAIN, we believe that placing the voice of young people at the heart of our organisation is crucial to our success. This year, we're proud to have established our Base Council – a group of young people who speak directly into the decision-making processes at TRAIN. The Base Council has already made significant contributions, including participating in the selection process for our new CEO and members of our youth work staff team. We recognise that young people understand their needs and context better than anyone else, and as youth workers, one of our greatest tools is our ability to listen.

We also make use of the aforementioned WEMWBS tool to assess need - see attached data. Our core demographic is the marginalised and disadvantaged young people in Didcot and Wallingford. I've attached a map of our Didcot service users, and you will see that the highest concentrations of our service users fall in those areas of highest economic and educational deprivation. Indeed, within LSOA 013D, over 1 in 4 young people grow up in poverty, and this also contains our highest concentration of service users. So we are confident that we are reaching our priority vulnerable groups and also involving them in project design and planning.

In a youthwork context, consulting service users is done as a continuous and dynamic process. Handing out forms rarely works. However, informal conversations in the course of a youth club settling asking questions such as "What do you like about coming here?" or "How better can we help meet your needs right now?" yield insightful results which shape our practice.

We also survey parents and carers. Whilst not direct service users, they are key stakeholders, and their input will shape our activities. Recent results from that consultation are attached.

We are keen to work closely with local partners and stakeholders to ensure they have appropriate input into our work. This is done through standing meetings which reveal more nuance rather than surveys. For example, we have standing meetings in place with the local police team and also with the Community Safety Partnership to discuss issues such as anti-social behaviour and how our activities can best address issues

they are facing. Similar conversations occur with the schools as we design programmes to meet their needs. For example, we have been asked to address the rising mental health challenges facing primary schools and have designed a programme to address this issue.

Collaboration is one of our organisational values, and we work closely with other local charities and service providers to ensure a joined-up approach to addressing community need. We are pro-active participants in the Didcot Wellbeing Web – a network of local charities and statutory services set up to address the issues facing young people in the town. We have also collaborated with local charities, notably SOFEA and The

Abingdon Bridge, on initiatives such as a cooking project at the SOFEA kitchen and a parent mental health workshop which we hosted at TRAIN's youth centre.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

At TRAIN, our commitment to diversity, equality, and inclusion is central to our work to ensure that our services genuinely meet the needs of all young people, especially those who are vulnerable or from priority groups.

We implement this in the following ways:

Designated programmes for priority groups: To ensure that all young people feel represented and supported, we run specialised groups tailored to meet the unique needs of disadvantaged and priority groups. Our LGBTQ+ Allyship Group provides a safe, affirming space where young people can connect, express themselves freely, and receive support from both peers and our trained staff. We also run a Neurodivergent Group, designed to create a sense of community among neurodivergent young people, where activities are structured to recognise and celebrate their strengths while addressing any additional challenges they may face. Our Young Women's Group offers a focused environment where girls and young women can discuss relevant issues, build confidence, and develop resilience.

Inclusivity in Program Design: We build inclusivity into the design of all our programs, shaped by input from the young people and stakeholders we serve. For example, our Base Council, which includes young people from varied backgrounds, gives direct feedback to our team, helping us refine services so they remain welcoming, accessible, and relevant to everyone involved. This process ensures that the voices of young people are heard at every step, especially those who may face greater barriers due to their backgrounds or circumstances.

Commitment to Non-Discriminatory Practice: TRAIN's DEI policy mandates that no service user is discriminated against, ensuring equal access for all young people. Our team actively works to create a welcoming environment and make reasonable adjustments for young people with disabilities or additional needs. We remain particularly sensitive to the needs of those who may feel isolated or face social barriers. Staff are trained to avoid any unintentional biases and create a culture of respect, making TRAIN a space where everyone feels valued.

Reaching Young People through Targeted Outreach: Our outreach programs bring us directly into the community, meeting young people in local parks, shops, and other shared spaces. This style of working allows us to connect with some of the most marginalised young people in Didcot and Wallingford - young people who might not otherwise access formal support systems. By working in these spaces, we reduce the physical and social barriers that can prevent young people from engaging and being heard.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We have developed a new outcome measurement tool that we can use directly with service users to evaluate our performance in meeting their needs. This tool builds on our work with WEMWBS by expanding beyond mental well-being to assess outcomes related to behaviour, communication, interests, and more. It will serve as the basis for our reports to SODC. We are also considering adopting the "Youth Stars" tool from Outcome Stars for higher-engagement work, such as one-to-one mentoring.

After many years of working with disadvantaged young people, our team is skilled at recognising signs of poverty and vulnerability among them. We receive numerous referrals to TRAIN from schools, the Targeted Youth Support service, social workers, police, and others, ensuring that we are reaching priority groups. We continue to use direct surveys for parents and guardians, which allow for anonymous feedback, which is historically very positive. We have five years of experience using the Edinburgh & Warwick scale direct service user surveys, which enable in-depth, multi-perspective analysis to identify and prioritise needs, allowing for year-on-year comparisons.

Deprivation data highlights the depth and scope of needs specific to localities, wards, and LSOAs. As part of our commitment to EDI, our CEO is part of the Oxfordshire Youth EDI Core group, devising methods to ensure a more equitable youth provision across the whole of Oxfordshire. Our recent work has been to devise a monitoring survey for all youth providers in the county, so we can identify those vulnerable or priority groups who may not be accessing services. Furthermore we are working on training initiatives for the sector such as an upcoming anti-racism training workshop for youth practitioners. We also receive feedback from key school staff on the benefits of our work with their students, both at the individual and group levels and in relation to specific programs. This feedback supports the continuous improvement of our programs and helps us demonstrate the varying needs of different groups of young people across schools.

We hold regular meetings with the Thames Valley Police-led Community Safety Partnership (CSP), of which we have been a member since its inception. These meetings allow for a detailed discussion of the most vulnerable young people across South Oxfordshire, enabling us to share insights across agencies and develop well-informed cases and profiles.

Where the needs of the young person are highly complex and require highly specialist interventions beyond our professional competence we will collaborate with the third party or help seek out the most appropriate third-party organisation and facilitate a handover to ensure as much as possible the young person will not avoid the treatment or therapy and will commence their road to recovery or resolution. On occasions we have been able to receive back that young person and re-integrate them into our activities. This has also included chaperoning young people to court hearings.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

721

Please explain how you have determined the number of beneficiaries.

From our 2023-34 beneficiary count, of all of the combined services that we have delivered for the young people and the community we have 529 recorded service users. On the hugely successful carousel event day at DGS we reached a further 240 young women. We believe that it is a reasonable to assume there is 20% overlap in that data set so that calculates to a total service user count of 721. In addition, we have also not added any planned growth to these figures for the coming 2 years even though we would expect to grow the service users by something in the order of 5% per year.

It's worth highlighting, too, the extended opportunity benefit of TRAIN's provision. For example, because of the quality of service provided by TRAIN, the OCC Targeted Youth Support Service has diverted its detached provisions away from Didcot to work in underserved areas.

We might also wish to consider the secondary beneficiaries of our work. This includes the family members of those we work with, and our parent quotes attachment demonstrates the immense benefit to their lives. Further, we might consider siblings and peers who are positively influenced indirectly. And finally, as we work with the police and CSP to reduce anti-social behaviour, thousands of residents of Didcot and Wallingford benefit further through the general improvements to community safety.

Furthermore, various studies on the economic ROI of youth work, such as UK Youth and Frontier Economics (2002), estimate a direct benefit of £3 - £6 to the taxpayer for every £1 invested through increased employment rates and decreases in crime. This results in an extended opportunity benefit.

Please describe who will directly benefit from your services/activities.

In terms of context and setting out the scale and root cause of the problem, many of Didcot's wards feature consistently amongst Oxfordshire's 20 wards with highest levels of economic deprivation. Didcot is made up of 17 LSOAs (Lower Super Output Area). These are usually an area of about 1600 people. The IMD (Indices of Multiple Deprivation) is based on these. There are about 36,000 LSOA's in England. There are 5 of these who are in the most deprived nationally in this domain. A further 3 are in the 30% most deprived and another 4 in the 40% most deprived (source Oxfordshire Community Foundation "Didcot Youth Analysis").

As regards vulnerability, a significant proportion of households in the town claim employment benefits, are considered economically and educationally disadvantaged low income households, are in over-crowded housing, are headed by lone parents and/or are in social housing. Didcot has a relatively high proportion of

adults with no qualifications. Before the introduction of compulsory continuing education for 16-18 year olds, 3 wards in Didcot had amongst the lowest staying-on rates in Oxfordshire, suggesting low aspirations despite relatively good educational performance in the local secondary schools. These circumstances tend to generate higher levels of need amongst young people and their "families" for support in growing into stable adults.

We support young people especially those most vulnerable and engage disadvantaged young people in positive activities, whilst empowering and providing them with opportunities and tools to make the right decisions, rather than becoming involved in criminal activity and being disengaged with the local community.

We support YP in our community who experience a range of disadvantages, including:

- Risk of abuse (including peer on peer) and child sexual exploitation
- Exclusion and unemployment
- Social exclusion arising from poor family and peer relationships
- Mental health issues and illnesses
- Domestic violence
- Bullying.

Our support of YP directly benefits the family of the YP by providing the YP with the skills, understanding and emotional capacity to maintain and manage positive relationships. In some circumstances we also liaise directly with the parents/guardians of YP to help improve family relationships e.g. we offer advice on how to communicate with YP.

We also support YP in gaining employment by running CV workshops twice a year (target: 75% of attendees will obtain PT employment within 1 month of attending the course) and have created a development zone in our new offices which has computers that YP can use to complete homework or work on their CVs.

Our participation programme gives YP the opportunity to learn skills that will be recognised and valued by employers (e.g. organisational skills, leadership skills). We also send a select number of YP on a Young Leaders course run by Oxfordshire Youth which is recognised by UCAS. We aim to send two people a year on this course.

In addition to supporting vulnerable young people there are direct and indirect benefits for their Parent/s/Guardian, siblings, wider family members, friends, neighbours, local citizens and communities.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

TRAIN works in the gap in the provision of youth services for young people who do not easily engage with mainstream provision but nevertheless are vulnerable, at high risk and are exposed to educational failure, crime, child sexual exploitation, alcohol and substance abuse, and other risky behaviours. TRAIN's mission is to seek out, engage, and empower these children and young people and reduce the negative impact on both their short- and long-term life chances.

An excellent example of how TRAIN's services reduce the need for input from the council is OCC's Targeted Youth Support Service, which does detached youth work elsewhere in the county but intentionally does not do this work in Didcot because of TRAIN's presence.

Furthermore, Didcot's primary care network's social prescribers often refer young people to TRAIN, where they might otherwise refer to council services for support.

Working closely with the police and CSP to reduce anti-social behaviour through positive diversionary activities creates enormous cost savings compared to the alternative of young people entering the criminal justice system.

Perhaps the most material cost savings TRAIN provides is through the school-based mentoring programme. Supporting young people in their educational engagement before exclusion mitigates the risk of dropping out of school and entering high-cost alternative provision programmes.

We liaise closely on safeguarding and child protection issues with the multi-agency safeguarding hub and with Oxfordshire's Child Sexual Exploitation team. These relationships enable us to seek out options for finding optimum solutions by collaboration, thereby freeing us of the waste of duplicated effort.

A material aspect of TRAIN's identity that helps it to initiate relationships with these young people is that it is independent of these formal organisations and the Police and Social Services. This is part of our uniqueness in how we informally reach out to the people that we do and can build trust which is fundamental to building the foundation for changing lives for the better.

In the SODC Joint Scrutiny Report September 2024, The CSP, including active TRAIN membership, helps to deliver the corporate objectives of "Improved economic and community well-being", "building healthy communities", and "working in partnership" by bringing local organisations together to tackle crime, protect vulnerable people and help people feel safe. The first bullet point states that SODC youth workers: "Engaging with young people involved in anti-social behaviour in Didcot. After local youth workers built a rapport with the group, they instead chose to take part in activities provided by Didcot Train". This saved duplication of effort and demonstrated collaboration at work.

Our new Chair, XXXX, has recently retired from his role as Chief Executive of Birmingham Children's Trust. Before this, he was CEO of Wokingham Borough Council. Through this experience, XXXX has an intricate knowledge of the balance of state and voluntary sector provision to achieve tangible outcomes for young people, and we're looking forward to his experience further enhancing our work and creating more benefits for SODC and its residents.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our open-access community provisions run continuously throughout the year, and we are currently running ten open-access youth work sessions each week, in addition to our school-based and detached/outreach work, contributing a further 15 weekly sessions.

Increased Mental Wellbeing

Across our programmes, but particularly through our mentoring, youth club, holiday programme and football sessions, we expect to see improvements in young people's mental and emotional well-being. In the last year, 67% of our service users improved their confidence following interactions with TRAIN and over 305 young people showed improved mental health.

Healthy relationships

Across our programmes, we support young people in building positive relationships with those around them and their community. For example, our intergenerational community social action project improves relationships between younger and older community members by facilitating positive interactions.

Reduction in anti-social behaviour and risk-taking behaviours

By providing positive diversionary activities in a safe environment, TRAIN will reduce risk-taking and anti-social behaviours among participants, as our previous work with young people has shown. Last year, 165 young people reduced their likelihood of engaging in risk-taking behaviours as a result of their interactions with TRAIN.

Our close collaborations with the police and community safety partnership ensure we are working together and collaboratively on this issue, which is crucial for positive, healthier communities.

This outcome contributes to an overall improvement in community safety and a decrease in nuisance for local businesses. For example, recently, a large group of young men (aged 11-14) were involved in an altercation with police in Didcot town centre, which was at risk of escalating. Our detached youth workers intervened and used their relationship with the young people to de-escalate the situation and disperse the group.

Greater Engagement with Education and Employment

Many of the young people who engage with TRAIN are at risk of exclusion or not in education, employment, and training (NEET). TRAIN's mentoring programme is uniquely effective in addressing these issues as there is a pre-existing relationship with these young people who engage with our open-access services. Through TRAIN's mentoring programme, young people build practical skills that support educational engagement and

employability. This is a key priority area as early intervention in this area is much more cost-effective than waiting until they reach adulthood, at which point economic inactivity creates an enormous financial burden for the state.

Enhanced Community Participation and Inclusivity

TRAIN's inclusive support groups, such as the LGBTQ+ allyship group and neurodivergent group, create a stronger sense of belonging among young people who may feel isolated. By creating accessible spaces where young people feel safe and valued, we increase community participation for marginalised groups.

Measuring Outcomes

I've detailed headline measures for these outcomes in the targets spreadsheet. In addition to those listed, we use a mix of quantitative and qualitative data: attendance records, well-being scales, self-assessment surveys, and feedback from participants, families, and schools. Together, this builds a strong evidence base for the effectiveness of our programmes.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

TRAIN has established strong partnerships with various local organisations to support young people in Didcot and Wallingford, Oxfordshire. These collaborations allow us to maximise our impact and reduce duplication of services.

Abingdon Bridge: TRAIN has enjoyed good collaborations with Abingdon Bridge. We recently co-delivered parent workshops with Abingdon Bridge at our youth centre in Didcot. These workshops provided valuable information and support for parents and were open to the parents of service users of both organisations.

SOFEA: TRAIN recently organised a joint summer holiday activity day involving cooking and gym programmes for economically deprived young people from Didcot, making use of the Nourish and Flourish kitchen at SOFEA's site on the edge of town.

Didcot Wellbeing Web: TRAIN is also a core member of the Didcot Wellbeing Web, a designated group of stakeholders and partners who meet regularly to collaborate on issues affecting young people in Didcot. We are currently working together on establishing better signposting and information systems for those needing help, as well as discussions on upstream interventions to the youth mental health crisis.

Schools: TRAIN has excellent relationships with primary and secondary schools in Didcot and Wallingford. We provide mentoring courses and other targeted programmes, working closely with the SEND leads in these schools. This allows us to identify and support young people who may be struggling with educational engagement, mental health issues, or other challenges.

Police: We have open communication with the local police neighbourhood team, and our CEO recently spoke at the team's away day. Police officers have visited our provisions and we have received funding for a mentoring project from the Police and Crime Commissioner. We're working on organising an upcoming football match between police and young people, and we can use our unique position to broker improved relationships between young people and the police.

Community Safety Partnership: We have regular standing meetings with the CSP team. We work together on issues related to community safety and anti-social behaviour. Recent joint projects include a graffiti project at Wallingford Bridge and summer skate park workshops.

Oxfordshire County Council's Targeted Youth Support Service (TYSS): The TYSS has reduced their activity in Didcot due to TRAIN's presence, to focus on less served areas, but we maintain open communication and occasionally collaborate on projects, such as a group mentoring programme addressing concerns about child sexual exploitation.

Oxfordshire Youth: TRAIN is part of the Oxfordshire Youth (OY) Changemakers network and a core member of their Equality, Diversity, and Inclusion (EDI) working group. We work together on various initiatives, including OY's young leaders programme and a potential upcoming schools-based mentoring programme.

Sovereign Network Group: TRAIN is supported by Sovereign Network Group on projects for the benefit of their residents, including an upcoming intergenerational community action programme.

Wallingford Town Council: In Wallingford, TRAIN has worked closely with the Town Council to establish a youth service in the town and support the setup of a youth council.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Strengthening and Expanding Collaborative Partnerships

Collaboration is at the heart of TRAIN's work, and we see it as key to building financial resilience. By strengthening existing partnerships and proactively developing new ones, we can expand the reach and quality of our services and create shared resources that reduce individual costs. For example, working closely with organisations like SOFEA and the Abingdon Bridge on initiatives such as parent workshops helps spread operational costs across projects, while also allowing us to reach a wider audience. These partnerships allow us to leverage each other's strengths, making it possible to design and deliver services that have a deeper and longer-lasting impact on young people in Didcot and Wallingford.

We will also look for new partnerships beyond the youth sector, looking to link with local health services, educational institutions, and businesses. By working with organisations in sectors like health or education, we can create new funding opportunities that may not be accessible to us individually, and gain expertise and resources that enhance the quality of our youth work. Our participation in networks like the Didcot Wellbeing Web is a good example, where we have been able to interface with the schools and primary care network.

Collaborative Grant Applications

Joint funding applications represent an opportunity to develop our financial sustainability. We've had poor results to date – funders seem to like the theory of joint bids more than their actual practical outworking! However, on this occasion, Oxfordshire Youth are presenting a bid to SODC for a school based programme, which they would sub-contract us to deliver in Didcot on their behalf. I believe Didcot Wellbeing Web is also applying to this fund with a view to releasing funds for collaborative activities. If successful, these joint funding applications give us the opportunity to pool resources and expand our impact. These collaborations could also help secure larger-scale funding for projects that target critical needs, such as youth mental health.

Optimising Operations for Cost Efficiency

In addition to partnerships, we are committed to making our operations as cost-effective as possible. Shared facilities are one key way to achieve this. For example, the recent collaboration using SOFEA's kitchen for cooking sessions allows us to save on venue costs while engaging young people in a new environment. Similarly, our partnerships with local schools allow us to use school spaces for youth activities, reducing rental expenses and bringing our services directly to young people in familiar settings.

It's also worth noting the role of volunteers in our sustainability. Volunteers play an essential role in our work, reducing our staffing costs while enhancing the community's investment in TRAIN's mission. We have volunteers involved across the life of the organisation, including youth work delivery, IT, and fundraising, and we recently replaced our paid administrator with two volunteers as a way of increasing financial resilience.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Through some of our citizenship and participation activities we have been able to promote values of environmental sustainability among young people. For example through litterpicks or other green projects. Corporately, we are keen on making progress in this area, and would value any further resources or support that SODC were able to offer its partners.

Wild Oxfordshire	Ref: SRev25-27/44
<p>Financial Review</p> <p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p> <p>If we do not succeed in raising sufficient funds then we will greatly reduce the Community Ecology programme's services in SODC. We receive some money in varying amounts from all of Oxford districts, and work in rough proportion to the amount of funding we're receiving from each.</p> <p>We will aim to cover core costs through applications to other funders such as trusts with environmental focuses, and through fundraising drives such the Big Give.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p> <p>Wild Oxfordshire have recently been working on reducing risk and diversifying the charity's income streams. Historically the charity has relied primarily on major donors, trusts and local authority funding, however we are now additionally focussing on working up larger, more long term partnership projects with others in the sector. This is an important part of other growth as a charity and to ensure we can serve the communities we work with as best we can. There are also additional opportunities through working with businesses on their nature recovery practices, and taking advantage of the increasing desire from companies to fulfil their CSR responsibilities. We are also beginning to seek out opportunities around the intersection of nature and health, with the OxLNP Inclusive Nature Recovery Group, which will open up new funding options for us. We continue to also draw a strong connection with how our work with communities on nature also delivers benefits for climate change, and will continue to explore funding opportunities that have a direct link with climate change goals for the County.</p> <p>We have recently recruited three new trustees, who bring new connections, expertise and fundraising skills. As well as supporting multiple parts of Wild Oxfordshire's strategic vision, almost all trustees are active in supporting the organisation's fundraising strategy.</p> <p>Our new funding constituent and opportunity tracking software Donorfy is being used as a central funding hub for our staff and trustees. This has already proved useful in recording what funding sources we have, delegating tasks and collating opportunities for project and core funding costs. The costs for this have increased recently as we've reached a new threshold of constituents as we input and use the software, and we're using the software in more complex ways.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.</p> <p>During and after the pandemic, a number of trusts from which Wild Oxfordshire applies for funding from changed their priorities from environment and ecological to social and healthcare. This reduced the number of organisations from which we could receive funds from.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.</p> <p>Nature and biodiversity continue to plummet in Oxfordshire. Development, habitat fragmentation, water pollution and severe weather events are driving the decline in abundance and diversity of wildlife. All of us across the county have a role to play in helping nature's recovery, and Wild Oxfordshire is well placed and ready to help people take action.</p> <p>Our Oxfordshire-wide Community Ecology programme has been operating for over a decade and we have a strong understanding of the type of information and expertise community groups need and how to deliver it. We are approached by several groups a month for free advice on their biodiversity projects; we have never had to seek out groups that might need our help as our reputation in this area is so established that we are</p>	

recognised as the go-to local charity for this support. Each request for advice, surveying, reports, practical work or engagement work receives a bespoke approach where we talk through and identify what each group needs before starting work.

The demand for our time is also increasing - in the 2023/2024 financial year, our team were approached by 70 community groups, schools, town/parish councils for advice, and for 2024/25 this has already reached 67 groups - see attached data. This is in some part driven by the new Biodiversity Duty that came into effect recently, where public authorities in England, including parish and town councils, must consider what they can do to conserve and enhance biodiversity. Parish-scale authorities with only a small number of people on their staff and committees rarely have the knowledge in-house to confidently deliver biodiversity projects on their land. We undertook a survey of biodiversity-related activities undertaken by West Oxfordshire's Town and Parish Councils in 2023, and found that expertise and confidence in what councils were doing was a key barrier to action. District and county nature teams have negligible capacity to advise such groups - we often receive 'referrals' from district councils for help with community groups that have contacted them for help on nature projects.

There are also limited places where groups can receive financially viable training on biodiversity skills. Where we have undertaken free training for volunteer groups to upskill them in wildlife surveying, we ask the question of whether they would like to carry out similar sessions with us - the answer is yes 100% of the time.

Our Partnerships Programme places a strong focus on connecting people who are passionate about supporting nature in their local area. We listen and strategize collectively on how best to bring together effective partnerships of government, community leaders, landowners, farmers, businesses and more to support nature's recovery across the county. The demand for this work is fast growing in Wild Oxfordshire and we want to proactively invest in and support this work to meet the growing demands. This is an exciting growing frontier for our organisation and enables us to leverage our well respected experience of convening parts across South Oxfordshire for the benefit of people and nature.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Each request for Community Ecology advice, surveying, reports, practical work or engagement work receives a bespoke approach where we talk through and identify what each group needs before starting consultation is therefore inherent in this work.

Although two of the partnership meetings we formed are long-established groups (CTA and BAG groups), the Nature Communities Roundtable was set up in Sept 2023 and is still relatively new. The first meeting consisted of a discussion with all of the groups what the purpose of the group would be - among other things, this was confirmed as "Building individual relationships and pathways for support within our sector and informal sharing across groups to identify leveraging, collaboration opportunities". Many other groups have been invited since its formation.

One of the outputs of this group has been the Oxfordshire Inclusive Nature Recovery Group, where nature-based groups and voices from under-represented groups meet to discuss projects and issues within the sector. Discussions from this group have so far influenced how some of our training sessions are run, and is now influencing about how we work with priority groups that are currently underrepresented in our Community Ecology work. Since our Community Ecology service began, we have let groups come to us for biodiversity advice. However following discussions with this group and hearing about how priority groups may not be approaching us due to a lack of capacity to even start thinking of and planning nature recovery plans and projects in their local area, we are hoping to start reaching out ourselves to disadvantaged groups.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Whilst a very small organisation, Wild Oxfordshire, to the greatest extent reasonably practical, manages its organisation and the activities that it undertakes in accordance with our policy.

To support this objective, Wild Oxfordshire:

- Communicates this policy to employees, employment applicants, trustees and volunteers.
- Incorporates appropriate duties relating to the implementation of equal opportunities policy into roles and objectives of employees.
- Ensures that recruitment and selection is undertaken in a non-discriminatory manner including job descriptions, advertisement, and short listing as well as interview techniques and questioning.

- Ensures that promotion, advancement and performance review will be undertaken on merit only and in accordance with this policy.
- Expects that those involved in its activities to conduct themselves in a manner consistent with this policy.
- Makes reasonable adjustments to the information we produce to make it accessible to people with disabilities.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Although we do receive unsolicited adhoc feedback from groups, we have started to ask for feedback from users of our Community Ecology services through a Google form sent out when our work with the group is completed- this will help us to understand where our service is delivering well and where we can improve it.

We are also beginning to undertake storytelling evaluation for our Community Ecology project work, to capture in more depth the experiences they have with Wild Oxfordshire.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

516

Please explain how you have determined the number of beneficiaries.

This is formed of the following numbers:

- 335 - data collected on the number of people that engaged with the Community Ecology programme in SODC ONLY in the last 9 months (the time at which we started to collect this data), with a proportional extrapolation for the remaining 3 months. We hope to reach more people with additional funding from SODC
- 100 - additional people we hope to reach with more resourcing from SODC
- 81 - the number of people we engage with through our partnerships work.

Please describe who will directly benefit from your services/activities.

Through both our programmes, we support and encourage environmental organisations, volunteers, and landowners to work together, by sharing information and good practice, influencing decision-makers and initiating new projects. We work in partnership with over 60 organisations and constantly build new partnerships with other sectors to broaden the diversity of our engagement and community support.

Our beneficiaries include the general public, community groups and parishes, landowners, nature conservation organisations, and other groups with an interest in Oxfordshire's natural environment. Our work and our partnerships all benefit wildlife diversity in the county and beyond.

The Community Ecology Project will directly benefit all residents who benefit from the work of their local voluntary conservation groups which we consult with, through improved local green spaces and increased nature connectedness. Following discussions with the Oxfordshire Inclusive Nature Recovery Group, we are hoping to start reaching out to disadvantaged groups that may want to work on biodiversity projects in their local area but do not have the time to work up and apply for funding for them. These may include economically-disadvantaged, educationally-disadvantaged, migrant groups, individuals with disabilities, and those with impairments.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

By enabling local voluntary groups to better conserve and enhance their local environment, we are improving habitats across Oxfordshire - this fits directly into the Emerging Corporate Plan priority "Action on climate change and nature recovery". Our work also has relevance under the "Thriving and healthy communities" - our the projects we work on improve spaces for people as well as wildlife. Recently we gave advice to SODC's Communities team about a park in Berinsfield that is to become more accessible to residents with nature education opportunities, as well as more biodiverse following improved management.

We often receive 'referrals' from district council biodiversity teams for help with community groups that have contacted them for advice on nature projects. This reduces the amount of time and resources needed by their own officers, who often have little time to input into such schemes. We have a good working relationship with SODC's Council's Nature Recovery Officer and Climate Change Manager, and have inputted into the early stages of SODC's emerging Green Infrastructure Policy.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Action on climate change and nature recovery

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

More people positively engaged in effectively conserving & enhancing nature.

More Community groups, landowners and town/parish councils have the confidence and knowledge to manage their land for nature.

Nature recovery organisations feel connected and that there are opportunities to explore partnership working.

Wild Oxfordshire has seen increased or sustained interest from local parish groups and landowners in the South Oxfordshire area, keen to increase the biodiversity in the areas that they manage and live in, but often lacking the confidence and means to make a difference. If we receive support from SODC, we will be able to meet the demand by providing help and expert nature recovery advice, enabling residents to become positively and actively involved in conserving and enhancing nature.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Working together for Nature’s Recovery is essential so that we can support each other and collaborate to achieve greater impact for our environment and communities. Partnership working is at the heart of all of the work we do at Wild Oxfordshire - unlike many nature organisations, Wild Oxfordshire owns and manages no land in the county, so forming partnerships is truly essential to our work – this is reflective in the employment of our ‘Hedgerows and Partnerships Officer’. A few of our partnership projects are outlined below.

We bring together all those working and volunteering for nature within strategic partnerships including the Oxfordshire Local Nature Partnership; landscape partnerships such as Curlew, Yellow Wagtail and Evenlode Catchment; and across our community work. We are working very closely with Oxfordshire County Council on developing the Local Nature Recovery Strategy (LNRS) for Oxfordshire – the big plan for nature which sets out what we need to do, and where to achieve nature recovery. We run the Biodiversity Action Group that the Conservation Target Area Leads meetings several times a year to discuss project and partnership work, and have most recently set up an Engaging Communities Round Table meeting with organisations who work with community groups around nature and the environment in Oxfordshire, to foster better collaboration and increase our joint positive impact.

We have teamed up with CPRE Oxfordshire for several years to deliver Hedgerow Heroes projects across the county. This is a national campaign funded by CPRE (Campaign to Protect of Rural England) which aims to expand the hedgerow network across the country, rejuvenate unhealthy hedgerows, and empower communities to take action for nature on their patch.

Wild Oxfordshire’s Hedgerows and Partnerships Officer worked closely with a small group of volunteers (project leads) within each location to develop and carry out bespoke hedgerow projects. Throughout the autumn and winter months, nearly 400 people collectively rejuvenated 500m of hedgerow and planted over 2.5km of new hedgerow which built on the success of the first phase of Oxfordshire’s Hedgerow Heroes. We have secured funding to deliver this project this autumn/winter, working with more communities to increase and restore this habitat.

We are working up a project with the Oxfordshire Local Nature Partnership and BBOWT to implement a “Nature Buddies” scheme in several areas across Oxfordshire - this aims to connect people who are less likely to interact with nature and receive its associated benefits with those who are trained to facilitate walks and volunteering sessions in both urban and countryside settings.

We also work with Community First Oxfordshire, a charity helping communities to help themselves with community led plans and other issues, to give nature policy advice to town and parish councils that are developing their Local Plans.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Wild Oxfordshire produces a fundraising plan and strategy every year to review our current and possible future sources of funding.

Our trustees and senior staff are always seeking out new funding sources - we foster relations with Trusts that give us regular and significant funding, and research new revenue streams. Our networks of environmental professionals keep us informed of different opportunities, and our partnership working approach allows us to work on bigger, long term projects that a small organisation such as ourselves would struggle to resource the development of, from significant funding sources such as central government funding.

Our Nature Positive Business workstream is also developing - we host networking breakfasts with the Berks, Bucks & Oxon Wildlife Trust, and events that highlight nature recovery action that businesses can take. We hope to be able to launch financial partnerships with some of our local businesses that come to network at these events, which will provide long term funding for our work.

Our emerging work in the Inclusive Nature Recovery sector will also open up more 'social' funding opportunities for work which we have previously not been able to consider. Working in partnership with areas and communities that are deprived of local greenspaces will see positive biodiversity and social outcomes.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Nature's Recovery is the overall aim of our Community Ecology programme. We provide information and training which provides volunteers and parishes with the tools and information they need to improve their local environment. We 'translate' global Climate Change information into locally relevant nature-based actions. Our charitable purpose is enabling the delivery of conservation action which helps mitigate the impacts of the climate emergency.

Wild Oxfordshire's CEO sits on the board of Oxfordshire's Local Nature Partnership, sits on the steering group for Oxfordshire's Local Nature Recovery Strategy (LNRS), and is Chair of the LNRS Engagement & Consultation working group. XXXX (Nature Recovery Lead) sits on the LNRS Evidence Monitoring and Reporting working group, and both attend the LNRS Prioritisation working group.

As an environmental organisation we are keenly aware of the climate emergency and actively working to reduce our carbon footprint. Details of this can be found in our Sustainability Policy, but action highlights include:

- Our staff work from home for part of the week to reduce carbon emissions from travel, and we have recently invested in conferencing equipment to better facilitate online and hybrid meetings. We send one Ecologist to each local group rather than asking several members of staff to travel to a central location, and we provide training where appropriate by zoom. For events where multiple staff members have to attend, we carpool where appropriate; some of our staff members also carpool for their commutes. We have a space where bikes can be securely stored at the office, as well as space and storage for people to change if needed before and cycling.
- We use sustainable cleaning products that use non-polluting chemicals; our Evenlode Catchment Partnership heavily promotes the use of products that will not damage our river systems.
- We use only local caterers for events to reduce food miles, opting for venues that cater in-house when putting on events.
- All furniture is sourced second hand - we also source second hand laptops where this is compatible with required computer performance.
- We use recycled paper for printing materials.
- We have a hot water system in the kitchen that is turned off at the end of every day to reduce energy costs.
- Our heating is on a timer system to operate within office hours, and is switched off over the summer.
- Food is composted on site, and used for the neighbouring vegetable garden.

<p>My Life My Choice</p>	<p>Ref: SRev25-27/12</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. The budgeted shortfalls for 2025/26 and 2026/27 for the charity as a whole are very limited and comfortably financed through the charity's reserves. We are asking for 25% of the costs from SODC that the charity needs to cover its services in the South Oxfordshire area. The other 75% of funds needed comes from a mix of sources shown in the "Funding Forecast".</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. The 2023/24 Draft Accounts show suitable reserves in place for an organisation of MLMC's size. As the charity's President says, "we have a sensible amount of money put aside for a rainy day". As well as cash holdings attracting circa 5% interest rates the organisation invests in ethical funds with Epworth Investment Management's "Climate Stewardship Fund for Charities". Our Investment Policy is available on request. The trustees have allocated an element of MLMC free reserves for a new CRM system, exploring the implementation of an HR software system, and growing the influence of the charity's campaigns nationally. MLMC benefits from a reasonably well rounded approach to fundraising that reduces risk and increases financial sustainability.</p> <p>We are looking to maintain and improve as follows:</p> <ul style="list-style-type: none"> • An annual non-statutory grant from Oxfordshire County Council, who have provided significant support annually since 1998, accounts for £101,000 of income pa. Talks continue over an enhanced offer over an extended 3-5 year contract period. • The Integrated Care Board provided funding of £62,183 for a new "Health and Happiness" project. Negotiations have begun for continuation funding from April 2025. • Since 2012 a persistent and targeted approach to smaller Trusts and Foundations has seen a steady growth in donations currently accounting for some £70,000 of charity income. We continue to find new funders on top of our growing number of established supporters. • Donations from larger Trusts and Foundations (e.g. Charities Aid Foundation, Lloyds Bank Foundation, and The Garfield Weston Foundation) are less predictable but often provide a boost to finances. Funding bids to Lloyds Bank Foundation (£75,000 unrestricted over 3 years) and Forbes Charitable Foundation (£90,000 towards working with young people in transition over 3 years) are, at the time of writing, all but confirmed with final sign off being made by these organisations in December 2024 and January 2025 respectively. • Fees received through user-led training, consultancies and research, plus the sale of our Travel Buddy scheme franchise, and entry fees to our nightclub make up circa £50,000 of income. A recent agreement has been signed for consultancy work with OCC worth £24,155 and we expect to complete two Travel Buddy scheme franchise sales worth £12,000 within the next six months. • Further support comes from a variety of sources such as community donations, District/City Councils, Thames Valley Police etc. • Gig Buddy project funded by The National Lottery Community Foundation until 31st March 2028 (Total funding £436,025 over 5 years). • Travel Buddy project funded by the Motability Foundation until 31st July 2026 (Total funding £245,908 over 3 years) with continuation funding likely. • A legacy fundraising scheme is up and running but it is early days. So far £2,000 has been pledged from supporters. 	

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Pandemic

Early pandemic we expected to see a financial meltdown for the charity. As things transpired existing major funders such as local authorities (including SODC), The National Lottery Community Fund (TNLCF), national government, and smaller Trusts & Foundations provided great flexibility and support which allowed us to quickly provide an emergency service to members and to adapt our way of working. It transpired that we experienced a COVID financial premium as opposed to a shock with income increasing. After a peak income of £522,593 for 2021/22 we have seen income return to pre-pandemic levels (Circa £440K) for 2022/23 and 2023/24, however income for both 2024/25 and 2025/26 is likely to be circa £580K.

Services

Our overall positive financial picture since Jan 2020 has seen our service provision increase rather than decrease with more activities reaching more people. For example, overall charity membership has grown from 594 to 823, those attending self-advocacy groups has increased from 130 to 217, and last year's 25th birthday celebration party attracted 132 partygoers! On top of this our Computer Buddy project and our monthly mailout to all members, introduced originally to help members through the pandemic, are now established as part of our ongoing provision. Finally, the quality of service and numbers benefiting from both our Travel Buddy and Gig Buddy projects has been enhanced due to both projects employing two staff to deliver rather than the pre-pandemic one.

Reserves

Reserves remain strong and within the range set by our policy, indeed in 2022 we invested £245,000 (now valued at £281,124) with Epworth Investment Management's "Climate Stewardship Fund for Charities", and currently have £147,475 invested in their easy access savings account (paying 5.22% interest).

Cost of living crisis

Unsurprisingly, the widespread increase in costs over recent times has not gone unnoticed, however the charity has withstood this sustained pressure on finances through generous support from funders, a tight control on costs, and through sound financial planning and decisions (evidenced by increased provision of services and maintenance of a suitable level of reserves). The main challenge has been retention and recruitment of staff. Oxford can be difficult, staff wise, at the best of times, but the pandemic induced "great churn of staff" and the pressure on wages through inflation has seen us struggle somewhat. Thankfully, we appear to be through a 2021-23 mini crisis which saw a reduction in both the quality and quantity of candidates applying for MLMC jobs, along with staff turnover increasing from 11% to 30%.

The last 18 months has seen a vast improvement in job candidate numbers and quality, along with staff turnover rate dropping to 19%. We believe that much of this improvement has come about as the UK economy has settled down, and due to the MLMC trustees upgrading the staff 'offer', which included becoming a Living Pension Employer, making notable pay increases, offering a Health Cash Plan (reimbursement for certain medical expenses e.g. dental care), and paying for staff Life Assurance.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Need locally - Through our membership base, inclusive model of working, extensive networks, and 26 years of organisational experience MLMC is well placed to understand the needs of people with a learning disability locally. MLMC serves on many focus groups, consultations and forums (e.g. Thames Valley Police Advisory Group, the local NHS's Integrated Care System, and with OCC) which helps to inform our plans and activities. At the core of identifying need is our ongoing engagement (through self-advocacy groups, daily contact, surveys etc.) with our membership base and then by having the ultimate decision-making body (the trustees) being of, and being annually elected by, the membership. This day-to-day inclusive engagement allows for a dynamic and flexible approach to meeting the needs of our members.

The Social Model of Disability has been central to the charity's approach to meeting member's needs since its inception; appropriate support, encouraging independence, within user-led projects. For example, our

trustees with a learning disability decide, after conducting formal and informal consultation with the membership (including members of our Didcot self-advocacy group) and stakeholders, upon the charity strategy and the most appropriate projects. All projects have people with a learning disability at the forefront of delivery (e.g. the Didcot self-advocacy group has a paid co-facilitator), with the necessary training and support provided. People with a learning disability, within the charity, decide which projects are the right ones to best serve their interests, and also decide through co-production what is the right approach to delivery.

Research - Well publicised research also helps to identify the needs of our members and to inform the services that we offer. A plethora of findings describe people with a learning disability facing multiple barriers and inequalities in terms of access to travel, being listened to, social opportunities, relationships, health, loneliness, employment, training and volunteering. For example, throughout the UK there are over 1.5 million people with learning disabilities, less than 6% of those known to local authorities are in paid work (NHS Digital, 2018). This depressing statistic has far reaching repercussions, most often it leads to unfulfilled lives that lack choice, opportunities, challenges, socialisation and friendships.

Flexible approach - Engagement with MLMC is at whatever level suits the individual. The majority become and then remain members for life. Some engage on a daily basis (e.g. trustees), others monthly (e.g. at a self-advocacy group), some as a one-off intervention (e.g. to learn to travel independently), and others as recipients of our newsletters and mailouts only. Our diverse service offering ensures, from an individual member's point of view, flexibility and choice is 'baked in'. Furthermore, an individual's progress is tracked through a mix of observation, interview and written feedback with evaluation taking place through regular discussions and review meetings. We also use quantitative data (e.g. total pay to members, attendees at activities, and social media followers), personal development plans, questionnaires, case studies, blogs, film, and photographs that help to identify that we are making a difference and where we need to adapt our approach.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Background: MLMC is proud to be 100% user-led and, even in our niche sector, this is a rarity. Our key strength, and unique selling point, is much more than community involvement and consultation; it is about our community, with the right support, making decisions, having power, influence, and control over the whole of their own organisation. MLMC was created in October 1998 by our now President, XXXX, who rebelled against the lack of agency he experienced as a young man. In April 2017 the charity's membership voted for XXXX, who has a learning disability and is partially sighted, to be made the lifetime President of MLMC. Additionally, XXXX, was recently awarded an MBE in the King's 2024 birthday honours for his service to people with learning disabilities.

Lived experience: Informs our work and is embedded both within the organisation's governance and operations. First-hand experience is central in deciding upon charity activities and ongoing delivery. The Board of 15 Trustees, annually elected by the 827 strong charity membership whom they represent, make the key decisions for the charity. Four lead trustees meet weekly with the Charity Coordinator to ensure regular and direct control over charity direction, and HR. This model of governance means that the charity's beneficiaries are in the driving seat at all times, either as democratic voters, project leads, campaigners or as trustees. Additionally, people with a learning disability are MLMC's media spokespeople (appearing on TV, being interviewed on the radio, and quoted in newspapers and on social media), representatives in meetings with local political figures & high-level professionals, and the people who collect our awards. At MLMC, the staff (without learning disabilities) remain firmly in the background whilst supporting, coaching and encouraging our members to take the lead at all times, and without compromise.

Involvement: Projects have a Steering Group, meeting bi-annually, made up of members, family carers, and service providers. The Groups monitor the project, share learning, celebrate success and resolve any challenges as the project develops ensuring that the voice of stakeholders and users is heard and, where appropriate, acted upon.

Regular focus groups are run with volunteers and members so that innovation and improvements can be timeously acted upon. On a daily basis we work in partnership with members, support workers, social workers, service providers, occupational therapists, local charities, and families. Together we question, listen and adapt to best serve those we support.

At countywide FE colleges we run self-advocacy groups for young people, helping to prepare them for transition into adult life. We introduce them to our projects and ask how our work might be adapted for their needs e.g. developing a games club.

Importantly, it should be noted that the charity, in 2016, won the “Best Co-Production” prize at the first ever National Advocacy Awards at the Hilton Hotel near Birmingham's NEC.

“MLMC is truly a user-led organisation, championing the voice of people with a learning disability so that they have choice and control over their own lives.” Foundation for Social Improvement.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation’s services/activities meet the needs of all users, including vulnerable/priority groups.

Approach: MLMC’s Equality and Diversity Policy was agreed by the user-led team of trustees and is written accessibly in Easy Read. To reinforce policy and values, staff and trustees receive annual equality training. In May 2022 a commissioned independent consultancy (funded via the Charities Aid Foundation’s Resilience Fund) reviewed our approach to Equality, Diversity and Inclusion and made recommendations for improvement which were then actioned. The audit showed MLMC as being an inclusive and fair organisation. This is now a bi-annual survey aimed at ensuring continuous improvement.

Background: Many of our members experience multiple disadvantage, for example, approximately 50% of people with learning disabilities have a comorbid physical health condition (e.g. hearing/visual impairment, 20-fold increase of epilepsy) National Institute for Health and Social Care Excellence website, 2022.

In terms of social inequality, the statistics are bleak with, for example, 60% living in poverty. Friendships are generally built around home life and support staff rather than developed socially or through work. Class is rarely considered, but the majority of our members reside in deprived areas of Oxford, Banbury, Didcot, and Abingdon. Few, if any, will have experienced Oxford University, Magdalen College School, or the finer things in life that Oxfordshire has to offer.

Our response: MLMC works to ensure that members’ voices are heard, and their needs are met e.g. as leaders, trainers, inspectors, and by providing accessible Easy Read information for OCC, and Thames Valley Police. Our members take part in focus groups, consultations, surveys etc. to help develop policies, strategies and services with public sector providers to promote inclusion and lives free from discrimination. The charity also actively campaigns with our Champions who lead our work to promote social justice.

Examples of the impact of this work include:

- successfully campaigning with national charity Mencap for the prioritisation of people with a learning disability to receive a Covid-19 vaccination
- donating £3,500 towards a family’s legal fund to find answers as to why their 20-year-old son died prematurely whilst in care.

Internal inclusion:

- Five trustee positions are prioritised for females, two for people from Global Majority, two for young people, and two for people with more profound learning disabilities
- Specific self-advocacy groups for women, young-people, those from Global Majority, and our LGBT community
- Our Travel Buddy scheme supports individuals with anxiety and/or physical disabilities to travel via public transport. MLMC also pays for taxis for those with more profound disabilities so that they can attend activities
- We have a long track record of providing paid work opportunities for our members and providing free activities for all
- Our commitment to being user-led and empowering our members helps to break down barriers through class. Most trustees in charities would likely be from middle/upper class backgrounds whereas all of our trustees come from 'lower' class backgrounds. Additionally, our lead members, for example, engage politicians, public sector leaders, and prominent officials (e.g. Lord Lieutenant of Oxfordshire and University Dons) on an equal footing, building positive and respectful relations.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

The needs (outcomes) we measure:

The Foundation for Social Improvement’s (FSI) independent Impact Review of MLMC’s work in 2016/17 highlighted the following outcomes for beneficiaries, which remain true today and are what we monitor and track across all of our work (including for South Oxfordshire members):

- Increased independence (e.g. confidence, knowledge, skills)
- Increased economic wellbeing (e.g. MLMC paid work opportunities, free activities, supported travel)

- Improved physical and mental wellbeing (e.g. walking club, Health & Happiness project)
- Reduced loneliness and isolation (e.g. self-advocacy groups, Gig Buddy project).

Additionally, we believe the project does achieve other outcomes, which we do not formally monitor and therefore cannot adequately evidence.

These outcomes include:

- Increased respite for family carers and support workers
- Increased understanding of needs amongst professionals, public sector and the wider public leading to improved attitudes and services, and a reduction in stigma.

How we track success:

Progress is tracked through a mix of observation, interview and written feedback with evaluation taking place through regular discussions and review meetings. We also use quantitative data (e.g. total pay to members, attendees at activities, and social media followers), personal development plans, questionnaires, case studies, blogs, film, and photographs that help to identify that we are making a difference. Attention is paid to media exposure and if campaigning and engagement leads to positive public policy changes.

External assessment: The following awards/accolades indicate that external stakeholders believe we consistently meet the needs of our members:

- Guardian Charity of the Year 2010
- Oxfordshire Community Empowerment Award 2010
- National NHS Equality Award for “True partnership working” 2012
- Trustee, XXXX awarded an MBE in the Queen’s 2013 honours list for services to disabled people
- In October 2013 we won the Prime Minister’s Big Society Award. David Cameron said “I’ve seen at first hand the great work this organisation does. MLMC empowers people with learning difficulties to design and run the services they want to see. This Big Society Award recognises the huge difference everyone involved is making.”
- Oxfordshire Charity of the Year 2016
- “Best Co-production” at the 2016 National Advocacy Awards
- Queen’s Award for Voluntary Service 2017
- 2023 Charity Awards, where we won top prize in the Disability category. Judges were particularly impressed that the charity’s entire board was comprised of people with a learning disability. XXXX CBE (Chief Executive of Cambridge House) said “that in itself is innovative. To have a charity that is entirely led by people with direct lived experience is something we need more of in our sector. I think it immediately increases the impact of the charity, both for the beneficiaries and for those who are on the board.”
- MLMC President, XXXX, awarded an MBE in the King’s 2024 honours list for services to disabled people.

MLMC is a Living Wage Employer, a Living Pension Employer, and accredited to the Good Business Charter.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

114

Please explain how you have determined the number of beneficiaries.

When a new member joins MLMC a membership form is completed with personal details (address, phone number, email etc) and added to the charity’s data base. In this way we can easily identify our members who reside in SODC catchment area. All members receive our monthly accessible newsletter and others engage in one or more of MLMC’s other services. Our database allows us to keep track of an individual member’s involvement/engagement.

Although it is stated that 114 people will benefit from this funding each year this is probably an underestimate because:

- All of our services are open to non-members of the charity so that any adult with a learning disability can benefit. Undoubtedly, some people from SODC catchment area will come into this category.
- We currently have 114 members from SODC catchment area but we expect this number to grow

during the period of funding, indeed, in 2022 we had 81 members and this increased by 30% over a two year period. We are aiming for similar growth.

- We do not include family carers in our numbers but it is reasonable to assume that a level of benefit is felt by this group in terms of a service being available that supports their role
- Our campaign work, involvement in consultations, training of professionals and inspection work for example, arguably, indirectly benefits every person with a learning disability, or at least many people with a learning disability in SODC catchment area.

Please describe who will directly benefit from your services/activities.

People with a learning disability will be the direct and main beneficiaries of our services.

The services additionally provide respite for family carers and/or support workers. For example, a two hour self-advocacy group meeting means two hours where a family carer and/or support worker has 'free' time, a three hour social event through our Gig Buddies project does likewise, whereas an individual who receives travel training/support may reach a level of travel independence that frees up considerable time for a family carer and/or support worker.

All residents from South Oxfordshire can potentially benefit by seeing people with a learning disability being visible and active in their community. A general perception in society can be that people with a learning disability are cared for, live in isolation in 'special hospitals' and go to 'special schools'. MLMC tries to change this by, for example, encouraging and supporting our members in leading their own charity, leading their own campaigns, representing the charity on social and traditional media, travelling independently, building confidence, and enhancing social networks.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The range of activities and support that MLMC offers helps to reduce loneliness and isolation, builds skills and confidence, educates, empowers individuals, and gives purpose. It is often challenging to establish a direct link but this work undoubtedly helps to reduce demand on such provision as day services, mental & physical health services, police time, and formal advocacy services commissioned by the local authority (e.g. Citizens Advice Bureau), for example. Although not a direct service offer from MLMC both staff and peer-members informally offer advice and support (e.g. the Charity Coordinator has supported members under enquiry at police stations as an Appropriate Adult).

MLMC works closely with Oxfordshire's public sector helping to develop services and keep public sector officers aware of how things "are on the ground" for people with a learning disability. Our members serve on boards and advisory groups for Thames Valley Police, Oxfordshire County Council and local NHS bodies, for example. Staff from the public sector (e.g. Community Police Officers) visit our self-advocacy groups to give and receive information. We engage with local councillors and MPs also, helping to keep them abreast of the needs of their constituents with a learning disability.

Our organisation is a key contributor to many local authority strategies with recent engagement with Oxfordshire County Council's "Day Service", "Housing", and "Building the Right Support" strategies being key examples. This engagement helps to improve the quality and efficiency of local authority services.

Our media profile and campaign work helps to keep the needs of people with a learning disability in the public eye. This helps reduce stigma and to inform policy decisions.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Given that we are asking for funding to support our full array of services in the SODC area I would ask that the reader refers to the answer given on page 6 under the question/statement "Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups". The outcomes that we want to achieve are clearly detailed along with our approach to measuring whether or not these outcomes have been met.

Specific and relevant examples of how our work in SODC will link to the "Thriving and Healthy Communities" theme are evidenced in what we intend to deliver:

- 12 x monthly mail outs per annum for all 114 members (including 2 x Health & Happiness Toolkits giving tips and ideas for a healthier lifestyle) giving information and advice (e.g. benefits, cost of living, positive relationships)
- 8 x members to benefit per annum from the Travel Buddy Scheme. Supporting equality of access to local resources and services
- 20 x members to benefit per annum from the Gig Buddies project. Supporting inclusion, connections with others and equitable access to such things as leisure facilities, arts & cultural programmes
- 4 x members per annum to benefit from the Computer Buddies (Digital Inclusion) project. Improving skills and access to services and friends/family
- Over two years increase South Oxfordshire membership numbers from 114 to 125. Building our SODC community
- 12 x monthly self-advocacy groups in Didcot for 15 members. Connections, skills and inclusion
- 4 x training/skills/guidance workshops (e.g. "Being safe in your community", "Paid work and Volunteering opportunities") per annum at Didcot self-advocacy group
- 4 x members per annum accessing paid/volunteer work through the charity. Helping with wellbeing and bringing employment opportunities
- 4 x members to receive intensive support via our Integrated Care Board (ICB) funded Health & Happiness project. This includes working collaboratively through Active Oxfordshire's Move Together pathway. The overall cohort of 20 will be supported throughout with professional/expert support, personal assessment and goal setting, a comprehensive induction programme (supported through close joint working with existing services), advice/guidance, and regular group check-ins. Training from Make Every Conversation Count will help the 20 to encourage others with a learning disability to pursue their health and wellbeing goals. Additionally, there will be group activities (e.g. walking groups, swimming etc.) and financial support to encourage engagement (e.g. gym membership, travel costs). This programme is open to non-MLMC members and has been publicised through partners (e.g. Community Connections, and networks) to encourage involvement.

Please note that all of the aforementioned activities meet at least one, if not all, of our intended outcomes, namely:

- INCREASED INDEPENDENCE (e.g. confidence, knowledge, skills through newsletter mailouts, Travel Training and self-advocacy groupwork,forexample)
- INCREASED ECONOMIC WELLBEING (e.g. MLMC paid work opportunities, free activities, supported travel)
- IMPROVED PHYSICAL AND MENTAL WELLBEING (e.g. walking club, Health & Happiness project)
- REDUCED LONELINESS AND ISOLATION (e.g. self-advocacy groups, Gig Buddy project).

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

All of our key work and activities are co-produced. This is a value and way of working that runs through the core of the charity. Page 6 of this application gives detail of the user-led philosophy of the charity and our approach to co-production

In South Oxfordshire we have strong relationships with support providers Style Acre, SOFEA and Mencap who also make referrals as do local occupational therapists, social workers, GPs, family carers, and community nurses. Local Trusts and Foundations in South Oxfordshire that support our work include Invesco Cares Foundation, Lions Club of Henley, and John Hodges Charitable Trust. Through our digital Inclusion work we collaborate with local charity SOFEA's "Get Oxfordshire Online" project.

MLMC is embedded in the Oxfordshire third sector landscape and enjoys numerous and fruitful partnerships with both local and national charities, local authorities, companies and groups. For example:

- Gig Buddy works with local charities such as Keen, Age UK and Restore (mental health), and local service providers such as Thera Trust, Dimensions, and Style Acre who refer volunteers and clients
- The County Council, City Council, and District Councils support us financially and engage our members to take part in focus groups, consultations, and high-level board meetings
- We are well known to, and regularly funded by, Oxfordshire Community Foundation and are active members of Oxfordshire Community & Voluntary Action (OCVA)
- On a corporate level we have, for example, received free storage from "Big Yellow" and free mentoring support for our Charity Coordinator from Oxfordshire's Charity Mentors. XXXX provide discounted legal support and major corporations have funded our work e.g. Tesco, Asda, Sainsburys and Waitrose (and John Lewis)

- Through our Travel Buddy Scheme, we work with local disability charities such as Yellow Submarine, SOFEA and Soundabout so that people can access their services. Other charities have used our franchise product to set up a travel scheme in their area
- Nationally we have successfully worked/campaigned with charities Mencap and Scope. We are an active and leading member of Learning Disability England as well as a founding member of the "Stronger Together" social movement made up of national self-advocacy organisations (developed with the help of Nesta)
- Our Professional Services user-led services (training, research, Easy Read translation, inspections, consultation) engage with many clients/partners which include NHS England, British Association of Social Workers, National Development Team for Inclusion, Thames Valley Police, Imperial College London, University of Bristol, University of York, Manchester Metropolitan University, The Open University, Oxford Health NHS Foundation, Oxford University Trust Hospitals, and The British Institute of Human Rights
- We work with local further education colleges throughout the county running five different self-advocacy groups for young people, helping to prepare them for transition into adult life
 - Computer Buddy receives technical support, volunteers, guidance and funding from Digital Unite, The Good Things Foundations and AbilityNet.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Financial sustainability

Page 5 of this application covers how the charity intends to become more financially resilient in the future. This approach is one that has been implemented for a number of years and has resulted in our income increasing from £188,000 in 2012/13 to circa £580,000 for 2024/25. In the same period reserves have increased from £69,000 to £450,000. I believe that this is clear proof of the charity's financial sustainability.

Example of how collaboration aids financial sustainability

Our work with SOFEA's "Getting Oxfordshire Online" project will lead to the provision of refurbished laptops from SOFEA, reducing our expenditure on devices for our members via our Computer Buddy project. al sustainability and the success of the approach.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

In 2020, working with the CEO of internationally renowned charity Climate Outreach, MLMC developed an accessible Climate Change Policy (attached to this application) with our trustees. The policy does such things as encourage staff to travel sustainably (by providing a Cyclescheme, bike racks, and 20p per mile for bike business travel) and dictates purchasing of sustainable items (e.g. recycled laptops, and organic produce). From the policy an accessible guide to Climate Change was developed outlining what it is and what an individual can do to help stop it. This guide was mailed to all of our membership base and then followed up with training at our self-advocacy groups and local colleges. This is now an established annual action for the charity i.e. mailing out the guide and providing training at the self-advocacy groups and colleges.

Both the policy and the guide were made available to Learning Disability England who encourage other organisations to adopt similar actions/policies nationally.

Our Travel Buddy scheme has, at its centre, the promotion of using public transport. The scheme over many years has helped to considerably reduce taxi and private car travel amongst our membership. Members of our young persons' campaign group have a regular "litter pick" in green spaces in Oxfordshire urban areas e.g. along the River Thames.

Through Lloyds Bank Foundation's Enhance Fund we engaged a consultant who in early 2023 undertook a review of our Environment and Sustainability Policy (attached to this application) and helping us to develop and improve our approach. This process also helped us develop a Sustainable Electronics Policy (attached to this application).

MyVision Oxfordshire	Ref: SRev25-27/15
<p>Financial Review</p> <p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p> <p>We have not yet secured any funding for this project for financial year 2025 onwards. We are continually applying for funding towards all our projects and due to the current trust fundraising climate, we always submit applications for more funding than we need. Outside of trust and grant fundraising, we also receive some income via donations, legacies, membership, and event fundraising. This is often unrestricted funding. Unrestricted funding for the charity could be allocated towards this project if needed however, when project funding can be secured this frees up unrestricted funding to be used towards our core costs, which can be extremely difficult to fund through charitable funders.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p> <p>Over the last few years MyVision Oxfordshire has invested in it's fundraising, which has improved the financial security of the charity. We are currently in the process of recruiting a part time Community Fundraiser. With a greater presence in the community we aim to reach more supporters and increase the number of donations we receive.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.</p> <p>Currently the trust/grant fundraising climate is incredibly poor. Despite a very successful couple of years, this year success rates of applications have dropped dramatically with most funders citing the fact that their application rounds were hugely over subscribed as the reason for our application not being successful. Several larger charities are also currently pausing their grant giving operations to review and refresh their priorities and strategy, reducing the number of applications we have been able to submit.</p> <p>Our financial position has been further exacerbated by cost of living. Our expenditure is increasing year on year, and we need to raise more funds to meet this growing demand. However, with funders closing their doors and the remaining ones being hugely oversubscribed there is less funding available. We have also found that individual donors and other supporters have been hugely affected by financial uncertainty, so have less income available to allocate to charitable giving.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.</p> <p>There are an estimated 5,520 visually impaired people living in South Oxfordshire, highlighting a significant need for specialised services and support. Our approach to addressing this need is community-driven, so clients are informally consulted during groups and sessions, and the service we provide reflects their needs.</p> <p>For example, after an informal discussion where clients expressed challenges around shopping, we organised a group trip to IKEA in Reading. This experience not only allowed participants to practice navigating a large store but also served as a confidence booster, as members supported one another.</p> <p>We have a group in Didcot which focuses on wellbeing activities. The emotional and social support provided by these sessions has a huge impact on the wellbeing of attendees. "These sessions give sight impaired people the opportunity to do things they may not normally do. Then you also have the mindfulness part of it which I think is very important when you're living with long-term health conditions. It's invaluable to me, that group. I'm really sad if I can't make it."</p> <p>We have also developed Green Walks sessions, which encourages visually impaired people to explore local green spaces, increasing their confidence and comfort in leaving their homes independently. "Being part of Green Walks has been very beneficial. I have gained confidence, and I now feel more comfortable leaving</p>	

the house on my own."

In other areas like Henley, and Wallingford we offer a variety of activities such as educational talks (e.g., from Thames Valley Police on online safety), audio-described cinema screenings, lunch clubs, and cultural outings like museum touch tours and National Trust visits. These diverse activities not only provide practical support but also enrich the social and cultural lives of the clients who attend.

By keeping our approach flexible and responsive to ongoing community needs, we ensure that our services remain relevant and impactful, continually improving the quality of life for visually impaired people living in South Oxfordshire.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

As mentioned in the previous question, we have a community-driven approach to service planning and delivery. Clients are informally consulted during groups and sessions, and the service we provide reflects their preferences and needs.

We also have a formal feedback form which we distribute to clients towards the end of the financial year, however it is available for clients to complete at any time. It is difficult to find a way visually impaired clients can provide feedback and thoughts on our projects in a way which is comfortable for them and confidential. We are continuously addressing how we gather impact and opinions from clients in order to provide the best service possible.

In January 2021, we conducted a stakeholder survey consulting our clients, volunteers, staff, professionals and supporters. The survey helped us gauge the level of knowledge people had of our services and what was available to them. It showed us that 40% of our clients were aware of our equipment demonstration service and only 29% were aware of our technology training service. We believe this is because these services are predominantly provided at our centre and not in the wider community. When asking what we do well 22% who live in Oxford city said "communication", compared to 11% outside of the city. When asking what we do badly one of the most common answers was "countywide reach, communication, awareness". We saw a much better satisfaction rate from our clients living in Oxford City (70%) compares to those living outside the city (48%).

One of our key objectives in our five year plan is to ensure we have a greater community presence, based on these results. The survey clearly showed that there was a distinct difference in how people perceived MyVision from within Oxford to those elsewhere in the county. Gathering data is important for us to develop our services. Having a community presence enables us to listen to people within their communities and to understand the needs in different areas. We are constantly learning and developing the best way to do this, but it is and will continue to be at the core of what we do.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Our Equality, Equity, Diversity and Inclusion policy ensures that no one is disadvantaged based on characteristics such as disability, age, gender, ethnicity, or socio-economic status. This doesn't just include clients and service users, but also all staff, trustees, volunteers, job applicants, supporters, subcontractors, and anyone else who comes into contact with MyVision Oxfordshire. 60% of staff members at MyVision are blind or visually impaired, and both our Chief Executive and Chair of Trustees are visually impaired.

MyVision Oxfordshire is committed to ensuring everyone can access our services. We recognise that disability is a protected characteristic under the Equality Act, and we work hard to fight for equality for visually impaired people. We also recognise that visual impairment can affect anyone and means we will have a diverse client base. We want to ensure our services reflect the diversity of the community around us.

Staff and volunteers are guided through our Equality, Equity, Diversity and Inclusion policy during induction and any changes are communicated via a variety of methods including email, and in person at our regular team meetings. Staff and trustees also take part in EDI training, and in recent years have invited XXXX, and XXXX into the office to deliver EDI sessions.

Services are adapted to meet the needs of our clients, and by taking our work out into communities around South Oxfordshire we eliminate the need to travel which is often one of the biggest barriers for visually impaired people accessing services and support.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

To demonstrate success in meeting the needs of all users, we will monitor outputs, outcomes and gather feedback.

We keep accurate records on our CRM, CharityLog. From this we can keep a close eye on outputs such as how many people attend our various groups, whether attendees come along to the same groups regularly, or if we are reaching new services users.

We will continue to ask clients to provide feedback via our feedback form. This is available to all clients throughout the year, but we send a copy of the form to all clients once a year in an attempt to gather a substantial amount of feedback to work from.

We regularly ask clients for feedback on individual sessions and groups so we can amend and adapt services on an ongoing basis. This can be recorded formally or be more anecdotal.

We regularly collect stories of change for our MyVision MyStory campaign. These stories are available to view on our website: <https://www.myvision.org.uk/category/myvision-mystory/>

This comprehensive monitoring will allow us to measure both qualitative and quantitative outcomes, ensuring we meet the needs of all clients.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

1,104

Please explain how you have determined the number of beneficiaries.

There are approximately 5,520 visually impaired people living in South Oxfordshire. We understand that not all blind and visually impaired people in the district will want or need to access our services, but we aim to reach all those who would benefit from our support.

Before we launched the Community Engagement project we were reaching around 10% of visually impaired people in the district. With the project established and reaching more people we would hope this figure would roughly double due to a larger community presence.

Please describe who will directly benefit from your services/activities.

Our project is for anyone with a visual impairment living in South Oxfordshire and as such 100% of our direct beneficiaries are classed vulnerable/priority groups. Visual Impairment is defined as an inability to see well even with glasses or contact lenses. This can range from mild to severe visual impairment. The latest RNIB figures suggest there are 5,520 people in South Oxfordshire living with some form of visual impairment, from mild to severe. We would estimate with a more local presence we would be able to provide services to one fifth of these people. The project would also indirectly support friends, family and carers.

The breakdown of ages for Oxfordshire as a whole is listed below (RNIB Data tool for Oxfordshire):

- 290 aged 0-17 years
- 4370 aged 18 to 64 years
- 4300 aged 65 to 74 years
- 6840 aged 75 to 84 years
- 8210 aged 85 years and over.

Many of those aged over 75 will also be living with other disabilities and conditions.

Visual impairment can affect anyone, regardless of gender, race, sexuality or background. We aim to create a fully inclusive service that is open to all.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

We work very closely with the County Council Visual Impairment Team. Providing a joined-up approach that ensures visually impaired people receive a good service. This can include working together to find the best solution for clients, joint team training and events. For instance, the statutory service does not provide equipment demonstration or technology assistance, or befriending, they look more at mobility and safety

within the home. None of our services are duplicated by the local authority.

A person may come to us and receive a video magnifier on loan, this enlarges printed material to make it easier to see. Without this magnifier they may not be able to read their post and miss vital appointments, bills or other correspondence. Another person may come to us feeling isolated and disconnected, causing depression and poor mental health. We can connect them with a social group or our befriending scheme. Another person may be getting confused with the medication they are taking. We can demonstrate the use of a tactile or large print pill organiser. Our services work to ensure that visually impaired people can live independently, meaning they are not reliant on social and health care from the local authority. It is estimated that visual impairment costs the local economy (Oxfordshire) £291,300,000; this includes direct and indirect costs. With only 1 in 4 blind or partially sighted people of working age in employment, there is a large cost to our economy. We want to see more people working who can, and our support, training, advice and encouragement goes a long way in doing this. We also aim to engage visually impaired people with other voluntary activities in the community, helping them to feel they are contributing to the local community and enabling them to feel empowered. This can help improve overall wellbeing and mental health thus relying less on local authority services.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

MyVision Oxfordshire's Community Engagement Project aligns with the Corporate Plan theme of Thriving and Healthy Communities. The achievable outcomes we expect as a direct result of the project are:

- At least 75% of the people we have worked with feel more independent as a direct result of the project. This will result in less dependence on social and health care services, family and carers. This includes the use of local outdoor spaces such as parks, and contributing to the local economy. For example, when we help someone with their confidence they are more likely to use local services, shops, restaurants and other businesses.
- At least 75% of the people we have worked with feel the support they have received has positively impacted their mental health and wellbeing. A greater level of wellbeing and good mental health amongst visually impaired people. Again resulting in less of a burden on local social and health care services. For example, when someone joins one of our social clubs or befriending service, they have less of a sense of isolation and loneliness and a better feeling of being connected to others, resulting in better mental health. Through our befriending scheme and Green Walks work we will be able to encourage guided walking, and utilise local parks, further increasing both mental and physical health.
- Work with at least 5 partner organisations. Collaborative working is essential to the success of the project and ensures we embed the project fully into the local community.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

As a whole organisation we currently collaborate with many organisations including:

- Oxfordshire County Council Visual Impairment Team
- Oxford Eye Hospital
- Visionary
- RNIB
- Guide Dogs
- Macular Society
- Blind Veterans UK
- Oxtalk – Talking News
- Age UK Oxfordshire
- Carers' Oxfordshire.

As visual impairment can affect anyone at any stage in life it is important to ensure we are working closely with other organisations and agencies to deliver our service.

For our Community Engagement Project we have to work closely with community venues and spaces in

South Oxfordshire as a location for our activities and services. Specific examples of organisations we have worked with in the district on this project include:

- Thames Valley Police Cyber Unit to talk about fraud and scams
- Specsavers Didcot - they have attended our Green Walks sessions a number of times, and provided help, information and advice on eye health
- Wallingford Talking Newspaper/ Dawn talking newspaper/Henley talking newspaper where we have shared information for their listeners
- Cornerstone Art Centre- Venue for our wellbeing sessions, our social group, and they are putting on an accessible panto this year.
- Nuffield Place - National Trust venue who have allowed us to visit a few times this year to have touch tours of the house and gardens
- Henley, Wallingford, & Didcot libraries – These libraries have all been very accommodating for our audio book clubs and social groups
- Wallingford & Thame museums- both these museums have hosted our groups for an accessible touch tour.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

MyVision Oxfordshire has a robust fundraising strategy in place and to ensure the long-term financial sustainability of our Community Engagement Project, we will adopt a collaborative and diversified approach focused on partnerships, community engagement, and income diversification.

We will collaborate with local businesses and community organisations to secure low cost venues for our activities to take place in. Engaging local businesses could also provide funding or sponsorship opportunities. We might also have the opportunity to provide Visual Impairment Awareness Training for the businesses we work with.

We already work with other sight loss charities and work very closely with Visionary. This gives us a great opportunity to share knowledge, experiences, and resources. Collaborating on service delivery experiences in this way can reduce duplication of efforts.

As we continue building relationships in South Oxfordshire we are currently in the process of recruiting for a Community Fundraiser. Their focus will be on encouraging volunteer-led fundraising activities. These activities will raise both funds and awareness of our services while establishing a regular donor base to provide a consistent revenue stream.

Through these strategies, we aim to create a financially sustainable project, ensuring that our Community Engagement Project continues to expand and meet the needs of the community.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We are acutely aware of the climate emergency we all face and aim to consider this in all our work. In October 2022 we had a Carbon & Energy Assessment of our premises carried out by Oxford Brookes Environmental Information Exchange (EiE).

In early 2023 we had new double glazed windows fitted in an older section of our premises, where we previously had single glazed windows with wooden frames in a poor condition.

In the last month our premises have also had solar panels fitted and LED lighting fitted, thanks to some funding we were able to secure. These were both highlighted as energy saving recommendations in the EiE report.

<p>Home-Start Southern Oxfordshire</p>	<p>Ref: SRev25-27/16</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. We are constantly submitting applications for small and large grants and we are confident that we will be able to meet any shortfall.</p> <p>If we are unsuccessful in any of our funding bids, and in order to increase our services to meet unmet demand, we will aim to cover shortfalls in funding by seeking alternative funding with partners, such as other Home-Start schemes, and other trusts and foundations. We will also manage our free reserves to maintain the highest possible level of service to the vulnerable families that we support.</p> <p>In the unlikely event that we can't, we will be forced to adjust our level of services accordingly.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. We will constantly seek new sources of funding and in particular grants of more than one year. We have been fortunate in the past two years in finding this type of funding and are hopeful that this can continue in the future.</p> <p>Our Development Manager, who manages our fundraising, has attended a series of Sustainability Workshops which has helped direct our fundraising strategy. These workshops have helped us focus on funding our core work, rather than lots of projects, to ensure stability for future years. We hope that in securing funding from funders like The National Lottery Community Fund, who are one of the UK's leading funders, and our local District Council, which shows our vital support is valued within the community, it will help us in turn leverage further support and funding from other donors in future years too.</p> <p>Alongside our usual fundraising from grant-giving trusts, we have recently set up partnerships with Active Oxfordshire and local energy provider, SGN, where we have received grants to help vulnerable families (families with young children) become more active and provide families with energy saving advice and tips and carbon monoxide alarms. These are new partnerships and local partnerships like this, which support the work we are already doing, provide a new income streams for us. We would look to do more things like this in future years.</p> <p>We will look into investing in a funding CRM, such as Donorfy, to help build and develop relationships with our donors/supporters.</p> <p>We have also just recruited a Volunteer Development Co-ordinator in order to increase our number of volunteers. They will be looking at the stewardship and development of our volunteers and ways that we can utilise our volunteers to help in other ways, such as holding their own fundraising events for us. Again this would open up a new income stream for us, helping to increase financial stability furthermore.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. During the COVID pandemic, initially we were able to apply for COVID-related funding and we had a surplus in 2020/21.</p> <p>However, in subsequent years a lot of funding dried up and we found it much more difficult to obtain funding to support our services. This resulted in a deficit in 2021/22 and 2022/23 which was depleting our reserves.</p> <p>In 2023/24 we were able to find new sources of funding, although some of them like The Tambour Foundation and The Poor of Didcot Charity grant were one-off grants with no possibility of being repeated. The combined total of these was £48K which gave us a surplus of £26K for 2023/24, which has enabled us to return some of the deficit into our reserves.</p> <p>We have managed to maintain our level of service by using our reserves to fill the necessary shortfalls.</p>	

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Many children do not get the best possible start in life. Without a stable, loving and nurturing environment, young children will not develop the foundations they need. This is important because a child's earliest years are irreplaceable and have a lifelong impact on their prospects, their health and their wellbeing. We work with parents because they hold the key to giving their children the best start in life. By supporting parents to build strong, happy families we improve outcomes for children. The families we support are often on a low-income, some are living in temporary accommodation or poor housing, some are lone parents finding it hard to cope, isolated or families with experience of domestic abuse or low mental wellbeing. We listen to the families and their needs are assessed on referral. We support families in the ways they need via our trained home-visiting volunteers, support groups and Family Support Worker.

Over the last financial year we have supported 121 families across the SODC area across our services. Families are referred to us from other professional services (with the family's consent) or they may self-refer in order to receive support. Referrals are increasing every year, from 90 in 2020 to 126 in 2023/24, especially from local Health Visitors, which shows the need is still there. We had to decline 54 referrals last year due to staff capacity or criteria not met.

We've developed strong relationships with local Health Visiting and Social Care teams, mental health services and educational professionals across the area, so we can work collaboratively to target those most in need. We attend Health Visitor/Family Nurse Partnership locality meetings, where learnings and information on a rise in needs within the community are shared and discussed so that we can work together to address them. We use these multi-agency meetings to shape our work.

Local health and care services tell us that many children have not reached school readiness levels when starting primary school, with delayed language and fine motor skills development, and poor oral hygiene and toilet training. All of these issues can lead to children facing significant barriers in life and can result in poor outcomes. We also recently conducted a local 'shaping our service' online survey for parents with children aged 5 and under. The results showed that 42% were struggling with their mental health, 42% were concerned about their child's speech and language and 32% were concerned about their child's ADHD. 71% also felt they would benefit from support with improving relationships with their children/partner and improving parenting confidence. We can support these needs. We will be using this feedback from local health services and our survey results to shape our groups and volunteer support.

"Anxiety keeps me constantly questioning whether I'm doing it right. It would be nice to have more informal support in the area to help. It's hard to meet other mums in the area so it can be lonely on mat leave" – a parent's comment taken from our survey.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Consultation is on an ongoing basis, with a variety of stakeholders.

Families are involved in shaping the support they receive. All our families supported via home-visiting are consulted at the start of support, during support and at the end of support. The family's needs and level of coping are assessed at an initial visit after a referral and goals are identified. Families 'score' how well they feel they are coping across various aspects of their lives such as their wellbeing and parenting skills. Volunteers complete weekly diary sheets, recording detailed information about each visit made. This allows us to monitor family support and needs. Support is reviewed and the family's progress is assessed at regular intervals by our Family Co-ordinators, which allows us to track improvement and also alter support where needed based on their needs - this is important as the support is aimed at being flexible.

Both family and volunteer are invited to provide feedback on their experience of the support via questionnaires and supervisions.

Our amazing team of 48 home-visiting volunteers sit at the heart of our work. They root us deeply in our communities, make us incredibly cost effective, and create our Home-Start culture. Volunteers are our listening ear and what we learn from them shapes our service. They are involved through frequent

conversations, regular supervisions, peer support days/coffee morning. All this helps us listen, learn and adapt.

We reach out into our community and understand that it takes extra effort to engage vulnerable parents.

Our free parent/child groups enable friendships/community/peer support and provide safe spaces where parents can ask for additional support. We provide registration forms at our groups to assess needs and provide questionnaires to assess how attendees are feeling during their time at the group and gather feedback on the groups.

- Strong relationships with referrers link us to parents in need - health visitors, midwives, schools, social and mental health professionals, community and family nurses, GPs, refugee charities and domestic abuse charities. We listen to the needs at locality meetings and via referrals and respond to meet them and ensure these professional services know to refer to us.
- We have stalls at popular community events particularly those aimed at families and Family Days on Armed Forces bases. We attend smaller events which are free and local as they prove more accessible to parents in deprived/marginalised communities.
- We attend/have stalls at community hubs, schools, international hubs (refugee welcome) to promote our services to those in need/listen to need.
- We attend Team Around the Family (TAF) meetings and Child in Need (CIN) meetings supporting families with complex needs where multi-agencies are involved. This is so we can plan cohesive delivery of support for that family, ensuring the best outcome.

Our families, volunteers, staff and trustees are united by a shared experience of parenthood, which has informed the development and delivery of our service over decades. Our staff team include people who started their journey with us as supported parents.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Equality, diversity and inclusion is integral to our work. In line with Home-Start UK's guidance, we have developed a policy to ensure that our practice has Equity, Equality, Diversity and Inclusion (EEDI) at its core. Home-Start Southern Oxfordshire believes that a culture of equality, diversity and inclusion not only benefits our organisation but supports staff and volunteer wellbeing, which has a positive impact on the service we offer. People who feel comfortable to be themselves contribute to building an inclusive culture for families using the service and for volunteers.

The Home-Start model, of highly flexible home-visiting, is inherently inclusive. Home-visiting removes barriers that travelling to a certain place would create, particularly benefitting those facing rural isolation, severe anxiety or poverty. This helps us reach families marginalised by access, stigma or poverty. We regularly review our data and adapt our practice. Our weekly drop-in parent and baby support group now has an array of nationalities attending; we recently moved this group to a different area of Didcot in a new housing development where the need was greater, with a growing diverse and young community.

We are proud of our inclusive reach. We are proud of the fact that Home-Start support is free and open to anyone. The only requirement is that families have at least one child aged five years or under (but they may have older children too). Being a free service, and also a non-statutory service, means that we can often build high levels of trust in our relationships with families. Our support comes from a place of compassion and non-judgement. Our volunteers support families out of genuine goodwill. We recruit our volunteers from as broad a range of backgrounds as possible and with the recent appointment of a Volunteer Development Co-ordinator, we now aim to increase the diversity of our team of volunteers.

Due to the diverse range of families we support, we are mindful of intersectionality and the experiences and issues that can lead to families facing barriers to getting the help they need. We make efforts to extend our reach to all communities, including families new to the UK facing barriers, such as displaced Ukrainian families, and recently spoke about our support at the local Refugee Welcome 'international café'. Our trained volunteers assist in overcoming these barriers by:

- accompanying families to local outdoor parks and play groups (including our own groups)
- helping with any paperwork/completing forms
- signposting to other services such as baby banks, local food larders and English for Speakers of Other Languages (ESOL) classes.

Our Family Co-ordinators have recently worked with a Bangladeshi family who do not speak English. One

parent could speak Italian so we translated our review/scoring paperwork into Italian, so that we were able to correctly assess how they were coping. We aim to ensure that language barriers do not prevent support to any family and work hard to meet needs of all our service users as they arise.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We will collect quantitative and qualitative data to demonstrate outcomes of the project. We monitor and measure progress from the start of support until the end of support, which enables progress of the family ('journey of change') to be tracked. Using data collected throughout the support, which is stored on our cloud-based CRM system, CharityLog, can then evaluate how our support has helped and we can provide feedback on outcomes and show the impact our support has had, e.g. Out of XX families supported with a home-visiting volunteer, XX% felt there had been an improvement in their mental wellbeing.

Across all our support services, we also collect case studies and testimonials to show the impact Home-Start support has had. At our groups, families complete evaluation questionnaires. We receive feedback and testimonials from referrers too.

Parents benefit in some or all of the following ways (depending on their needs) - which are indicators of success:

- they improve their parenting skills, leading to better relationships within the family
- they become more confident to go out alone with their children, thus gaining independence
- they start to access family activities or services in their local community
- they have more social connections and they feel less isolated
- they are better able to cope with their mental health, leading to increased resilience.

Children benefit because:

- their emotional and mental wellbeing is improved as a result of reduced stress in the family and more consistent parenting
- they experience a wider range of environments and meet more people
- their social development improves as they have more opportunities to play and socialise with other children
- they are taken to routine appointments, e.g. baby health and development reviews, immunisations, dental checks, leading to better health
- they are more likely to be ready for school.

Over the last year, our outcomes for families supported by a home-visiting volunteer show that:

- 84% had improved outcomes for being involved with their children's learning and development
- 70% felt less isolated
- 65% felt better able to cope with parenting in the earliest years
- 64% had improved mental wellbeing.

Over the last year, at our Baby & Me Group:

- 54% of parents at this group reported feeling less isolated
- 71% felt more prepared in meeting their child's social and development needs
- 100% felt their child enjoyed the group.

Over the last year, results from families supported 1-to-1 by our Family Support Worker showed:

- 90% felt better able to cope with the challenges of parenting
- 100% felt less isolated
- 100% had improved mental health wellbeing
- 80% had improved self-esteem

Volunteers benefit by being able to offer and give something back to their community, this is often a stepping stone into further education or employment. We can show success through the training and development opportunities our volunteers have had and through their testimonials.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

300

Please explain how you have determined the number of beneficiaries.

Our beneficiaries are the parents and children in the families we support. Over the last financial year, we supported exactly 289 beneficiaries in South Oxfordshire through our volunteer home-visiting support, at our two support groups and via 1-to-1 support from our Family Support Worker.

We have since redeveloped our drop-in parent and baby support group in Didcot, Baby & Me, and have seen an increase in the number of families attending, including at our new monthly twins session. We also have plans to redevelop our other parent and child support group based in a private room at Didcot Library, so we intend to see an upturn in the number of beneficiaries supported through that group going forward too. Along with the fact that we are trying to grow the number of families we can support with our volunteers over the next few years, by focusing on recruiting more volunteers, we believe a figure of around 300 beneficiaries in the South Oxfordshire area each year going forward is likely.

Please describe who will directly benefit from your services/activities.

100% of our beneficiaries are vulnerable groups as they are families who have young children and are going through difficult times.

These include:

- First-time parents
- Isolated families
- Families new to the area, including refugees
- Lone parent families
- Families with mental health issues
- Families with other health issues
- Families on a low-income or struggling with debt and finances
- Families living in temporary accommodation or poor housing
- Families in social housing
- Families with experience of domestic abuse
- Families with complex needs such as children with ADHD/health issues or where children are subject to a Child in Need (CIN) or Child Protection Plan (CPP)
- Volunteers, of which many are older, retired people.

Our trained home-visiting volunteers, who receive 5 weeks of training plus ongoing training and development, provide emotional and practical support in families homes, helping in the ways the families need e.g. increasing self-esteem/mental wellbeing, helping parents feel better able to cope with parenting in the earliest years, helping families get out of the house and get active or attend baby groups and appointments, signposting to local services such as food banks, English language classes etc. Our Family Support Worker supports the families with more complex issues, such as those with very low mental health, and provides Cognitive Behavioural Therapy and the Family Links Nurturing Programme on a 1-to-1 basis in their homes. Our groups provide safe spaces for parents to meet other parents, share experiences and get advice/signposting from our Group worker and for their babies to socialise and play with other babies.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

We believe Home-Start Southern Oxfordshire brings numerous benefits to the community including vital early years support, improving wellbeing, reducing the burden on stretched health services, being a provision to which other professionals such as teachers, doctors and social workers can refer families, providing volunteering opportunities and helping families build connections within the community. Early help from Home-Start means families are less likely to need support from the council at later stages/reduces need to contact council/other services. Increasing self-esteem and confidence to use local services helps families become more resilient to their situations. We can advise and signpost vulnerable families to use community services such as food banks, community larders etc. and support council-backed initiatives, such as YouMove and Healthy Start vouchers.

Parents may be reluctant to engage with health, education and social care services. Inconsistent care and lack of engagement with services increases the risk of neglect, and the possibility that children may be taken into care. Many children are not in any type of childcare setting and are not exposed to opportunities to socialise with other children. Because parents choose Home-Start support, it means that success in improvement to the family's situation is very likely. Our volunteers and groups provide needed resource.

We fill gaps in local services. Increasingly, the resources of statutory services are focused on the most 'high

risk' families. Although our work does not replace that of Health Visitors, Social Workers or other statutory services, we are able to complement what they do, and provide support for families who fall below thresholds for their intervention. A recent report by Pro Bono Economics shows the effects of reduced spending on early intervention within local authorities and reports that "since 2010-11, spending on early intervention services has fallen by 44%, while spending on late interventions has risen by 57%". As expenditure on early interventions falls, it makes the work of Home-Start ever the more important.
<https://www.probonoeconomics.com/struggling-against-the-tide>

We also support complex families. There is enormous unmet demand for our service with little other parenting support and no other home-visiting service available in South Oxfordshire. Home-Start is supporting unprecedented numbers of complex families at a time when local health services are over-stretched with spiralling caseloads/waiting lists. We can provide Cognitive Behavioural Therapy and Family Links to families who need it now, providing life-long strategies which is future cost-saving.

"Home-Start stepped in when all other agencies and systems no longer recognised me as a mother in need of help." We take over when Health Visitors and specialist perinatal support falls away when a child reaches one, and we compliment services like OXPIP who end therapeutic support when a child is two. "Many therapists refer on to Home-Start for essential support," CEO, OXPIP.

We provide vital preventative early years support. "There are still children in Oxfordshire who go straight onto a Child Protection Plan without ever having had any type of early help support, and that's not OK," Officer, Oxfordshire County Council. Early, effective intervention from Home-Start helps families avoid crisis.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Through 'Supporting Families to Create Better Futures', we aim to reduce isolation, improve mental wellbeing and improve outcomes for children in the critical earliest years, through effective support for parents, across South Oxfordshire. We will deliver these outcomes through our trained home-visiting volunteer support service, our two weekly Didcot-based parent and baby support groups and 1-to-1 support via our Family Support Worker.

The outcomes we aim to deliver through our early intervention and non-judgmental support will be:

- families will feel less isolated
- parents will have improved mental wellbeing
- parents will feel more involved with their children's learning and development.

Regular weekly visits from a volunteer/Family Support Worker or attending a weekly group helps build a parent's self-esteem and confidence. Having someone to talk to confidentially will help a parent's mental health. These boosts will help them become more resilient and gain courage to use local services, helping them feel less isolated. Positive relationships are continually nurtured between parent and child through volunteer visits or attending our groups, with support helping parents feel less overwhelmed. This early help leads to better outcomes for the children.

We collect quantitative and qualitative data to demonstrate outcomes of our support. We monitor and measure progress from the start of support until the end of support, which enables progress of the family ('journey of change') to be tracked. The family's needs and level of coping are assessed at an initial visit after a referral and goals are identified. Families 'score' how well they feel they are coping across various aspects of their lives such as their wellbeing and parenting skills. Families give themselves a score between 0 and 5, where 0 is not coping at all and 5 is coping very well. Any family scoring between 0-3 in a category makes that an identified need for them.

Once family support has started, the volunteer will complete weekly diary sheets, recording detailed information about each visit made. Support is reviewed and the family's progress assessed at regular intervals, which allows us to track improvement. Support is usually for between 6-12 months. When it's agreed support is no longer needed, progress is assessed against the needs identified at referral. We can then evaluate how our support has helped e.g. improved self-esteem or feeling less isolated. This means we can provide feedback on outcomes and show the impact our support has had.

Families and volunteers provide feedback on their experience via questionnaires and supervisions and we collect case studies and testimonials. We can show impact through volunteer testimonials and by highlighting the training and development opportunities volunteers have had access to.

We also measure the impact at our groups and our Family Support Worker's caseload, so can provide similar % outcomes for those services too.

"XXXX was outstanding and supported me for a year! She helped me and my little boy immensely, I cannot thank her enough! We will forever be grateful. I wouldn't have made it you".

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

We work with partners to ensure we do not overlap services, but instead provide additional support for families, often, in fact, filling vital gaps in services. This demonstrates the importance we see in working with other organisations, groups and bodies that are working to strengthen our communities.

Dovetailing with statutory provision and working collaboratively with a wide network of voluntary, community and professional partners, we provide vital support in a space no-one else occupies; our regular volunteer home-visiting service to families is unique. We've developed strong relationships with Health Visiting and Social Care teams, mental health services and educational professionals across the area, so we can work collaboratively to target those most in need and who refer families to us, to improve the health and wellbeing of families with young children. We attend Health Visitor/Family Nurse Partnership team meetings, where learnings and information on a rise in needs within the community are shared and discussed, which helps inform our decisions and service delivery and we can use our volunteers and groups to help disseminate information. Collaboration with local health services has been strengthened through our successful bid to be part of the 0-19 NHS Oxford Health Foundation Trust commission where we aim to improve wellbeing, reduce isolation and help parents cope with the challenges of parenting.

Where children are subject to a Child in Need (CIN) or Child Protection Plan (CPP), our Family Co-ordinators prepare for and attend multi-agency CIN, CPP and Team Around the Family (TAF) meetings to advocate for and support families as appropriate. Statutory agencies value the fact that Home-Start volunteers make weekly visits to families where there are safeguarding concerns, and children are thus 'seen' regularly.

We are part of the Healthy Didcot Steering Group. We also work with local hubs and projects across the district to promote our services to their users/anyone they feel could benefit and for them to refer families to us, such as recently the NOMAD project in Henley and Cholsey Happy Hub. We collaborated with Didcot Baby Monday on our Didcot Powerhouse Fund grant application. We wanted to ensure we were not duplicating services and that we could show our two organisations complimented each other, providing support for families at different stages. Didcot Baby Monday now provide additional tailored sessions on subjects such as baby weaning, baby sleeping and self-care at our weekly parent and baby group. The peer support and peer learning we generate through collaborating is invaluable.

Other community partnerships now include YouMove, run by Active Oxfordshire to encourage physical activity. We work in partnership with them and our district councils to promote its low cost and free activities for families to enjoy together. Access to these activities has historically only been open to those on certain benefits, but now any family supported by Home-Start is able to take part.

Our greatest collaboration is with our families and volunteers. Their feedback during supervisions and when support comes to an end is invaluable to shaping our service.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Our Home-Start Home-Visiting Volunteer Support is our core work and we apply for various funding across a range of grant-giving trusts and foundations to support this service, as well as our groups and Family Support Worker, throughout the year. We also make grant applications to local Parish Councils, Town and District Councils, and other local funders, such as the Oxfordshire Community Foundation.

There are two other Home-Start charities in Oxfordshire, Home-Start Oxford and Home-Start Banbury, Bicester & Chipping Norton, and we work collaboratively to provide an Oxfordshire-wide, aligned service, prioritising accessibility and inclusiveness with a shared vision, culture and Theory of Change. Our charities work across different geographical areas of Oxfordshire but work towards the same outcomes, so all families in the county have access to the same support. By collaborating and working jointly on grant applications, we have successfully received 5-year funding from the Oxford Health NHS Foundation Trust and also 3-year

funding from The National Lottery Community Foundation to fund our home-visiting support service. From working on joint bids during the pandemic, we learnt that despite the difficult circumstances this brought, the consortium not only worked well together but demonstrated resilience and adaptability. We plan strategically, combining knowledge, skills, experience and best practice at regular consortium meetings and shared training events.

We will be working in collaboration with the local energy provider SGN, where we will collaborate to help increase carbon monoxide awareness, distribute CO alarms and share energy saving tips and advice among families with young children. This new collaboration will bring in new funding from a new funder.

By working in collaboration with other services in the area and attending multi-agency meetings to gather learnings on local needs, we can ensure that the services we deliver continue to have an impact on our community. We will focus on our core activities which meet the current needs of families in our area, rather than develop new projects. To ensure our support is sustainable, we ensure that it is not funded from just one source, thus providing long-term financial sustainability and we plan to continue doing this. Eventually we would like to bring in more community fundraising and corporate fundraising e.g. 'Charity of the Year' partnerships to open up more funding streams. We have had some corporate fundraising from local companies in Didcot such as The Body Shop and M&Co in the past and will be looking to establish new partnerships in the coming years.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Our trustees and management team will be working on an Environmental Policy soon. Our charity recognises the serious and accelerating changes to the world caused by climate change and are working hard to reduce our carbon footprints. We believe that businesses should be responsible for achieving good environmental practice and operating in a sustainable manner. We will seek to minimise our negative impact on the environment and use our resources in a way which supports and promotes positive action for the environment.

Grass roots service minimises climate impact. We train local volunteers who are matched with local families, enhancing community wellbeing, but keeping travel to a minimum. Staff can work flexibly from home, which minimises travel time and virtual meetings save on travel altogether.

In our office, staff separate refuse waste from recycling, are encouraged to print documents only when necessary and to print double-sided to save on paper. We are increasingly paperless. We use SharePoint, a cloud-based system, to save documents and work, rather than print and store hard-copies. We favour digital communications. We reuse and offer play resources for our volunteers to utilise with the families they support and promote 'everyday' play resources over bought items.

We signpost families to utilise food larders who distribute surplus food and fruit and veg, helping families enjoy more veg-based meals. We also offer referrals to the local food banks, contributing to helping reduce food waste.

The majority of the activities that our volunteers do with the families they support have a very low environmental impact, such as walking to the local park, library or local play group.

We will also be working with local energy provider SGN to provide energy saving advice and distribute carbon monoxide alarms to the families with support over the next two years.

<p>Sue Ryder Palliative Care Hub South Oxfordshire</p>	<p>Ref: SRev25-27/22</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. Each quarter we invoice NHS Oxfordshire for £243,509 to run the service, with the shortfall being made up from fundraised income.</p> <p>Fundraising to cover remaining costs will be ongoing. We have a fundraising team based locally who work with the community to secure funding, as well as national teams that secure funding through avenues such as national events, major donors or trusts. Sue Ryder’s financial strategy is to continue to invest in the coming years to grow public awareness of the charity and to ensure we create sustainable income streams to help deliver more care to more people. We have a retail network of nearly 400 shops as well as our retail presence online and in recent years, sales have consistently outperformed expectations. Our fundraising strategy includes growing both in and out of the footprint of our care centres to raise the vital funds required to fill our funding gaps. Fundraising income represents around 30% of our total income, with our largest single income source from legacies followed by the efforts of our Community Fundraising team.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Last year, Sue Ryder launched its new five year vision and strategy, “A better approach to dying and grief”, which aims to make sure everyone approaching the end of their life or living with grief can access the support they need. Alongside Sue Ryder’s new five-year strategy, the charity has launched an Income Growth foundation strategy which will oversee the delivery of activities and initiatives to grow our fundraising, retail and commercial income which will help us to achieve our vision. Some of the ways in which we will improve our financial stability over the grant period and generally in the future includes:</p> <ul style="list-style-type: none"> • Investing in the national trusts and foundations team by growing the size of the team. This will allow us to make applications to more charitable trusts and foundations which could support our existing services as well as new strategic areas such as growing online bereavement counselling. • Focusing on recruiting more supporters to our Sue Ryder Lottery, which gives people the chance to win cash prizes while all profits from the Lottery go towards helping us to provide more care for more people. • Investing in our Friends of Sue Ryder programme, which sees people go the extra mile by supporting us monthly. In recent years, thousands more Friends have set up a regular donation to fund our work. • Continuing to grow our portfolio of corporate partners. During 2023/24, Lloyds Bank supported Sue Ryder with a ‘Sustainable Fashion Show’ which raised over £70,000 and the charity entered a new major partnership with leisure group, Village Hotels. • Marketing, communications and digital services teams integrating and collaborating even more closely with our fundraising teams to align our brand with fundraising. • Continuing to progress our retail vision, Retail 2025, aiming to find creative and innovative ways to use more of what is generously donated to us. An important focus during 2023–24 was helping people shopping at Sue Ryder to live more sustainably. We want to inspire everyone to reduce, reuse and recycle to help make sure the planet – and everyone on it – can be cared for. 	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. Despite the achievements in our palliative care services, and the generosity of our supporters including South Oxfordshire District Council, Sue Ryder continues to face some significant financial challenges,</p>	

including inflationary pressures.

Our reserves are stable but hospice funding has historically not risen in line with inflation and this has been brought starkly to light during the high inflation environment of recent years. In the last year alone, Sue Ryder has seen around a 10% increase in the cost of keeping our palliative services running. This is not reflected in the Government funding we receive to deliver these services, which has increased by only 1% each year, on average. Examples of cost pressures facing Sue Ryder include:

- Since 2022 we've seen a 20% increase in the wage bill in our services in order to keep pace with NHS and the National Living Wage;
- The charity's energy costs last year were £1.9m and this year are predicted to be £2.3m. The roll-out of LED lighting across our retail and palliative care centres (where they don't already have this) is helping to mitigate some of the rise in energy bills and usage but costs are still rising;
- The need to increase our spend on IT to ensure the charity is not at risk of cyber-attack or fraud attempts. We've seen a number of NHS trusts suffer attacks in recent years and while we want to prioritise funding on services, we know we must not further delay investment in our IT infrastructure.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

In April 2018, in consultation with the Oxfordshire Clinical Commissioning Group (CCG), Sue Ryder launched the South Oxfordshire Palliative Care Hub. This created the first Hospice at Home service in the area, providing specialist end of life care to people in their own homes, supported by a single point of contact telephone number. Through our long established presence in South Oxfordshire, Sue Ryder has first hand data showing an increase in demand for care, with the number of local people supported by Sue Ryder increasing from 448 in 21/22 to 499 in 22/23 and 603 in the 23/24. Data previously obtained by Sue Ryder from the Marie Curie Atlas, shows that the estimated number of people in need of home based palliative care is now around 1,500, while research by Sue Ryder from 2022, found that three quarters of people (74%) would want to receive end-of-life care at home. Demand for palliative care services is projected to rise from 245,000 in 2021/22 to 379,000 in 2030/31 assuming a steeper increase in demand (the most likely case) and to 271,000 in 2030/31 assuming a flatter increase in demand. Please see uploaded evidence, Sue Ryder "Modelling Demand and Costs for Palliative Care Services in England" Report, London Economics, 2021.

This project will take an extremely flexible approach to addressing on-going community need. Our nurses provide care for people facing a frightening, life-changing diagnosis. It's more than expert medical care; we also offer emotional support and practical help. We do whatever we can to be a safety net for our patients, and their loved ones, at the most difficult time of their lives. Our nurses and healthcare professionals are medically trained to relieve any pain and discomfort that a patient is experiencing, whilst remaining to be cared for at home. A visit from one of our nurses, on average 1-3 times per day, can make a huge difference to the patient both physically and emotionally. Not only do we provide support for the patient, we also go above and beyond to relieve any anxiety and provide support for those who are caring for them.

Originally, our Hospice at Home service was mostly limited to the hours of 8am-8pm. However, in last couple of years, in response to evidenced demand, Sue Ryder has been able to recruit new members into their team, who work through the night between the hours of 10.00pm-7.00am, so families can rest safe in the knowledge their loved one is being expertly and compassionately cared for. By providing a Nursing Assistant to make visits throughout the night, we can give personal care and support, so that patients are as comfortable as possible. This respite care service now allows the family to find time to rest and sleep so they are recharged for the following day. Again, this is evidence of our flexible and supportive approach to addressing on-going community need.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

At Sue Ryder we believe that service users have a unique contribution to make as they are experts by experience in addition to any other skills, qualities or knowledge they have. Their voices, experience and support, shape and direct our activity across health and social care: this is evident in our approach to quality improvement and in our influencing and policy work. We recognise the need to include service user

participation to all areas of our work such as recruitment, service planning and delivery, and assuring the quality of our services.

Through our service user participation strategy, Sue Ryder is committed to ensuring service user participation is embedded throughout our services. It sets out our objectives, plan and measures for the participation of service users across Sue Ryder. There are many excellent examples of how we currently engage our service users:

- Regular local user group meetings at our care centres are where service users and carers meet with management teams to focus on and discuss key activities and projects to improve our local services. Service users are also invited to join the Quality Improvement Group meetings.
- Real-time feedback has been implemented across all our services. This allows the Senior Management team to review the feedback in “real-time” and address any issues or concerns in a timely way.
- “You said, we did” boards are displayed in our care centres and hospices and clearly explain the improvements we have implemented as a result of service user feedback.
- Surveys, comment cards and complaint reporting actively seek feedback from all our service users and families. All the feedback received is used to drive improvements in the care we provide and the services we deliver.

This year, Sue Ryder has introduced a new role - Community Engagement Coordinator - to support our provision in the Sue Ryder Palliative Care Hub South Oxfordshire. This post holder will help Sue Ryder to increase the reach of our local palliative and bereavement services into all demographics of the local population, helping to ensure services meet individuals ongoing needs. They will be embedded within the local community to bring the voice of those people into Sue Ryder and to help connect those using Sue Ryder services with the right people and organisations that will provide them with the right support.

As an example of Sue Ryder's consultation and collaboration with colleagues across the palliative and end of life sector, including voluntary, community and social enterprise sector leaders, please find uploaded a summary paper ‘Enablers for end-of-life care: Key recommendations for commissioning and delivering better end-of-life care within Integrated Care Systems’. Published in 2022, contributors included: Katharine House Hospice, Hospice UK, Arthur Rank Hospice Charity, Forest Holme Hospice, Cransley Hospice Trust, Keech Hospice, The Kirkwood Hospice, Macmillan Cancer Support, Willen Hospice and others. The key recommendations that emerged were centred around four themes: funding and commissioning; workforce: retention and pay, education and training; collaboration within the system; and health inequalities, cultural awareness and minority groups.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Sue Ryder's Board of Trustees and the Executive Leadership Team of Sue Ryder are fully committed to the Equity, Diversity and Inclusion strategy it launched in 2021, with the ambition to have an environment that is equitable, diverse and inclusive for our staff, volunteers, service users and supporters, present and future. We believe that everyone at Sue Ryder is equally important, that we should celebrate diversity and the value it brings, and that everyone should feel they belong. We strive to be an organisation that champions equity and create an inclusive culture; where there are no barriers to colleagues realising their unique potential; and where every individual feels valued, respected and accepted. Sue Ryder has an Equity, Diversity and Inclusion Group and four growing special interest networks:

- Network for Ethnic Diversity and Equity
- People with Disabilities
- LGBTQ+
- Women and Non-Binary Individuals.

Since 2021, we have launched a number of initiatives including:

- Inclusion Passport - designed to help Sue Ryder colleagues thrive at work and explore their own needs in order to guide honest and supportive conversations with line managers; making them aware of anything that is going on in their life that might require workplace adjustments.
- Race Equity Programme - led by independent culture change experts New Ways.
- Rainbow Badge scheme - we want to promote a better understanding of LGBTQ+ inclusion and make LGBTQ+ experiences more visible across our organisation. Last year we introduced the

Rainbow Badge scheme - colleagues and volunteers can now complete a short online learning course or make a supportive pledge to obtain a badge

- We run regular masterclasses covering topics such as Hidden Disabilities, Inclusive Leadership, Multigenerational Workplaces, Faith at Work as well as encouraging all colleagues to attend Black History Month celebrations.

Last year Sue Ryder launched its long-term vision and strategy "A better approach to dying and grief". As well as supporting more people through our services, information and resources, a vital part of our vision and strategy is equity of access. We want to break down barriers so that people from all communities can access high-quality, culturally relevant palliative care and grief support. In the delivery of the programme, we will work with both service users and the people and communities who are not currently accessing our services.

XXXX is Sue Ryder's new Head of Health Inclusion and Equity at Sue Ryder. XXXX commenced her role in January 2024. XXXX's role at Sue Ryder was created in response to health inequalities identified through Sue Ryder's self-analysis, and national reports illustrating the lack of access by diverse communities. To ensure that our project meets the needs of all users, including vulnerable/priority groups, XXXX will work closely with the Sue Ryder's Community Engagement Co-ordinator for South Oxfordshire, whose role will be to engage with local communities and bring their voices back to influence our service delivery.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

In our care centres and in line with national health and social care priorities, we deliver the highest quality of patient safety and clinical effectiveness and ensure the highest level of compassionate care. We do this through internal and external monitoring which includes:

- Individual care plans - created in partnership with patients and their families to make sure the care we deliver is tailored to their needs, allowing us to identify what's important to them and support their decisions.
- Our Quality and Governance Team - this is made up of experts in clinical governance, quality improvement, research and education and they lead on our ongoing quality improvement initiatives, supported and delivered by local quality improvement groups at each of our centres.
- An annually published Quality Account - this reviews our performance against selected measures and sets out our initiatives and priorities for the coming year.
- Inspections carried out by the Care Quality Commission - several of our care centres are currently classed as Outstanding.
- Actively asking for feedback through patient and family surveys, service user participation groups, working closely with local communities and listening to the needs of people from different cultures and backgrounds and acting on real time feedback.
- After a patient's death we ask their families to complete a short, non- intrusive survey to ensure we are operating in ways that reflect the best interests of our beneficiaries. We monitor a range of quantitative measures as part of our monthly service performance reports. These include preferred place of death compared to actual place of death.

Sue Ryder has a Community Engagement Co-ordinator, based in Wallingford, OX10. They will work alongside representatives from specific communities including vulnerable/priority groups, seeking to understand end-of-life priorities for these communities and the barriers and challenges they face in order to identify opportunities to break down inequalities. The Community Engagement Co-ordinator will capture evidence of progress and report this back to Sue Ryder's Head of Health Inclusion and Equity. These metrics will also be shared with South Oxfordshire District Council during monitoring meetings.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

500

Please explain how you have determined the number of beneficiaries.

Sue Ryder has robust evidence that our project will benefit 500 each year. After the service first launched we built up the number of people supported a year to just under 500, during 2020 this dropped to just over 400. Since this time the number has again risen and in 2022/23 we supported 499 people and last year, we supported 603 people. We are therefore confident that 500 people will benefit and will aim to exceed this number if possible. Metrics concerning the number of South Oxfordshire residents using the service are taken from Sue Ryder's database. Once the project is up and running, information will be shared with the Council through monitoring reports and meetings.

We are confident of the growing need for hospice at home nursing care. Data previously obtained by Sue Ryder from the Marie Curie Atlas, shows that the estimated number of people in need of home based palliative care in South Oxfordshire is now around 1,500, while research by Sue Ryder from 2022, found that three quarters of people (74%) want to receive end-of-life care at home. Demand for palliative care services is projected to rise from 245,000 in 2021/22 to 379,000 in 2030/31 assuming a steeper increase in demand (the most likely case) and to 271,000 in 2030/31 assuming a flatter increase in demand.

Please describe who will directly benefit from your services/activities.

The Sue Ryder Palliative Care Hub South Oxfordshire supports people 18 and over who have an end of life diagnosis. Included in this group are the elderly, individuals with disabilities or comorbidities, and those with impairments. Last year, Sue Ryder's community nurses and healthcare teams provided crucial support for thousands of people, of which 40% were 60+ years of age and 47% were aged 80 years and over.

However, as our services are available to everyone in the area our patients could come from any of the groups listed above. When patients are referred to our services, our staff draw up a care plan, which generally involves home visits by our nurses to provide care and monitor the patients situation, bringing in additional support from doctors if needed.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

One of the key goals of hospice care in the community is ensuring that unplanned hospital admissions or doctor visits are reduced. Our nurses and doctors are able to provide support that means our patients are well cared for and any issues they are having, whether that is pain management or illness progression can be caught and dealt with early. It also means that our patients are able to pick their preferred place of death and plans can be made accordingly, indeed 96% of our patients achieve their preferred place of death. Overall this means that council intervention is needed far less often, and there is a reduced cost to provide care across the board.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

A key way that our service contributes to the Thriving and healthy outcome of the corporate plan is that it can greatly reduce loneliness and isolation in our patients and their families. Without a dedicated hospice and home service in the area many people feel trapped in a cycle of hospital or hospice trips in their last weeks and days, while their family may feel like a carer instead of a spending quality time with their loved ones. Feedback we've received from patients and families consistently mentions how much the nurse's visits improve their mental wellbeing, allowing them to focus on spending time doing what they want to do instead of worrying about their illness.

In addition to this, our nurses are trained to recognise the signs of deteriorating mental health, and can then refer them to other support services such as social workers, pre and post bereavement support and befriending, to ensure a holistic care plan can be offered.

Sue Ryder's Hospice at Home service in South Oxfordshire now includes a Night Respite Care Service which helps to ease our patients' and/or their loved one's anxiety about being alone at night, and therefore helps to stabilise sleeping patterns and improve the quality of overall sleep for both parties. Our Nursing Assistants provide care throughout the night and attend to any needs and take on of any tasks usually performed by a relative or care giver. This includes support with administering medication through the night, assisting with toilet breaks and getting in and out of bed, regular help for changing position in bed, particularly after an operation or injury, and help with complex care needs. The Sue Ryder night sitting service provides relief, support and professional care to the patient and families. Not only do they enable

families to take some rest, supporting their wellbeing and mental health, it also provides reassurance, that if symptoms worsen or pain increases, there is someone available, who knows what to do and when. The nights are not so long and lonely, and there is comfort that your loved one will receive the care they deserve and need.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Over the course of the project, 1,000 people will receive thousands of hours of expert and compassionate care, this will be delivered as a routine part of the Sue Ryder's business plan and culture. We are working in partnership with Buckinghamshire, Oxfordshire and Berkshire West ICB as well as local organisations to deliver a cost-effective, streamline service. The Hospice at Home team collaborate very closely with local services to ensure a seamless continuity of patient care. Our aim in all we do is to work in partnership to ensure gaps in care are filled.

These include:

- Joint working with District Nursing and Community Teams;
- Work with Primary Care teams to identify patients and manage patient care;
- Co-ordination of care throughout the night;
- Delivering end of life care training and supporting patients referred to South Central Ambulance Service (SCAS NHS 111) out of hours;
- Providing crews with advice and a response service where needed (SCAS NHS 999).

In addition to the above we offer specialist advice Wallingford Hospital to help them provide palliative care beds under our supervision, providing extra options for people in the community in need of care.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Last year, Sue Ryder launched its new five-year vision and strategy, "A better approach to dying and grief", which aims to make sure everyone approaching the end of their life or living with grief can access the support they need. Alongside Sue Ryder's new five-year strategy, the charity has also launched an Income Growth foundation strategy which will oversee the delivery of activities and initiatives to grow our fundraising, retail and commercial income which will help us to achieve our vision. In order to develop our service in collaboration with others to become more financially sustainable in the future, Sue Ryder will:

- consider ways to work with other local and national voluntary, community and statutory groups and organisations to share good practice, resources such as work spaces, and potentially apply to funders for services and new joint projects;
- continue to grow our portfolio of corporate partners. During 2023/24, Lloyds Bank supported Sue Ryder with a 'Sustainable Fashion Show' which raised over £70,000 and the charity entered a new major partnership with leisure group, Village Hotels. The Sue Ryder Corporate team have also just marked a £100,000 income target milestone, with maintenance company, HomeServe.
- foster ways for Sue Ryder's Marketing, communications and digital services teams to integrate and collaborate even more closely with the fundraising teams to align our brand with fundraising;
- continue to progress our retail vision, Retail 2025, aiming to find creative and innovative ways to use more of what is generously donated to us. We want to inspire everyone to reduce, reuse and recycle to help make sure the planet – and everyone on it – can be cared for. For instance, our Sue Ryder shop teams have done an impressive job of reducing the number of sales of plastic bags, resulting in an 85% overall reduction in plastic bag sales in 2023-24 compared to the previous year. During the same period, we instead sold 136,000 £1 branded recycled bags, saving 408,000 plastic bottles from landfill and raising valuable donations.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

As an organisation Sue Ryder is committed to act responsibly and to become a truly ethical and sustainable organisation financially, operationally and environmentally. For Earth Day in 2023, Sue Ryder's committed to reach net zero by 2035 on our scope one and scope two emissions and achieve net zero by 2050 for our

scope three emissions. Scope one emissions are direct emissions, created by burning fossil fuels, from our machinery, facilities and vehicles. Scope two emissions are indirect emissions associated with the burning of fossil fuels to generate the electricity that we use across our organisation. Scope three emissions are all other indirect emissions, such as purchased goods and services (including products we buy to sell in our shops), waste disposal, deliveries and collections, as well as building maintenance and construction. In February 2024, over 700 Sue colleagues shared their feedback in our first ever staff sustainability survey. Those results are helping to inform our work to create a Sue Ryder sustainability strategy. In April 2024, consultants at Bioregional began working with Sue Ryder to support our sustainability strategy development. Previously, Bioregional were involved in supporting Sue Ryder with a sustainability framework to help us start our sustainability journey.

As only around one third of the cost of running our palliative services comes from statutory funding, Sue Ryder relies on the generosity of our supporters through fundraising activities and we have 386 shops across England, Scotland and Wales. Accordingly, many of the immediate actions Sue Ryder is taking to address climate change are linked to our charity shop retail operations.

Key highlights from the last year which demonstrate how Sue Ryder is taking action to tackle the climate emergency and promote nature recovery include:

- Continuing to work with waste management company, Veolia, to review our carbon footprint and separate waste more effectively. For example, by adding cardboard-only bins to our shops, to prevent cardboard being mixed into general recycling bins.
- Stopping sourcing items for retail goods direct from China and dealing mostly with UK-based companies.
- Moving to electric vehicles in our company car fleet.
- Moving to LED lighting in our shops.
- Working with Lloyds Bank, we have started exploring the benefits of their 'green buildings' tool, to support our sustainability agenda.
- Developing upcycling and repair workshops, bringing new life to unwanted items and saving them from landfill.
- Adopting the 'One Planet Living' framework supporting sustainability.

With regard to the specific project we are applying to South Oxfordshire District Council for, we recognise that travel by our nurses will be essential to visit patients and the only realistic way of doing this is by car. However to offset this Sue Ryder is committed to stopping all non-essential travel wherever possible across the rest of our organisation.

Oxfordshire Play Association	Ref: SRev25-27/35
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. Based on current information and plans we are forecasting a small surplus for both financial year 2025/26 and 2026/27.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. We deliver a range of different projects and services rather than relying on just one, this means that our income is diversified through a wide range of different funders rather than just relying on one main funder. This means that our income remains stable. We work to a business / action plan which confirms which projects and activities we will deliver in each financial year. We are also working very hard on increasing our levels of self generated / unrestricted income, this includes increasing donations (our previous SODC revenue grant paid for an IT upgrade which includes a 'donate' button on our website), membership of local Council Lotteries (including SODC Lottery), a revamped Playbox Equipment Hire Catalogue and increased levels of chargeable, Outreach work</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. For the financial year 2020/21 (Covid Year) we recorded an annual loss of £13,591 as we were unable to deliver any projects or services for the majority of that period. In the 3 financial years since then (2021/22, 2022/23 and 2023/24) we have recorded a small annual surplus each year as our projects and services returned to normal. We have also been able to return our Unrestricted Reserves back and above to pre Covid levels. All of our project work offers our Key Selling Point of free entrance and free activities and as this clearly links into the issues experienced by our service users we have been able to secure funding for various projects and services to help Children, Young People and their Families during the Cost of Living Crisis. This has meant that our income has remained stable / increased and we have actually been able to increase the range and number of projects and services that we are able to offer.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. Although South Oxfordshire does not contain any electoral wards that appear in the most 20% deprived nationally when using the Indices of Multiple Deprivation as Oxford City, Cherwell and the Vale of White Horse do there are still 'pockets' of deprivation across the District Both Berinsfield and Didcot South East have various needs clearly identified in the Community Insight Profiles and the Healthy Didcot / Didcot Garden Town information For example Berinsfield has 21% of Children Living in Poverty compared to an average of 11% across Oxfordshire while 28% of Pupils in Berinsfield are eligible for Free School meals compared to 16% across the County South Oxfordshire also has a large Armed Forces Community with Vauxhall Barracks and RAF Benson.</p>	

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

At each location where we deliver an event we work in close partnership with groups and organisations working in that area to ensure that we are meeting LOCAL need with LOCAL People, this will include representation from both the Statutory and Voluntary Sectors

We do not have the capacity or resource to engage or consult individually with local residents at each event so we work with other partners who are able to do this and use their feedback and knowledge accordingly = LOCAL need for LOCAL people

Our list (non exhaustive) of local partners will include (but not limited to) Relevant District, Town or Parish Council, Relevant Council Teams (eg Sports Development, Arts, Neighbourhood Team), Local Childrens Centre (Statutory or Community run), Housing Associations, Armed Forces, Schools & Colleges, Local Service Delivery Organisations, Community Clubs & Groups (including Sports Clubs), Uniformed Groups (Scouts, Cubs, Beavers, Guides, Brownies, Rainbows, Air, Army, Sea & Fire Cadets etc), Churches & Faith Groups, Health Teams (Public Health, Smoking Cessation, Community Dental Services etc), Emergency Services (Police / PCSO's, Fire and Rescue Service, Ambulance Service etc) and Libraries

As practical examples we worked with the following in planning for Berinsfield Playday 2024 = Berinsfield Parish Council, SODC Active Communities Team, SOHA Housing, Berin Centre and Berry Youth Centre

We also work with wider partnerships to ensure that we are 'in contact' with all the local providers in a specific location, as an example we are members of the Healthy Didcot / Didcot Garden Town steering group, this group has enabled us to meet and engage with other organisations who can be involved in our project / events and gives us access to data and evaluations on a local basis

We also work in close partnership with XXXX, the Community Development Officer at RAF Benson and XXXX the Welfare Officer at Vauxhall Barracks to ensure that we are meeting the needs of local Armed Forces Families and more importantly that they are aware of our projects and events

SOHA Housing are a key supporter and partner for our projects and events and in addition to working with XXXX, the Resident Involvement Manager at SOHA we also work and engage with the individual Locality Leads who have real, in depth knowledge of their individual areas to include XXXX in Henley, XXXX in Wheatley, XXXX in Didcot and XXXX for Berinsfield & Benson.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

All of our projects and services are offered with FREE Entrance & FREE Activities to ensure an inclusion for all.

All of our projects and services are delivered within Communities at local locations to give access for all.

All of our projects and services are available to ALL service users irrespective of race, religion etc to ensure all can attend.

(The only restrictions we ever apply are age related, for example our Junior Youth Club sessions are for Year 6, 7 and 8 Children, our Stay & Play sessions are designed for Pre Schoolers (delivered in school hours)).

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We will measure our project outcomes and record them in the following ways:

- Number of people attending each event
- Number of local people and organisations involved in the planning and delivery of each event
- Number of local organisations represented at each event
- Questionnaires completed with guests at each event
- Post event feedback via Social media, e-mail
- Post event feedback from activity providers
- Increase in service users, members of local organisations, reductions in anti-social behaviour post event.

Direct community benefit and inclusion

<p>How many people will benefit from the services/activities provided by this funding on average each year? 5,000</p>
<p>Please explain how you have determined the number of beneficiaries. We have previously delivered over 160 Playday events since 2012 and our average attendance figure is in the region of 1000 Children, Young People and their Families at each event</p> <p>We plan to deliver 5 events in 2025 and 5 in 2026 with a target attendance of 1,000 at each.</p>
<p>Please describe who will directly benefit from your services/activities. Our main beneficiaries are Children, Young People and their Families (in particular Pre School and Primary School aged Children)</p> <p>Our events do not offer Childcare and as such we are able to offer support, advice, signposting and guidance to parents / carers around our key aims and objectives and in particular around improved Physical and Mental Wellbeing while their Children are taking part in our fun, but educational activities</p> <p>Our activities offer a 'Health by Stealth' approach where the Children & Young People undertake fun activities underpinned by serious messages around Physical and Mental Wellbeing, for example we offer a Smoothie Bike activity, the children pedal a converted bike (Physical Activity) to make a Fruit based Smoothie (Healthy Eating)</p> <p>By offering our unique selling point of free entrance & free activities and by delivering events at multiple, local locations (doorstep opportunities) we aim to ensure an Inclusion for all.</p>
<p>Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council. SODC emerging Corporate Plan priorities</p> <p>Action on Climate Change and Nature Recovery - Many of our activities promote Recycling, Upcycling and engaging with Nature. As examples Art Avalanche offer Junk Modelling where the Children use items destined for landfill to create Art, Groovy Su uses old clothes destined for landfill to create scarves, belts, hats etc. We work with Muddy Feet and other groups Promoting Forest School and other nature based activities encouraging Families to respect and use our natural environment</p> <p>Inclusion and accessibility - Our project / events are delivered in the heart of the Communities we serve offering 'doorstep opportunities' in an outdoor setting which brings Communities together, our unique selling point of offering both free entrance and FREE Activities to ensure an Inclusion for all means that all members of the local Community can take part</p> <p>Thriving and Healthy Communities - Wherever possible we use local groups and activity providers to not only support local organisations but also promote these groups (including lots of local Charities) to a wider audience to increase their number of service users / customers. The key aims of our project / events is to Improve Physical & Mental Wellbeing and in addition offering lots of different activities at our events to promote this we have a presence from Healthwatch, NHS Health Checks, Smoking Cessation etc</p> <p>By promoting lots of local groups and organisations we hope that the levels of service users and beneficiaries of these groups will increase, this means that more people will have access to early intervention and prevention. Research and Evidence shows that the biggest cost and pressure on Council services is when Early Intervention and Prevention are not present and available and Councils have to step in as a 'last ditch intervention' which is far more costly and time consuming.</p>
<p>Emerging Corporate Plan priorities, outcomes and collaborations</p> <p>Emerging Corporate Plan contribution: Thriving and healthy communities</p>
<p>What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for? Delivery of 5 FREE Community Playday Events in 2025</p> <p>Delivery of 5 FREE Community Playday Events in 2026</p>

Minimum of 5 Local Organisations involved in the planning and delivery of each event

Minimum of 3 Activities at each event promoting Recycling, Upcycling or Playing in Nature

Minimum of 15 total activities at each event promoting Improved Physical and Mental Health or showcasing local delivery organisations.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Listed below are the partners that we have worked in collaboration with for previously delivered events (this would continue and be expanded for future events) in both the planning and delivery of our Playday project

(NB This does not include local providers attending events to deliver activities but those in involved in the planning and delivery of each event)

Benson / RAF Benson = Benson Parish Council, RAF Benson, SOHA, Benson Youth Football Club, Oxfordshire County Council, SODC

Berinsfield = Berinsfield Parish Council, SOHA, Berin Centre, Berry Youth Club, Oxfordshire County Council, SODC

Didcot / Vauxhall Barracks = Didcot Town Council, Vauxhall Barracks, Didcot Garden Town / Healthy Didcot, SOHA, GLL / Better, Oxfordshire County Council, SODC

Henley = Henley Town Council, SOHA, NOMAD Youth Project, AFC Henley, Oxfordshire County Council, SODC

Wheatley & Holton = Wheatley Parish Council, Holton Parish Council, Maple Tree, Howe Trust, Asda, Oxfordshire County Council, SODC.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

As an organisation we are not large enough to deliver a series of 10 to 15 Community Playday events on our own each year in addition to delivering our numerous other projects and services

This is why working in partnership with others is vital in helping us deliver our work across Oxfordshire and within South Oxfordshire

Working in partnership helps us:

- Increase our delivery capacity / extend our reach
- Reduce duplication
- Share Best Practice
- Ensure that we are meeting LOCAL need with LOCAL people.

This approach also helps us attract and identify funding sources to help pay for our Playday project in particular which is mostly funded by local Grants and Trusts, Councils and Housing Associations

This has meant that we have been successfully able to deliver multiple, FREE Community Playday events across the County and South Oxfordshire since 2012 in addition to funding and maintaining the rest of our projects and services.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We currently rent our office and everything (utilities, cleaning, maintenance etc) is included in our rent, therefore we do not have any direct control over these matters in terms of choosing environmentally friendly providers.

We are currently researching the possibility of purchasing a 'work' van as we currently spend in excess of

£2,000 per annum on van hire - we would welcome any support from the Council in researching and choosing an electric vehicle / van.

Many of the activities that we (and 3rd party providers) deliver, especially at Playday events are designed to promote Recycling, Upcycling and Playing and Engaging with Nature - this has 2 huge benefits, (1) in the current cost of living crisis it helps Families play on a 'budget' and (2) it helps raise awareness of the climate emergency / again we would be happy to work with SODC on how we improve and expand this work.

Thomley Hall Centre Ltd	Ref: SRev25-27/17
<p>Financial Review</p> <p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p> <p>Thomley will cover the funding shortfall in this application (Y1: £255,736; Y2: £270,634) through its diverse mix of fundraising and trading activities. Our projected income mix is as follows:</p> <ul style="list-style-type: none"> • 34% Trading Activities • 33% Trusts and Foundations Fundraising • 19% Visitor Memberships and Fees • 8% Community Fundraising • 4% Statutory Fundraising • 2% Corporate Fundraising. <p>2024 is projected to be the first year in Thomley’s history that income from trading activities overtakes our income from trusts and foundations.</p> <p>Income from trading activities has grown steadily since the end of the pandemic:</p> <ul style="list-style-type: none"> • YE 31 Dec 2020: £61,088 • YE 31 Dec 2021: £109,664 • YE 31 Dec 2022: £176,829 • YE 31 Dec 2023: £198,343. <p>One of the goals of our ‘Survive, and Thrive’ strategy (2021-2024) has been to create new revenue-generating services (both charitable and commercial; working in partnership where possible) to diversify our income and reduce our dependency on grants to fund our core services and activities. To realise this strategy, we have completed numerous site developments and launched new services and programmes over the past four years including the following:</p> <ul style="list-style-type: none"> • Developing a suite of seven Serviced Offices in underutilised space in our main building • Building three camping pods and launching an overnight, short-stay service for families • Creating an outdoor camping area with five pitches (each with its own BBQ and electrical hookup) and bell tents that can be hired and pitched before visitors arrive • Converting a disused barn into a Carpentry Workshop, now under a long-term lease by a local social enterprise • Renovating space to create a classroom for the Thomley Achieve Life Skills programme at Thomley (launched September 2021) for young people with disabilities • Installing an Eco-Friendly Interactive Water Feature (supported by SODC Capital Grant and SODC Rural England Prosperity Fund) • Building an Eco-Woodland Outdoor Adventure and Learning Centre (supported by SODC Capital Grant) • Securing funding to install PV Solar, EV/PHEV Charging Points and E-Bike Charging Points (supported by SODC Rural England Prosperity Fund). <p>All of the completed developments are driving growth in visitor numbers and generating income for the charity that is being reinvested back into its core services and programmes.</p> <p>Only 20% of Thomley’s income comes from visitor fees and memberships. In effect, the charity heavily subsidises the full cost of its programmes, services and activities. The more visitors who demand our services the more income we need to generate. We cannot recoup increasing costs through increased prices, because 70% of our visitors are on benefits and we are committed to making Thomley affordable and accessible for everyone from South Oxfordshire who would benefit.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p> <p>Thomley continues to follow its ‘Survive, Adapt and Thrive Strategy’ (2021-24). Major site developments completed in 2024 (Eco-Friendly Interactive Water Feature; Eco-Woodland Outdoor Learning and Adventure</p>	

Centre (funded by South Oxfordshire District Council) are projected to increase annual attendance to Thomley by 10% in 2025 and 2026. Funding secured in 2024 for Solar PV, EV/PHEV Charging Points and E-Bike Charging Points will help the Charity reduce its energy costs. Providing charging points (to be installed in 2025) will make Thomley more accessible for visitors and continue to drive growth in visitor numbers.

Increased visitor numbers will generate additional income for the Charity through memberships and fees; café sales and catering; camping pod and outdoor camping area bookings; enrolment in the Thomley Achieve Life Skills Programme, etc.

Thomley's trustees are holding a Strategy Day in November 2024 to finalise the Charity's next multi-year strategy. Many of the strategic priorities of our current strategy are expected to carry over:

- Develop our site to its full potential. This includes building new programmes and services for visitors, and creating new, sustainable income streams that reduce reliance on grant funding.
- Demonstrate and measure impact.

It is essential that:

- Our activities deliver impact.
- We attract and retain support from beneficiaries, funders and partners.

3. Grow awareness of Thomley. We must reach and support as many people as possible by improving our marketing and communications.

Thomley enters 2025 holding multi-year grants from six different funders, with pledges totalling £144,750. This represents the largest amount of next-year income the Charity has ever secured before year end.

As a part of its Fundraising Plan, Thomley performs ongoing prospecting to identify and pursue major grant funding opportunities (over £10,000) and identify smaller grant funding opportunities (under £10,000) for our Community Fundraising Team.

Thomley's full-time Playworkers spend 20% of their time performing Community Fundraising activities.

We have created a Community Fundraising Resource Pack (updated continuously) that provides team members with current, ready-to-use information that allows them to complete funding applications efficiently and to a high standard.

Established partnership work with New Meaning Training (Thomley Achieve Life Skills Programme for young people ages 16-25 with SEND) will continue. This partnership allows us to deliver this programme more cost-effectively than we would be able to do alone.

Our commissioned work to deliver the Holiday Activities and Food Programme (HAF) with local councils (Buckinghamshire, Oxfordshire, Milton Keynes) will continue. HAF brings new visitors to Thomley, helps extend our reach, and diversifies our income.

We will continue to pursue new partnership opportunities and commissioned work. This could include bidding to provide a Short Breaks service and working with another organisation to develop a new soft play facility on a separate site.

We are also planning a new programme of extended special events and community events. The number of events we hold each year continues to grow and is another important way that we are diversifying our income stream and attracting new visitors to Thomley for the first time.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Despite the two COVID lockdowns in 2020, Thomley opened to visitors for 8 months and saw 13,883 visits (5,353 by people with disabilities; 8,030 non-disabled).

During the pandemic, Thomley furloughed staff, accessed the government's Job Retention Scheme, and eliminated non-essential expenditure. For the year-ended 31 Dec 2020, Thomley recorded a surplus of £109,943 (£163,707 excluding depreciation). This was due to the prudent financial decisions and successful fundraising year that saw us secure major COVID-related grants and our own supporters raise £16,080 for the charity through the 2.6 Challenge.

We were closed to visitors through the first three months of 2021 (third national lockdown) but used the 'downtime' to progress site developments. Thomley re-opened with an all-outdoor provision on 30 March 2021. By 19 July 2021 (end of all lockdown-related restrictions) we were able to offer our visitors more programmes, services and activities than ever before. As a result, visitor numbers quickly recovered and have grown ever since:

- YE 31 Dec 2021: 24,315 visits (9,726 by people with disabilities; 14,589 non-disabled)
- YE 31 Dec 2022: 34,705 visits (13,882 by people with disabilities; 20,823 non-disabled)
- YE 31 Dec 2023: 37,435 visits (14,974 by people with disabilities; 22,461 non-disabled).

For the year ending 31 Dec 2021, Thomley recorded a surplus of £119,881 (£181,176 excluding depreciation).

The cost-of-living crisis resulted in significant increases to Thomley's operating costs, mainly through increased staffing and energy costs:

- YE 31 Dec 2021 expenditure: £612,011
- YE 31 Dec 2022 expenditure: £770,672
- YE 31 Dec 2023 expenditure: £879,233.

Re: Reserves

The trustees intend to hold reserves at any one time:

- Equivalent to the estimated essential net running cost of our charity for the ensuing quarter.
- To help mitigate the risk of an unforeseen emergency or other unexpected need for funds.

Our 31 December 2023 accounts showed that Thomley held £73,365 in 'free reserves'. This represented the unrestricted cash we held in the bank on 31 December 2023 that was available to spend.

Those accounts also showed we held £458,079 in 'unrestricted reserves'. This represented the current value of fixed assets purchased by the Charity using unrestricted funding over many years. We are required to account for our fixed assets purchased using unrestricted funding in this way, because the fixed assets have a value associated with them.

For the avoidance of doubt, these 'unrestricted reserves' are not cash and are not available to spend.

Re: Depreciation charges and recent deficits

Thomley incurs large depreciation charges each year (2021: £61,295; 2022: £71,903; 2023: £76,969) against its fixed assets.

Over the past three financial years, Thomley recorded a surplus of £119,881 (YE 31 Dec 2021), a deficit of £45,517 (YE 31 Dec 2022) and a deficit of £106,202 (YE 31 Dec 2023).

The deficits do not accurately reflect the Charity's financial outcomes because the depreciation charges are not actual expenditures.

Less depreciation charges, Thomley recorded a surplus of £181,176 (YE 31 Dec 2021), a surplus of £26,386 (YE 31 Dec 2022) and a deficit of £26,233 (YE 31 Dec 2023).

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

As a part of Thomley's Marketing and Communications Strategy, we perform market research and regularly survey and consult with our visitors to better understand their needs. Our Theory of Change was developed in consultation with visitors from South Oxfordshire, who described the challenges their children with disabilities face:

- Don't have access to play, leisure and recreation facilities/opportunities
- Don't have access to age appropriate social/friendship opportunities

- Don't have access to age appropriate developmental/transitional opportunities
- Lack the skills to be independent
- Don't have freedom of choice
- Lack places to be able to take risks.

In addition, parents and carers also told us about the challenges they face:

- Limited short break opportunities
- Stigma, judgement and exclusion because of their children's disabilities
- Not knowing where to get help and support.

Our Theory of Change captures these needs:

- People with disabilities miss out on developmental opportunities because mainstream provision is often ill-equipped to address their complex needs.
- Parents and carers are often overwhelmed in their caring roles and do not know where to get support.
- Non-disabled people often have little or no experiences with disability and are not prepared to meet the needs of people with disabilities.
- There is a lack of strategic, joined-up approaches to addressing the lifelong needs of people with disabilities.

We understand these needs because we talk to our visitors about them every day and we participate in county-wide groups to better understand and influence local and regional provision. Our Chief Executive sits on the BOB (Buckinghamshire, Oxfordshire and Berkshire West) VCSE Health Alliance's Learning Disability and Autism Group and the SEND Integrated Services Board for Buckinghamshire.

Thomley is a responsive and visitor-led organisation. We perform end-of-day reviews of visitor comments, hold regular Visitor Voice sessions with senior staff, perform large-scale visitor surveys, and have Trustees who are regular visitors. In 2025 we are investing in interactive customer feedback equipment to make it easier for visitors to give us feedback every day. Over the past four years, our capital developments, new programmes and other improvements have been led by our visitors.

In our most-recent annual survey (Summer 2023), parent and carers told us visiting Thomley helped their children in the following ways:

- 97% built confidence
- 96% improved their physical wellbeing
- 92% improved their emotional wellbeing
- 93% developed social skills
- 95% learned new skills
- 95% felt included, welcomed and valued.

As a part of this survey, we also asked parents and carers how Thomley had contributed to their own outcomes. They told us that after visiting Thomley they:

- 98% felt relaxed
- 96% felt positive and better able to cope
- 93% felt less isolated
- 89% had shared and benefitted from the experiences and support of other parents or carers
- 57% were able to take a break from their caring role
- 96% were better able to understand and embrace their differences.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Since the launch of our current strategy (Survive, Adapt and Thrive – 2021-2024), visitors have led Thomley's developments by identifying and prioritising the new experiences, activities and improvements they want to see.

More specifically, people with disabilities and their parents and carers help shape our organisation and

activities in the following ways:

- Participating in our Visitor Voice Group, a representative group of visitors that meet with Service Team and Senior Leadership Team members on a regular basis, providing feedback on existing programmes and helping us plan future ones. A direct result of this group meeting was the selection of an Interactive Water Feature (IWF) as a major capital project that Thomley successfully completed in 2024.
- Participating in our Annual Visitor Survey, a visitor-wide questionnaire that gathers feedback from all beneficiary groups about the charity's impact and asks what new things our visitors would like to see. The results of these surveys have been used to prioritise recent site developments (e.g. IWF; Outdoor Learning Centre; Horticultural Area).
- Offering feedback and interacting with our Services Team every day to help choose current and future activities and experiences. An example of this is the selection of our bimonthly themes — these are used to structure daily activities to create a larger experience. All feedback is reviewed at end-of-day debrief meetings by the Services Team.
- Planning, organising and delivering their own activities. An example of this is our Youth Club (ages 14-17), Adult Social Club (18+), and Adult Cooking Club (18+) which are led wholly by its participants.
- Utilising information and insight gleaned from the Chief Executive's participation in county-wide groups that work together to address gaps in provision. Our Chief Executive sits on the BOB (Buckinghamshire, Oxfordshire and Berkshire West) VCSE Health Alliance's Learning Disability and Autism Group and the SEND Integrated Services Board for Buckinghamshire amongst others. An outcome of this is Thomley now delivers healthful food and enriching activities to more than 1,500 children and young people (disadvantaged and/or with a disability) through the Holiday Activities and Food Programme (HAF) in partnership with Buckinghamshire Council, Oxfordshire County Council and Milton Keynes City Council.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

As an organisation, equality and inclusivity have been defining features of Thomley since its founding in 1997 when a group of parents with autistic children, frustrated at being turned away from mainstream facilities, created Thomley as a place where everyone was always welcomed and valued, and no one would ever be turned away.

Our Equalities Policy is implemented to ensure our services and activities meet the needs of all visitors in the following ways:

People with disabilities

- Providing a range of regularly scheduled days (Pre-School Days; 13+ Days; Quiet Days) through which we tailor programming to meet the specific needs of different visitor groups.
- Opportunities to plan and lead activities through our Youth Club, Adult Social Club and Adult Cooking Club.
- Offering a pathway into education, employment and further training through the Thomley Achieve Life Skills Programme for young people with SEND (ages 16-25) that promotes equality of opportunity.

Parents, carers and family members of people with disabilities

- Offering a range of membership and fee options (including concessions for people on benefits) that provide the best value for money for our visitors.
- Providing Disability Family Days – these are days when extended family members and friends of people with disabilities are invited to Thomley; activities on these days are designed to enable large group and whole family participation.
- Providing access to practical workshops and one-to-one support with an autism specialist practitioner

- Subsidising the full cost of our activities for visitors through fundraising and income-generating activities

Non-disabled people from the wider South Oxfordshire community

- Holding regular Open for All Days and other open days (Spring and Summer Open Days) when families from South Oxfordshire with or without children with disabilities can visit Thomley.
- Hosting regular Community Engagement Events (e.g. Fireworks Nights; Summer Accessival Festival) when we are open to everyone from South Oxfordshire.

Voluntary and community sector organisations

- Partnership work with local organisations to improve inclusion and accessibility by offering subsidised Camping Pod Stays.
- Partnership work with a local social enterprise to deliver the Thomlmev Achieve Life Skills Programme for young people (ages 16-25) with SEND.
- Delivering commissioned work (Holiday Activities and Food Programme) that provides enrichment activities and free hot meals for children in receipt of Free School Meals, reducing disadvantage and exclusion.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Thomley has developed a Theory of Change that connects and aligns its activities with the outcomes and impact we are trying to achieve for our visitor groups. We use BBC Children in Need's outcome and impact tools to gather on-the-day feedback to measure progress towards our key outcomes. This feedback is used to improve our activities and programmes. In our most-recent survey (Summer 2023), parents/carers told us visiting Thomley helped their children in the following ways:

People with disabilities:

- 97% built confidence
- 96% improved their physical wellbeing
- 92% improved their emotional wellbeing
- 93% developed social skills
- 95% learned new skills
- 95% felt included, welcomed and valued.

'I honestly don't have the words for how I feel about Thomley and how grateful I am. Our son has ASC/ADHD difficulties which used to show in extremely difficult and often violent behavior and we literally couldn't take him out at all at one stage. At Thomley he has been able to make friends, practice social skills and try new things. Staff have helped him to engage with others and his self-esteem has sky rocketed, and his behavior has improved beyond measure.'

Parents and carers and family members of people with disabilities

As a part of this survey, we also asked parents and carers how Thomley had contributed to their own outcomes. They told us that after visiting Thomley they:

- 98% felt relaxed
- 96% felt positive and better able to cope
- 93% felt less isolated
- 89% had shared and benefitted from the experiences and support of other parents or carers
- 57% were able to take a break from their caring role
- 96% were better able to understand and embrace their differences.

'Being at Thomley gives me confidence knowing I can feel relaxed, with no anxiety or pressure, all the equipment and resources around the site, opportunities and activities for everyone, help with physical and mental health, a safe place, and feeling accepted and valued as a family.'

Non-disabled people from the wider South Oxfordshire community

An increasing number of non-disabled people are visiting Thomley. Bringing together non-disabled people

and people with disabilities to share experiences and participate in activities together is an important way we help break down barriers.

Non-disabled people leave Thomley with a greater understanding of the needs of people with disabilities and are better equipped to meet those needs in the wider community.

Voluntary and community sector organisations

Our Chief Executive sits on the BOB (Buckinghamshire, Oxfordshire and Berkshire West) VCSE Health Alliance's Learning Disability and Autism Group and the SEND Integrated Services Board for Buckinghamshire. Our inclusion in these groups demonstrate that Thomley is held in high regard and valued for its insights and knowledge as a specialist provider.

Our successful fundraising efforts – we have secured many major and multi-year grants from statutory funders, trusts and foundations – evidence that funders are confident Thomley meets the needs of our visitor groups.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

4,032

Please explain how you have determined the number of beneficiaries.

Thomley uses Customer Relationship Management software and an Electronic Point of Sales system to track visitor numbers and origins. When visitors arrive at Thomley for their first visit they complete a registration form through which we record their name, age, address, contact details and additional information about their needs. This information allows us to determine the number of Thomley visitors who originate from South Oxfordshire. Projected visitor numbers for 2025/26 and 2026/27 are based on 10% growth versus actual visitor numbers from 1 April 2023 to 30 March 2024.

Please describe who will directly benefit from your services/activities.

Thomley works with four main groups:

- people with disabilities of all ages (25%)
- parents, carers and family members of people with disabilities (35%)
- non-disabled people in our wider community (40%)
- voluntary and community sector organisations.

The majority (70%) of the people with disabilities who visit Thomley have Autistic Spectrum Disorder with behavioural and/or learning impairments that make accessing mainstream provision difficult or impossible for them. About 20% of our visitors with disabilities have Down's Syndrome, and the remaining 10% have other disabilities.

About 70% of the parent, carers and family members who visit Thomley are in receipt of benefits.

How we support our priority groups:

- We support people with disabilities throughout their lives.
- We provide people with disabilities of all ages with developmentally meaningful play, leisure, learning and training opportunities at our facility in rural Buckinghamshire.

For early years visitors, we offer play, leisure and recreational activities.

For children, play, leisure and recreational activities continue, but with more focused, purposeful life skills and group activities introduced.

For young people and adults, the previous activities remain available, but two separate streams emerge.

For those who have the potential to live more independently and/or manage a working environment, we offer accredited life skills training to help them achieve these goals.

For those whom living independently and/or securing work may not yet be a realistic aspiration, we provide

purposeful activities that build upon their learning capabilities.

We help parents, carers and families to better cope with their caring role:

- We support the parents, carers and families of people with disabilities by offering them short breaks from their caring role whilst visiting Thomley. These create vital opportunities for them to recharge, reconnect and leave Thomley refreshed and more resilient.
- We operate an overnight camping pod service for families, offer practical workshops delivered by experts in the field of autism, and hold regular Disability Family Days with activities planned for whole-family participation.
- We hold several special events throughout the year (e.g. Mother's/Father's Day Lunch; Roast Dinner Days; Christmas Market) to create opportunities for families to celebrate holidays and special occasions in ways that they could not do at mainstream facilities.

We provide opportunities for people with disabilities and non-disabled people to come together

Thomley helps foster a greater understanding of the needs of people with disabilities in our community by bringing non-disabled members of our community to Thomley to share experiences. We do this by holding regular Open For All Days and other special events when anyone from our community can come together to have fun and leave with a greater appreciation of people with disabilities' abilities and needs.

We are mapping existing provision for people with disabilities, identifying gaps in provision and creating and encouraging partnership working to address those gaps.

Our Chief Executive participates in two county-wide groups in Buckinghamshire and Oxfordshire who work to create joined-up solutions that address the needs of young people with special educational needs and disabilities.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Thomley complements council services in the following ways:

We work with local partners and organisations to encourage joined-up solutions to improve lifelong provision for people with disabilities in South Oxfordshire. The Thomley Achieve Life Skills Programme for young people (ages 16-25) with SEND was developed to help address a missing piece of the puzzle. This programme complements existing council provision by offering a progressive pathway from the end of secondary school through Preparation For Adulthood.

Thomley also complements local provision through its network of relationships across South Oxfordshire. Through these relationships, we are able to signpost visitors on to council services, other charities and local providers (and vice versa), so people with disabilities and their parents and carers can access the support they need.

Thomley reduces the likelihood of its visitors needing support from the council in the following ways:

Thomley heavily subsidises the full cost of its programmes, services and activities for visitors through our fundraising and income generation activities. Income from visitor memberships and fees account for only 20% of Thomley's annual income. Thomley provides exceptional value for money for its visitors, who would otherwise struggle to find comparable provision at the same price and scale in South Oxfordshire. This reduces demand on support from the council for comparable services.

Thomley is a lifelong learning and leisure centre for people of all abilities and disabilities. The programmes, services and activities we provide help people with disabilities build confidence, improve their physical and emotional wellbeing, develop social skills, learn new skills, and feel included, welcomed and valued.

As a result, they are less likely to need support from the council across a wide range of areas: general health and wellbeing; mental health; behavioural issues and anti-social behaviour; educational needs, etc.

The short breaks, practical support and signposting we provide for parents and carers of people with disabilities help them build resilience and be better equipped in their role as carers. Parents and carers tell us they leave Thomley feeling relaxed, positive and better able to cope, less isolated, have shared and

benefitted from the experiences and support of other parents and carers, and are better able to understand and embrace their differences.

As a result, they are less likely to need support from the council across a wide range of areas: general health and wellbeing; mental health; employment and benefits; housing, etc.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

The outcomes (Thriving and Healthy Communities) we want to achieve with this funding:

People with disabilities:

- Early Years: building confidence, learning new skills, developing social skills.
- Children: building confidence, developing basic life and self-care skills, learning soft skills and practical skills, building new friendships and consolidating existing ones.
- Young people and adults: building confidence, and developing practical skills and social skills to live independently and work (Thomley Achieve Life Skills Programme in partnership with New Meaning Training, a local social enterprise); developing healthy living skills; building and maintaining social relationships.

Parents and carers:

- Reduce isolation; expand and consolidate their support networks; improved resiliency; improved overall wellbeing.

Non-disabled people from the wider South Oxfordshire community:

- Come to a fuller and more positive understanding of the needs of people with disabilities, and to be better prepared to meet their needs so they can more fully participate in community life.

Voluntary and community sector organisations:

- Galvanising voluntary and community sector organisations to act in partnership; modelling best practice through our own partnership work.

We will know these outcomes have been met by using BBC Children in Need's outcome and impact tools to track them:

People with disabilities:

- building confidence
- improving their physical wellbeing
- improving their emotional wellbeing
- developing social skills
- learning new skills
- feeling, welcomed and valued.

Parents and carers:

- feeling relaxed
- feeling positive and better able to cope
- feeling less isolated
- sharing and benefitting from the experiences and support of other parents or carers
- able to take a break from their caring role
- better able to understand and embrace their differences.

These outcomes will be triangulated by annual, large-scale surveys in which we ask visitors about how well we are achieving them, what evidence they see of this, how we could do better, and what activities, services and experiences they would like to see developed at Thomley.

Non-disabled people from the wider South Oxfordshire community:

- attending a disability-focused community event for the first time

Voluntary and community sector organisations:

- number of partnerships that improve lifelong provision in South Oxfordshire for people with disabilities and their parents and carers
- participation in county-wide groups that influence local provision and share information and knowledge: BOB (Buckinghamshire, Oxfordshire and Berkshire West) VCSE Health Alliance's Learning Disability and Autism Group and the SEND Integrated Services Board for Buckinghamshire.

During the funding period, we also expect to realise outcomes relevant to two other Corporate Plan priorities:

Action on climate change and nature recovery – Furthering decarbonisation at Thomley by installing Solar Panels, EV Charging Points and E-Bike Charging Points that reduce reliance on non-renewable energy sources.

Homes and infrastructure that meet local need – Thomley will continue providing subsidised access to our specialist activities for people with disabilities as the only large-scale provider in South Oxfordshire. Visitor fees and memberships account for only 20% of our annual income.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Thomley has ongoing, successful partnerships with local organisations, councils and individuals that enable the Charity to extend its reach and broaden its provision:

- New Meaning Training – Thomley Achieve Life Skills Programme for young people (ages 16-25) with Special Educational Needs and Disabilities; delivered at Thomley's site.
- The Clare Foundation – development of 7 Serviced Offices and 3 Camping Pods; ongoing funding to provide subsidised overnight Camping Pod stays for people with disabilities and their families.
- Buckinghamshire, Oxfordshire and Milton Keynes Councils – Holiday Activities and Food Programme (HAF), delivering hot meals and healthy eating activities to disadvantaged children outside of term time; we have received feedback from our council partners that our provision is regarded as 'best in class'.
- Commercial Sponsors for our major events e.g. Accessival Summer Festival; Christmas Ball; Fireworks Night.
- Corporate Social Responsibility Days at Thomley, providing 'funding in kind' through volunteering from local Microsoft, Thames Water, Travelodge and Kubota employees.
- Support from the local Lions and Rotary Clubs.
- Greatest Hits Radio/Cash For Kids; Holiday Hunger Programme.
- Charity of the month at Tesco and Asda
- Ken Bruce, MBE is one of Thomley's patrons. He regularly attends our fundraising and special events and uses his platform to raise Thomley's profile.

At the strategic level, Thomley has developed partnerships that have given it access to skills, expertise and networks of influence:

- South Oxfordshire District Council
- Buckinghamshire Council Integrated Service Board
- Buckinghamshire, Oxfordshire and Berkshire (BOB) VCSE Health Alliance (Learning Disability and Autism Sub Group)
- Community Impact Bucks.

These strategic partnerships provide opportunities for Thomley to influence policy and practice through advocacy for people with disabilities and the whole VCSE sector. The Charity is often asked to share its

insights and best practices.

In addition to the major partners listed above, we work with a wide range of community, voluntary and charity organisations including Membership Council for Disabled Children, The National Council for Voluntary Organisations (NCVO), Small Charities Coalition, OCVA, National Children’s Bureau, Robin Network, Play England, National Autistic Society, Oxford Additional Needs Partnership (OXAP), Oxfordshire and Buckinghamshire Safeguarding Boards, Oxfordshire Young Persons Forum, Oxfordshire Parent Carers Forum (OxPCF), Oxfordshire Youth, Elderly Care Bucks, Buckinghamshire Mind, Buckinghamshire Skills Hub, LEAP Buckinghamshire, Heart of Bucks.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Thomley continues to follow the strategic objectives of its current strategy, ‘Survive, Adapt and Thrive 2021-2024’.

Develop our site to its full potential. This includes building new programmes and services for visitors, and creating new, sustainable income streams that reduce reliance on grant funding.

Demonstrate and measure impact. It is essential that:

- Our activities deliver impact
- We attract and retain support from beneficiaries, funders and partners.

Grow awareness of Thomley. We must reach and support as many people as possible by improving our marketing and communications.

The Charity is currently developing its next multi-year strategy (a Trustee Strategy Day is being held in November 2024) and it is expected that many of the strategic priorities of our current strategy will carry over to our next strategy.

We are currently exploring the refurbishment of a workshop on our site, in partnership with New Meaning Training. They currently work in partnership with us to deliver the Thomley Achieve Life Skills Programme and we previously worked with them to refurbish a barn to create the workshop in question. New Meaning Training leases the workshop from Thomley to deliver their own Construction Skills programme at our site. A further refurbishment of the workshop would enable New Meaning Training to increase the number of beneficiaries supported through their programme as well as through the Thomley Achieve Life Skills Programme.

Established partnership work with New Meaning Training (Thomley Achieve Life Skills Programme for young people ages 16-25 with SEND will continue throughout the grant period. This partnership allows us to deliver this programme more cost-effectively than we would be able to do ourselves.

Our commissioned work to deliver the Holiday Activities and Food Programme (HAF) with local councils (Buckinghamshire, Oxfordshire, Milton Keynes) will continue. HAF brings new visitors to Thomley, helps extend our reach, and diversifies our income.

Throughout the grant period, we will continue to pursue new partnership opportunities and commissioned work. This could include bidding to provide a Short Breaks service and working with another organisation to develop a new soft play facility on a separate site. We are subscribed to the Proactis Pro Contracts Notification Services Framework.

We are also planning a new programme of extended special events and community events. The number of events we hold each year continues to grow and is another important way that we are diversifying our income stream and attracting new visitors to Thomley for the first time.

We are confident we will be able to create new partnerships and secure new commissioned work because of our established track record over the past four years realising the strategic goals of our Survive, Adapt and Thrive strategy. Our ability to complete capital projects on time and on budget, and to deliver outcomes in our partnership and commissioned work positions us well for the future.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Thomley has taken significant steps to decarbonise its operations, promote nature recovery, and improve its environmental sustainability:

- Independent, external energy assessment completed (VCSE Energy Efficiency Scheme; May 2024)
- Biodigester installed to break down food waste and other organic material
- Replacement of all lighting to energy-efficient LED bulbs
- Elimination of single-use plastic items in our café
- Funding secured (SODC Rural England Prosperity Fund) to install PV Solar Panels, EV Charging Points and E-Bike Charging Points
- Adoption of hybrid working for staff members who do not need to be on site to carry out their duties
- Use of Cloud-based computing systems to reduce the amount of computer hardware we need to purchase and replace
- Extension of our Sensory Garden to create more green space
- Creation of a Horticultural Area that allows us to grow vegetables and fruit that are used in our café and support greater biodiversity
- Creation of the Eco-Woodland Outdoor Learning and Adventure Centre (SODC Rural England Prosperity Fund): improving biodiversity and pollinator support; carbon capture and air quality improvement; storm water management, water quality improvement and erosion prevention; built with sustainable materials and permeable pathways.

Thomley takes into account the environmental and sustainability guidance contained in The South Oxfordshire Local Plan 2035 as a part of its operations and planned site developments. The Charity is also participating in the Joint Local Plan 2041 consultations with South Oxfordshire and Vale of White Horse district councils.

Thomley's Environmental Policy that commits the Charity to minimising the impact of its activities on the environment.

Where possible, Thomley will:

- Implement a training program for our staff to raise awareness of minimising the impact of our activities on the environment and enlist their support in improving our performance
- Use non-toxic products
- Reduce our consumption of resources and minimise waste by evaluating operations and ensuring they are as efficient as possible
- Minimise toxic and greenhouse gas emissions generated by our activities.
- Actively promote recycling both internally and amongst our visitors and suppliers
- Source products and services which minimise the environmental impact of both production and distribution
- Meet or exceed all relevant English environmental legislation
- Use an accredited program to offset the greenhouse gas emissions generated by our activities
- Working with sustainable providers and suppliers

Style Acre	Ref: SRev25-27/18
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. Most of Style Acre's income is earned from local authority contracts to provide our supported living and day opportunities services. We raise funds so people we support can access opportunities that go beyond everyday support provision, we must raise funds so that we can continue employment support through our Work Programme. Since 2009, the Work Programme has been funded primarily by charitable trusts and we must continue to secure funding each year to sustain the Programme. We are grateful to have secured multi-year grants in previous years which give our additional services great security. One off grants of varying amounts are also vital in enabling us to cover our costs. Every year we research, plan and submit grant applications to trusts and organisations that we are eligible to apply to. We also receive some payment for Employment Support Worker support from a limited number of people who participate in the Programme. We also raise funds from community groups, companies and individuals and run a programme of community fundraising events to raise funds for our services and maintain diverse income streams.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. The Charity will continue to be financially stable as 92.4% (2023-24) of the Charities income relates to long term contracts with local authorities and NHS continuing health care providers for provision of support to people with learning disabilities and autism. As such, future income streams are secured. The remaining fundraising income including grants allow us to provide additional support to enhance the lives of the people we support and provide opportunities that they would otherwise be unable to access. We are seeking multi-year funding to provide stability for the programmes that only exist due to fundraising but are fundamental to the opportunities provided by Style Acre to the people we support.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. Not applicable</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. 6.9% of adults with a learning disability known to their local authority in South East England are in paid work (NHS Digital, 2021). People with learning disabilities do not have the same opportunities to work and volunteer as most people; they miss out on employment related benefits such as developing skills, learning new things, a sense of purpose and social contact. We identified the need for our Work Programme in 2009 and it has grown and evolved in response to consistent demand from people we support seeking to work or volunteer. The service is demand led and responds to requests from people we support and sometimes external referrals to find work and voluntary placements that meet individual need.</p> <p>Employment support for people with moderate learning disabilities is not widely available in Oxfordshire. Our Work Programme fills this gap and offers employment support to people with both mild and moderate learning disabilities and/or autism who may require ongoing personalised support and direct support in placement in order to access work and voluntary opportunities. People we support have work and volunteering aspirations but they need support to fulfil them. Our Work team supports people into voluntary and work placements at our own social enterprises and at local companies. We have set up our own social enterprises so that people we support can access safe, supported work and voluntary placements. Our five social enterprises comprise a tea room, charity shop, Ebay shop, garden maintenance business and medal making workshop. People we support are also employed by Style Acre at our hubs and as Quality Checkers. We currently have 118 people in voluntary or paid work placements across our social enterprises and 56 external organisations.</p>	

Personalised, flexible support from our Work Programme means people with learning disabilities can find and keep fulfilling work and voluntary placements. The impact on people's skills, confidence and self-worth can be transformational. Everyone's aspirations and outcomes are unique; for some, the benefits of the programme are less about finding paid employment and more about improved mental health and wellbeing, establishing daily routines, a sense of self-worth and social inclusion. Some people are proud to deliver a good service, thrive on learning new skills and value being paid. It can be difficult for adults with learning disabilities and autism to find and keep work, but our tailored employment support makes it possible. Without support, people with learning disabilities are excluded from contributing to local workplaces. Our most recent feedback survey shows the impact that our placements have on the lives of people we support. Our success stories show what people can achieve with personalised support.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Delivering person centred support is at the heart of everything we do; we ensure people can make choices about their care, support and how they live their lives. Our Work Programme was established in 2009 and has grown and evolved in response to consistent demand from people we support seeking to work or volunteer. Feedback from people we support is given through regular personal progress reviews that take place throughout placements; together, adaptations and progression plans are made ensuring employee and employer receive the support they need to maintain mutually beneficial placements.

All Style Acre support teams have an open door policy and it is commonplace for people we support to give informal ideas and feedback. Enabling people to make their own choices about what they do and how they are supported is a fundamental aspect of everyone's individual support plan. Feedback surveys at our community hubs and for additional programmes such as our Work Programme and Garden Project are another opportunity for people to suggest activities or support they would like to have. The activities we develop are initiated by people we support, or by support teams identifying solutions to needs that become apparent.

A Work Programme feedback survey at the end of 2022 had a 51% response rate and shows the positive outcomes of the Work Programme:

- 100% were happy with the support they receive at work
- 100% said their work placement helped them feel more confident
- 100% said their placement helped them feel valued and fulfilled in their role
- 100% said their placement helped them feel happier/have better mental health
- 98% said their work placement helped them feel more independent
- 98% reported their work placement helped them to make new friends, meet new people and feel part of a team
- 98% reported that their work placement helped them improve their communication skills
- 96% reported that their work placement helped them to learn new skills.

People we support are involved in shaping all of our services. Through our Have a Say forum, people we support give direct feedback to the Style Acre board. Four people on our Board of Trustees have family members who have learning disabilities and are supported by Style Acre so they understand the impact of our support. We are currently recruiting for someone we support to be on our Board of Trustees, this will be in place by the end of 2024. Four people we support have roles as Ambassadors, they help to promote the charity in their communities. XXXX is one of our Ambassadors and he initiated a popular fundraising event which will run for the third year this year – XXXX's Halloween Disco is lots of fun, hosted by XXXX and supported by the fundraising team.

People we support are involved in event and project committees and recruitment. Our Quality Checkers scheme involves people we support visiting supported living houses so residents can give feedback about their support.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

One of Style Acre's core values is respectful – at all times and for everyone. Our values are embedded into the culture of the organisation from Induction throughout an employee's journey with Style Acre, forming part of supervisions and appraisals.

Style Acre launched Pride Acre for the people we support, and staff. These meet ups are opportunities for those at Style Acre who are part of the LGBTQ+ community to meet up, connect and discuss any issues affecting them. We have attended Reading Pride with recruitment information, with plans to be at the first

Didcot Pride event next year with a “Style Acre Village.”

Support Plans and Dynamic Positive Behaviour support plans are in place for the individuals we support which are written with the individual we support, family members, advocates and professionals. These are updated as support needs change. Support Plans include relevant history including trauma events to enable those individuals to receive appropriate support. Consultation and joint working with external agencies and families is essential and something we excel in.

At Style Acre, all staff are encouraged to develop a one page profile for themselves so we can celebrate our staff and the people we support alike. These profiles give an insight into how each member of the team likes to communicate and what others value about them, promoting equality and fairness by recognising that every staff member is different and brings something to the table.

Our quarterly employee forums bring the Senior Management Team together with individuals at every level of the organisation to share ideas and feedback to help shape future projects within Style Acre. Employees feel respected and part of the organisation. Their opinions matter and their voices are heard. The SMT is accessible creating a feeling of equality. We also ask for employee feedback through surveys, share the results with employees and explain how we will address any issues raised.

We are registered with the government scheme Disability Confident - Committed Level 1. We employ people we support and people volunteer in a variety of roles throughout the charity.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

The people we support have learning disabilities and/or autism.

We will know we have met people's needs through:

- Ensuring their support meets the needs identified in their personal support plan
- Conducting regular individual work placement progress reviews
- Requesting anonymous feedback from participants through thorough surveys. Our last Work Programme Survey was conducted in December 2022 and we will undertake another feedback survey in December 2025
- People telling us that they are happy in their work/volunteering, that they receive the support they need, that their work/volunteering leads to feeling confident, independent, valued and to skills development
- Employers and partners telling us the support they receive from us meets their needs
- Employers and partners telling us how people we support contribute to their workplace.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

67

Please explain how you have determined the number of beneficiaries.

In total 118 people with learning disabilities that we support are working or volunteering. 58 people currently live in South Oxfordshire. We anticipate growth in the number of people in South Oxfordshire that we can support into work and volunteering. We have based the figure on existing residents who work or volunteer and estimated that an additional 8-10 people will be supported over the next two years.

Please describe who will directly benefit from your services/activities.

Adults with learning disabilities and/or autism will be the primary beneficiaries of our Work Programme. 100% of our beneficiaries are classed as a vulnerable/priority group.

Our social enterprises offer services that benefit local people. Our Tea Room is a popular meeting place for the people of Blewbury and nearby Didcot and other towns. Our charity shop offers low cost preloved clothing, books and toys. People we support contribute their time to local charities and businesses benefitting wider society. At the cafe we run with SOHA, residents of the over 55s housing meet and get to know each other and people we support while enjoying meals prepared and cooked by our volunteer team. People we support are working and volunteering because they want to have a positive impact in their community, support from our Work team makes it possible for people to use their skills and show what they can do. This changes public perceptions around disability and what people can achieve with the right support.

Our team of volunteers benefit from their work at our social enterprises and supporting work placements, we have a regular volunteers at our Tea Room and charity shop who are valued members of our community. People enjoy developing new skills, connecting with people we support, our employees and other volunteers and contributing to their community.

The families of people we support benefit from knowing that their relative is supported to fulfil their potential and pursue their interests through working or volunteering.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The South Oxfordshire District Council Diversity and Inclusion Strategy says 'We aspire to create an environment where everybody belongs and has a voice that will be heard. We will embrace our differences, the unique talents, beliefs, backgrounds, and abilities of all our staff and residents. Together we will make a positive difference.' Our Work Programme complements this strategy by directly supporting people with learning disabilities to be valued and included in South Oxfordshire workplaces. As well as work placements, people are supported to volunteer and contribute their time to local groups and charities, benefitting the wider community and complementing the Council's encouragement of volunteering.

Our Work Programme indirectly reduces the likelihood of needing support from the council by contributing significantly to the wellbeing and inclusion of people with learning disabilities; this service means people can access placements that give them social connections, new skills, a chance to contribute and feel valued and to engage in interesting work that keeps them active in their community.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Inclusion, accessibility and accountability

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our Work Programme will lead to:

- increased inclusion as local organisations recruit people with learning disabilities to work and volunteer, we will know this has been met by monitoring the number of people we support who have a work placement with a local employer
- improved employability of people in a priority group working and volunteering across South Oxfordshire, we will know this has been met by monitoring the number of successful placements taking place in the District
- improved wellbeing for people with learning disabilities as a result of working or volunteering - people will report increased confidence/skills/independence, we will know this has been met by consulting people through regular individual progress reviews and Programme wide feedback surveys
- increased accessibility for priority groups to local employers as a result of employment support - we will monitor the number of new employers that we develop relationships and placements with
- increased recognition of contributions people with learning disabilities make to workplaces - we will increase awareness through a social media campaign to promote the value people we support bring to local workplaces and introduce a Work Awards event.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

We deliver our Work Programme with our network of partners and employers. Since 2015 we have worked in partnership with Sustainable Wantage and Wantage Community Support Service (Oxfordshire County Council) to run a market garden in Wantage. People volunteer at the garden as a result of our joint working. We work with 56 employers who have recruited people we support to work or volunteer at their workplace. We have recently started a partnership with South Oxfordshire Housing Association at a new over 55s supported accommodation in Wallingford. People we support prepare and serve meals to residents in the communal kitchen area and lounge of the flats. People we support are developing their skills and making connections with the residents and the residents connect with each other whilst sharing a meal together. Our Work Programme aims to remove barriers to employment for people we support and to ensure they have the same opportunities to work as everyone else. Working alongside local charities, companies and individuals

is an essential and valued aspect of the service – only by working with others can we offer a variety of fulfilling placements where people we support can contribute their time and skills in their local community and work in their preferred sectors. Examples of organisations we are currently working with include Didcot Railway Centre, Willowbrook Leisure Centre, Waitrose and the Springs Hotel.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

We ensure that our fundraising income is diverse. We research and plan a programme of grant funding requests, maintain links and projects with community groups, individuals and companies. We also plan fundraising events each year which raise funds. We have started two new social enterprises in the past year and we hope to continue to expand our social enterprises as this leads to additional work opportunities and income potential.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We don't currently have a Climate and Nature policy but we are in the process of developing an environmental / sustainability policy which will be ready for approval by the end of March 2025.

We will be working hard to reduce our carbon footprint by starting to introduce electric vehicles into our fleet and encouraging and training the people we support to use public transport more. We will be working towards reducing printing, increasing recycling and ensuring all of our utility contracts are on green energy tariffs. We will be refurbishing laptops whenever possible and continuing to use Teams meetings to reduce unnecessary travel. We will also be encouraging cycling /walking to work.

We support nature through our work at our shared Market Garden in Wantage and through promoting ways to make gardens at our hubs and houses wildlife friendly through planting and creating wildlife habitats such as bug hotels and bird boxes. Sustainable gardening methods such as organic gardening and use of peat-free compost are used at the Market Garden. Planting at the garden focusses on pollinator friendly plants attracting many varieties bees, dragonflies, butterflies and hoverflies. Our garden partners Sustainable Wantage are very committed to protecting and enhancing the natural environment and our garden benefits from their knowledge. With the help of a local company, we recently installed a replacement compost toilet at the garden. All garden waste (and most food waste) is composted and reused within the garden. Bug hotels, ponds, bird boxes, log piles and hedgehog homes encourage biodiversity and wildlife at the garden. We are also mason bee guardians.

We host annual wildlife open days for the local community to learn hands-on about gardening for wildlife. In September this event offered wildlife crafts, pond dipping and bug box building. Working with local environmental group Wild Wantage, we hold wildlife 'Night-time Safaris' to help people learn about how to support garden wildlife and survey nocturnal wildlife at the garden. Trees are very important to the garden – we are currently extending a hedge using native species and have an orchard of productive fruit trees that are hugely beneficial to wildlife. We conserve water as much as possible – we have multiple water-butts for harvesting rain water across the site, we use watering cans as opposed to the hose as much as possible, and we mulch the garden to avoid water loss.

SeeSaw

Ref: SRev25-27/43

Financial Review

Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.

Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.

SeeSaw has 25 years' experience of successfully generating income to support our services from a broad range of sources and loyal donors. We have had periods of growth and retention over that time, and the Covid pandemic and cost of living crisis highlighted the fact that we need to remain adaptable to changing circumstances. Our policy is to maintain funds at a level which ensures we can continue to provide our service, meet all obligations to staff and other stakeholders and carry through our strategic plans. We recognise that income is not guaranteed until we receive it in our account. We start each financial year with a small amount of promised income from multi-year grants, requiring cautious forward planning. Although a large proportion of our funding is not secured in advance, our regular givers and support in the community have ensured our financial viability year on year.

In order to ensure that we are not reliant on one funding stream, our work is traditionally funded from the following sources:

- Trusts and foundations
- Individual donations, regular giving and gift aid
- Legacy and In Memory giving
- Corporate fundraising and donations
- Community Fundraising and events
- Public Sector grants.

SeeSaw is well supported by the community in South Oxfordshire including local businesses, sports clubs and Round Table groups. The Wallingford Vehicle Rally also raises vital funds for our service each year.

As we do not charge for our services, SeeSaw is fully-funded by donations and strong financial management is key to the sustainability of the service. As much of our income is unrestricted we are able to direct these funds to where they are needed most. Through careful management of funds during the peaks and troughs of fundraising, we will manage the demand for support ensuring that all bereaved children in South Oxfordshire that require support will continue to have access to it. SeeSaw's Finance Officer and Finance Sub-Group work closely with program managers to allocate funds efficiently, ensuring that every donation directly benefits the children and young people we support.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

SeeSaw has a clear strategic plan which is reviewed regularly and adjusted in line with operational priorities and cash flow. As a small organisation we can be quick, flexible and responsive to changes. As the population of Oxfordshire is predicted to grow and become more diverse we adapt our services. We have invested significantly in creating accessible resources and content that can be used by any bereaved family as an alternative to, or alongside, our face to face and telephone support, in order to meet demand.

Our Finance Officer plays a pivotal role in the organisation financial stability and we have recently received a 3-year grant from BBC Children in Need to cover the salary costs of this post. By maintaining transparent and accurate financial records, the Finance Officer enhances donor confidence and trust, which is essential for securing ongoing support. Securing the costs for this post until November 2027 helps provide financial stability into the future.

To meet inflationary cost increases and clinical staffing needs, we require income to grow steadily over the coming years. We have invested in our fundraising team, who will be focussing on the most profitable income streams, improving our donor engagement and strengthening digital fundraising. We have a robust supporter relationship management plan in place, which engages with our donors and encourages repeat giving. We build strong relationships with our grant-givers, ensuring they remain up to date with our work and providing detailed reports on how funds have been spent. This approach has secured many repeat grants, providing valuable income. We also have a communications plan aimed at both engaging with our current donors and attracting new ones, through strong, authentic story telling.

Over the next two years we hope to have our reserves back at 9 months, the target we set for strong financial stability.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

In 2021-22 our fundraising income was impacted by Covid. We also had a vacant Fundraising Manager role for part of the year making it more difficult to respond, and leading to a deficit in the year. Our reserves policy is to keep 9 months of running costs due to our reliance on fundraising, however we were required to use some of the available reserves to manage this situation in the short term.

In 2022-23 the cost of living crisis hit us with rising costs. Prudent financial management and a strategy focused on sustainability meant we needed to cut costs in order to balance our budget. We chose not to replace a member of the clinical team who retired, running at reduced staffing capacity. To continue to meet our key service priorities we reduced our service offer, suspending our service for deaths outside the immediate family, other than via on-line resources. During this year we were able to breakeven as income generation returned to pre-Covid levels and beyond. This was in part due to support from new grant funders.

In 2023-24 we generated a surplus and were able to begin replacing reserves used in 2020 - 2022. We currently have 8 months funds in reserves (slightly below our target of 9 months). We have continued to reduce some activities to manage costs, however we hope to reinstate services within the next 12-24 months if funding allows.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

It is estimated that there are currently 2,250 children in Oxfordshire bereaved of a parent or sibling at some point in their childhood. Around 350 children in Oxfordshire are bereaved of a parent each year, although the lack of official collection and recording systems means this figure is likely to be higher. The Childhood Bereavement Network believes that all bereaved children and their families should be able to access high quality support easily, wherever they live and however they have been bereaved. However there is no statutory support for bereaved children in the UK. SeeSaw is the leading provider of bereavement support services for children and young people in Oxfordshire, aiming to address this need.

Last year we worked with 66 children and young people in South Oxfordshire. We estimate that we will work with a similar number for the next 2 years, but due to the forecast of a growing population in South Oxfordshire we anticipate those figures may be higher. We use census data, population forecasts and our own data to estimate demand.

All services provided by SeeSaw are offered free of charge to our beneficiaries. For some families this means they can access a professional service that would otherwise be beyond their reach.

To meet the growing needs of South Oxfordshire's expanding and diverse population, we have increased the number of resources available on-line, offering immediately accessible advice to everyone in the community. Alongside written resources we have produced informational, short films about aspects of children's grief providing vital resources in a format to assist those who may not access written materials, with subtitles and transcripts.

Our service is always flexible, 'tailor-made' to children and young people's needs and scaleable as, due to the nature of our work, we can't predict what the demand will be for our service.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

SeeSaw provides a bespoke service for bereaved children and young people; it is always informed by their needs and wishes, using assessment and review tools as we find a collaborative approach works best. We collect data from children and parents before and after intervention, using in-house assessment and review tools, as well as the Child Bereavement Services Questionnaire (CBSQ) to provide us with routine qualitative feedback. The CBSQ was developed by the Childhood Bereavement Network as a tool for use by child bereavement services across the country in order to evaluate the effectiveness of the service offered. We

are currently piloting an outcome measure which supports CYP to identify and set targets for the work and to measure their progress. Our hypothesis is that having a child-centred outcome tool and more agency in the work will improve outcomes for young people.

Many children and young people present with wellbeing and mental health needs, and have vulnerabilities in addition to being a bereaved child. We use a range of assessment tools to identify how we can adapt the work for them and to liaise with the professionals around them to ensure holistic support.

We have worked closely with our Youth Panel to ensure we are including the voices of our beneficiaries in our service delivery and resources. The Youth Panel were instrumental in producing a short film for bereaved young people entitled 'You Are Not Alone'. We also consulted with young people when we developed our Living after Loss booklet for young people to ensure it addressed issues relevant to them and included advice and feedback from them for other young people. We shared advice on our social media from a bereaved young person last year, as part of Children's Grief Awareness week and will be doing so again this November.

With the right information and support, teaching staff are uniquely placed to influence a child's journey through bereavement and help them to make sense of the chaos that surrounds them when someone they love dies. We offer a specialised service to schools to help staff understand how young people might react to bereavement. Schools may contact SeeSaw if they require support with a student who they believe is struggling to cope following a bereavement. On these occasions we may offer advice and resources to staff, together with 1:1 support with the young person directly.

We work closely with the local hospices and end of life health care professionals. We also share our learnings of how children and young people may react to bereavement with other professionals working with children, in order that they may have a better understanding of a child's grief. We are embedded in local support systems and professionals rely on us to be there to support bereaved children. We are often asked by medical and educational professionals to provide training on the needs of bereaved children and young people.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

SeeSaw has prioritised equality, equity, diversity and inclusion in our strategic plan. Our current 3-year service strategy has been focused on accessibility and inclusion. We have developed new and differentiated versions of resources to improve accessibility, and have ensured all aspects of our service offer are trauma informed. Thorough assessments enable us to design and deliver support which meets the needs of individuals and is accessible and inclusive for those with Special Educational Needs and Disabilities, as well as those who are neurodiverse.

We have embarked on a programme of resource review and rewriting to ensure we are communicating inclusively – carefully choosing our language, images and checking for implicit assumptions and making sure we are representative of the community we serve.

SeeSaw is firmly committed to equality in all areas of its work. We believe that we have much to learn and profit from diverse cultures and perspectives to make our organisation more effective in meeting the needs of bereaved young people. We are committed to developing and maintaining an organisation in which differing ideas, abilities, backgrounds, and needs are fostered and valued, and where those with diverse backgrounds and experiences are able to participate and contribute. SeeSaw recognises that certain groups and individuals in our society are disadvantaged because of discrimination and is committed to the elimination of discrimination in all its forms. SeeSaw's codes of practice in employment and service delivery are designed to promote equal opportunities and to counter and prevent discrimination.

SeeSaw's support is open to all children, and their families/carers, who are living in, or in education in, Oxfordshire, regardless of race, sex, religion or beliefs. All grief support provided by SeeSaw is offered free of charge. For some families this means they can access a professional service that would otherwise be beyond their reach.

We have taken the following steps to progress in the areas of diversity, equality and inclusion:
We involve our service users in the design of our services and benefit from a Youth Panel made up of young people who have benefited from our grief support. The Youth Panel have helped create resources produced by young people for young people, communicating in the way that they prefer and respond to, ensuring we remain well placed to meet their needs.

We continue to look at new ways to ensure under-represented members of the community are aware of our services and are adapting our resources to better meet the needs of the diverse population of Oxfordshire in the following ways: ensuring our literature and resources are inclusive of all faiths; offering options on how our services are delivered including by telephone, text, voice call or self-serve online resources, to suit the needs of each individual; producing informative short films about aspects of children and young people's grief in a format to assist those who may not access written materials.

We provide staff and trustees with Equality and Diversity training from an external provider.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Each quarter we produce reports on our service activity. We can see the kind of activity and compare it with previous quarters and previous years. It allows us to map trends. It also includes demographic data so we can see demand by area, by age, by ethnicity and by additional needs.

Annually we use this data and compare it against the census data as well as Oxfordshire data on ONS Insights and Joint Strategic Needs Assessments. We can see where we may have sections of the community who are not represented and can explore how to address this. Each year we have a Strategy Day where we will look at this in more detail and adjust our strategy in response to the data.

Alongside the data analysis we survey all those who we have supported and collate their responses. These surveys focus on satisfaction, accessibility and meeting need. We use progress measure surveys to check for outcomes and impact. We review these measures regularly and implement changes to our service in response to feedback. Recently we had some feedback about our Early Support offer being unclear and in response we have developed new information resources to improve this. Feedback in response to this new resource has been very positive.

We also collate testimonials and stories which helps us understand how we have met the needs of our users. Such as this example of a testimonial from a parent following support given to her bereaved son who has special educational needs: 'He doesn't form relationships with new people easily and can be quite 'stand offish', but he's built a trusting relationship with you more quickly than I've ever seen - he has a strong sense of 'coping' and how he wants to be perceived, and he's found your open and practical approach really helpful.'

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

66

Please explain how you have determined the number of beneficiaries.

We have determined the number of beneficiaries based on the number of children and young people living in South Oxfordshire who directly benefited from our support last year. We keep records of all our beneficiaries including their home address which allows us to determine this figure. We have not included indirect beneficiaries such as school pupils, teachers or parents/carers.

As our support is for children and young people following the death or terminal diagnosis of a close family member, we cannot accurately predict the number of beneficiaries we will support in a particular area from one year to the next. However on average we support around 500 children and young people each year across the county. In our last financial year, 66 of these children and young people supported lived in South Oxfordshire.

Please describe who will directly benefit from your services/activities.

The services will benefit any child or young person in South Oxfordshire, age 0-18 inclusive, who has been bereaved of a close family member or has a parent or sibling who is terminally ill. The service will also benefit the parents/carers of these children and young people, and professionals working with them, helping them to understand children's grief and how they can support a bereaved child.

Those who access our service will directly benefit but we also offer a range of resources – all free to access – which means that many more people benefit. The number of bereaved families our support reaches is higher than our direct service figures.

We provide advice, training and support to those around bereaved children and young people to enable them

to understand and support them. Bereaved young people have told us how much of an impact it can have on their emotional wellbeing to be supported by teachers who know and understand what they are going through. Our service to schools helps staff understand how young people might react to bereavement and what strategies can be used to support them in the classroom. As well as schools we advise children's social care, counselling and wellbeing practitioners, health professionals, faith leaders.

The number of bereaved children in South Oxfordshire is not collected however it is estimated that there are currently 2,250 children in Oxfordshire bereaved of a parent or sibling at some point in their childhood. Around 350 children in Oxfordshire are bereaved of a parent each year, although the lack of official collection and recording systems means this figure is likely to be higher.

Each child we support presents differently, however they commonly report feeling frightened, lonely, angry or confused and may be struggling to function normally at home or at school.

We have a number of highly skilled volunteers living in South Oxfordshire who deliver our support work to families within their own community. We try and use volunteers local to the area a bereaved family lives in. Those volunteers not only support bereaved families for SeeSaw but contribute to the dissemination of knowledge amongst their networks, thereby increasing understanding of the needs of bereaved children and young people at a grassroots level.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Although grief is a natural reaction to bereavement, the death of a parent or sibling is classed as an Adverse Childhood Experience which can lead to longer term poor outcomes. Research shows that one third of bereaved children fall into the 'at risk' category for emotional and behaviour difficulties within 2 years of the death. Bereaved children are one and a half times as likely than non-bereaved children to have a psychiatric disorder and more likely to report depressive symptoms and have clinical levels of anxiety. They are also more likely to have a serious illness requiring hospitalisation during their childhood. Studies also indicated that children bereaved of a parent before the age of 16 are more likely to be excluded from school, be unemployed at the age of 30 and are over-represented in the criminal justice system. However, SeeSaw strongly believes that grief is a natural reaction and that, with the right support from those around them, most children do well.

Through our support, bereaved children and young people learn to manage their grief, reducing the risk of longer-term poor outcomes. This reduces the likelihood of needing support from children's services, CAMS or additional support at school. They are also less likely to require medical interventions and hospitalisation or get into trouble with the police.

Young people can return to SeeSaw for support at any point up to, and including, the age of 18, ensuring help is available to them as and when they require it. We also have a range of self-serve resources available on our website for children, young people and families. This provides additional, immediate, age-appropriate support at the time of need.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Children do better when their grief is acknowledged, when they have age-appropriate information, when they can ask questions, when they can talk about how they feel when they want to, when their feelings are validated, and they can talk about and remember the person who died. Work that focuses on supporting families to do this work together mitigates against longer term adverse impacts, as it builds resilience, models communication strategies and coping behaviours and reinforces the validity of their lived experience. This is the work SeeSaw does.

We monitor the success of our work against child bereavement service outcomes as defined by the Childhood Bereavement Network, we use Child Bereavement Service Questionnaires (CBSQs) to gather routine qualitative feedback, which helps us to shape and deliver our services. We are currently piloting an outcome measure which supports CYP to identify and set targets for the work and to measure their progress. We hope to see that having more agency in the work will improve outcomes for young people.

After receiving timely and age-appropriate grief support, we expect our beneficiaries to be moving towards the following outcomes, as defined by the Childhood Bereavement Network framework:

- Able to recognise their feelings and accepts them as valid
- Has age-appropriate information about the death
- Has a range of coping skills
- Able to access memories about the person who died
- Feels able to express their thoughts and feelings
- Feels able to tell the story
- Able to deal with difficult memories
- Able to function at home, school and with friends
- Has confidence about the future.

These outcomes are achieved over a period of time and can be revisited. Grief is an ongoing process and the work to heal builds over time. In the longer term we would expect our beneficiaries to feel in control of their grief and be adjusting well to a changed life.

We also record outcomes from on-line satisfaction survey following support. We expect young people to record one or more of the following outcomes:

- I feel better able to understand my grief
- I feel more supported with my grief
- I feel better able to manage my grief
- I feel reassured about my grief.

For those around the bereaved child (parents, family, friends and professionals) we expect them to record one or more of the following outcomes:

- I feel listened to
- I felt reassured
- I had more ideas to help support my child
- I understood my child's grief better
- I felt more confident in supporting my child
- I felt I knew what to do and say next
- I noticed my child and I were able to talk about what was happening
- I noticed my child and I were able to talk about how they felt.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

SeeSaw is a local charity, responding to the needs of our community, and we believe strongly in partnership working. We work with most schools across the district, CAMHS, Children's Services, Oxfordshire Youth and local healthcare providers.

SeeSaw is part of the Child Death Overview Panel and is often asked to attend Joint Agency Review meetings when a child dies, to provide immediate support to nurseries, schools and professionals as well as to siblings in the family. SeeSaw is a member of the Suicide Multi Agency Group, and we recently produced a booklet for families when a child is bereaved by suicide, funded by the group, which is available to all. SeeSaw works closely with the palliative care team at Oxfordshire's hospices to offer support for children and young people when someone in the family is dying.

We are embedded in countywide support systems and professionals rely on us to be there to support bereaved children and young people. We provide advice and guidance for professionals who already have a good working relationship with children and young people, attending multi-disciplinary meetings to consider how bereavement needs may be met in the context of the team around the child.

In SODC we have approached several organisations to strengthen our engagement with them and raise awareness of our service. For example, we are keen to reach bereaved boys and fathers and have reached out to The Cornermen, in Didcot, to discuss how we can collaborate.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

SeeSaw is committed to working in collaboration with our partners to ensure we are able to adapt our services to best meet the needs of our beneficiaries.

For example SeeSaw works closely with the Child Death Overview Panel and Public Health to ensure the

service we are offering meets local needs. As a result of a very high-profile incident involving the deaths of several young people in South Oxfordshire, we approached Public Health to discuss the development of a peer death school-based intervention. In collaboration with, and funded by, them we have developed new resources and will be launching this piece of work in January 2025.

Commissioners and funders who support our work do so because they can see it meets a local need, is effective and relatively low cost. We can innovate new services quickly and are always responsive to feedback from our beneficiaries. We work alongside statutory bodies and other local voluntary services to complement the work they do. In our new Service plan to be launched next year we will be focusing on working with organisations supporting parents, specifically parents from minority communities and those underrepresented in our service.

By continuing to develop our services and respond to local need, we are able to attract funding from donors looking to support the emerging needs of the local community. Much of our funding comes from Oxfordshire residents, business and trusts. We are very much a local charity, supporting the needs of the local community, working in partnership with local organisations. By offering a specialist, local service we are able to build strong relationships with our community. And through communicating effectively with our donors and reporting on the impact their funds have made, we have been able to fund and develop our services for 25 years. This is the strategy that we have going forward. To remain the leading provider of grief support for children and young people in Oxfordshire, adapting to meet the needs of the local population,

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

SeeSaw aims to act with the impact of the environment in mind. As a charity we have a responsibility to balance our environmental aims with the need to use our funds responsibly.

We have been hybrid working since 2020 which has significantly reduced emissions as staff no longer have a daily journey into Headington.

Some of our staff and volunteers are choosing to use public transport or cycle rather than drive to work or appointments.

We have switched our energy supplier to Good Energy, a company that ensures all energy is 100% renewable.

We recycle our office waste and dispose of ink cartridges through a recycling scheme.

We have switched to green office supplies such as toilet roll and dish washing powder.

Careful consideration is given to fundraising equipment, and we no longer purchase balloons or small plastic items.

The small rear car park is gravel which allows for some soak up of rain water, keeping a patch of grass where we use seeds each spring to encourage a small number of wildflowers to grow.

We ensure that lights and heating are switched off when the office is not in use.

Staff are encouraged to bring new ideas or suggestions for procurement to team meetings and we continue to research the environmental credentials of companies from whom we may wish to purchase products.

We regularly review our environment policy to ensure we are doing the best we can with to reduce our carbon footprint.

<p>The Maple Tree</p>	<p>Ref: SRev25-27/59</p>
<p>Financial Review</p>	
<p>Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.</p>	
<p>We have developed a broad range of income streams, as we consider that this is the most prudent way to achieve our target income and, each year, we raise some funds from all of these. We always carry out a time/benefit analysis to try to make sure that we are focussing our time and resources on the income streams which are most likely to yield the greatest benefit. These include the following:</p>	
<p>Donations from centre users - we ask for a voluntary donation of £2.50 from each family at each session.</p>	
<p>Fundraising events and activities - we run an annual programme of events, although this is dependent on capacity. These include an annual summer fete, Christmas tree sale, participation in the local Christmas market and sponsored events, together with other, one-off, activities that are focused on income generation as well as raising awareness in the community and working with other local groups, eg. a Silent Auction open to all and a Christmas wreath-making evening.</p>	
<p>Grant applications - these make up the largest contribution to our annual income. We are constantly engaged in seeking grant funding opportunities from charitable trusts and foundations, County and District Councillors, and other organisations, such as Awards For All (National Lottery). Without these, the charity would not be sustainable.</p>	
<p>Family learning - when capacity allows, we run some after school and holiday activities for families and young children that we charge a nominal attendance fee for. We also recently ran a course of cooking workshops, which were extremely popular.</p>	
<p>Friends of The Maple Tree - this is a regular donation scheme for supporters. We have a number of supporters signed up, who make a regular monthly donation to the centre. We would like to expand this scheme further.</p>	
<p>Parish Councils - we apply each year to the Parish Councils in our area for financial support.</p>	
<p>Hiring out the premises - we rent out the Maple Tree to local families for events, such as family birthday parties, and we also have a small room that we currently rent to Health Visitors, who run regular clinics from our premises. Another aim is to advertise the room as a meeting place for other small businesses or organisations.</p>	
<p>SODC lottery and shopping cashback - The Maple Tree is registered with the SODC's "So Charitable" online lottery and with "easyfundraising" and we receive a small regular income from these initiatives.</p>	
<p>Local community support - we also raise funds from collection tins in local premises, donations from local employers, collections by local societies who wish to support us and one-off donations from local individuals. We have recently added a donation button to our website.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.</p>	
<p>We will hold an annual fundraising planning meeting, at which we will consider at length our budget targets for the next financial year and create a fundraising plan for the year, outlining separate targets for our various different income streams, eg. session donations, fundraising events, grant applications. We will then meet quarterly (once we have quarterly figures available) to assess our progress against these targets.</p>	
<p>We would also like to increase our trustee board, to recruit at least 2 more trustees with fundraising experience, or who are able to assist in fundraising. This would give us more capacity to apply for grant funding.</p>	
<p>This year, we are setting up a parent fundraising group, the aim of which will be to organise fundraising events and activities, in collaboration with the trustees.</p>	

We would like to expand our Friends of the Maple Tree scheme, to provide an increased regular income. We consider that we have a relatively diverse range of income streams, however, we will consider whether we can add to this. We have recently started to develop a relationship with Brookes University, who have offered to help with marketing and we are exploring whether we can improve and monetise our digital marketing in some way.

We have recently added a "donation" button to our website and we will need to advertise this.

We are often in discussion with our local County Councillor and Oxfordshire County Council about whether they are able to provide any regular assistance. For example, they have granted us a rent holiday for the past 3 years (otherwise our annual rent payable for use of the premises is £10,500 and is likely to rise), and we have been in discussions about whether there is any room for negotiation to reduce the rent payments. We have also met with our local MP to discuss funding, amongst other matters.

We are also considering whether there are any other models that would be appropriate for us, as a small charity, but we lack the capacity to employ a fundraiser at present. We are hoping to engage with some mentoring with a local charity, with the main issue that we wish to obtain some advice on being around sustainability and funding.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Covid-19 had an immediate effect on our finances, in particular on our income streams. We were forced to close the centre for lengthy periods in 2020 and 2021 and so funding from planned fundraising events, donations from families attending the centre and income from renting out our premises ceased. However, we managed to replace this income through various means, including sponsorship events, a direct appeal to our supporters and other online events, and we were successful in obtaining grant funding specifically related to pandemic losses. During the lockdowns, we managed to save on staff costs by furloughing a member of staff and delaying recruitment to replace another member of staff who had left. We were fortunate that we did not have to use any of our reserves, which was largely possible because of the Covid-related grant funding that we were able to secure.

We have found since the pandemic that our general running costs have increased substantially, largely due to inflation and cost of living. For example, cleaning, gas and electricity costs and the cost of resources, including food for snacks in our sessions, have all increased, particularly in the last 2-3 years. We have not had to use our reserves or reduce our service, however, the ability to continue to raise the funds that we require year on year to keep the centre afloat is entirely dependent on the goodwill of volunteers and trustees, who work during their free time to help in group sessions and to raise funds. All of our fundraising is currently undertaken by a small group of 5 trustees and, in the current climate, in which so many other causes are competing for funds, this is extremely time-consuming. During 2024, two trustees (including our fundraising lead) have resigned from the board, both due to personal circumstances, but support the centre where they can in a voluntary capacity, and this will significantly affect our fundraising capacity until we can recruit additional trustees to assist with fundraising.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

There is a lot of publicly available information which shows that giving children an early start to physical, cognitive and emotional development is beneficial for their future growth. The Royal Foundation Centre for Early Childhood states "The world in which a young child grows up shapes the way their brain develops. The key to a health future is a healthy start." The need for our service in the area has long been well-established, as The Maple Tree was run by Oxfordshire County Council for many years before it became a charity when funding for the centre was withdrawn. There is no other similar service within our core catchment area. Over 440 families used the centre last year because we are meeting their needs.

We run 7 -8 sessions a week, which are very well-attended, which we believe is clear evidence of need amongst young families.

We have many rural villages in our area families in these more isolated areas need a support network and the means to socialise.

Families tell us that we are a vital service to them. In a survey conducted in June 2023 91% of respondents said that The Maple Tree had helped with their child's development and learning and 82% that it had helped with their child's communication skills. We have attached some testimonials which show evidence of the need for our services.

We recognise that some families may fall through the safety net of family support. Our staff are fully trained in responding appropriately and enabling access to appropriate support and so can meet various needs before they become a more severe problem. We have supported families going through the adoption process both prior and once the children have been placed with them. The feedback has been that our support has been vital to them.

We are constantly discussing with users and partners in the community how we can best address need. We hold a database of our registered users and we ask them to sign in each time they attend. We constantly evaluate this data in order to tailor our service to the perceived need. We work in collaboration with our local nursery and primary school, for example, and there is strong evidence that many children have delayed development due to a lack of social play, interaction and communication during and since the pandemic, and so we have introduced specific sessions to focus on this, such as our weekly language and communication session. Our play sessions are based on the Early Years Foundation Stage and help parents and carers understand how they can best support their children's development at home.

We keep abreast of local developments and are aware of the long term plans to build residential housing on the old Brookes University site at Holton, which is in our core catchment area. We will therefore tailor our activities to accommodate the likely influx of young families, which will increase the need for our services.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

As stated above, we regularly ask for and receive feedback from the families who use our centre and staff produce evaluation forms for the sessions they run. We ask families about the impact that they feel the centre has had on them and their children, and this informs how we tailor our programme of sessions. We also ask for suggestions as to what they would like us to provide and we use this to plan our sessions and programme. For example, our group for families with twins, which has now been running for 3 years, was introduced as a result of a specific request from some local parents. We are still running it, as there are still a significant number of families who attend. Likewise, our Saturday Family Fun sessions evolved following consultation with parents. This was originally a group for fathers to attend with their children, but, in a user survey, families told us that they would prefer a family session and so we changed it.

We also have a parent liaison group to feedback suggestions. We believe that discussions with parents are the best way to tailor our activities to users' needs.

We also consult with and value feedback and suggestions from our volunteers. They are invaluable in helping to deliver our sessions and often attend the same session each week. They are extremely helpful in offering practical suggestions to aid and streamline efficiency and practicalities in the delivery of sessions, such as setting up and clearing away and also the logistics of how we provide food and drink.

On a higher level, we consult with the local primary school and nursery to discuss general need, as we have explained above. In addition to offering the new language and communication session, in collaboration with the need identified by the school, for the past 2 summers, we have introduced one-off "Getting Ready for School" sessions for 4 year olds about to start school. Similarly, if local Health Visitors or midwives have identified a particular need, we welcome the opportunity to explore new ideas. In response to a suggestion from a health professional, we have started inviting expectant mothers to our baby session.

Feedback from our local community is also welcome. We operate a "Friends of the Maple Tree" donation scheme and update members regularly. We aim to hold an annual event for members for a wider discussion about the provision and delivery of our services, but we are happy to hold informal discussions at any time.

We also liaise with our parish council and will welcome any observations they may have about our service through their work in the wider community. We provide Wheatley Parish Council with a regular update and liaise with other local parish councils as resources allow.

We are also part of a networking group with other, similar children's centres, at which we can share ideas and best practice and use this to improve our service as appropriate.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Our sessions are open to any parents or carers with children under 5. We strive to be inclusive and to encourage socially isolated and less confident families to attend. Although we ask for a voluntary donation of £2.50 per family for each session, we are an open access centre and do not expect payment from any family who is unable to pay. We have outlined elsewhere in this application that we aim to collaborate extensively with both users of the centre and external bodies, such as health professionals and schools and nurseries to try and identify any need within the community so that we can tailor our services to all users.

We welcome families from all backgrounds, countries and those for whom English is not their native language and our staff and volunteers encourage respect towards anyone with a different background from themselves. Our aim is to provide a safe and secure environment, in which all of our users feel comfortable. When we had a group of migrant families regularly attending the centre, our staff encouraged them to mix with existing families to create a community.

Our staff are expert and fully trained Family Support and Early Years professionals and strive to create an atmosphere of warmth and friendship for everyone. All of our staff and trustees are familiar with our Equality Policy.

If families have a particular need that, with our limited resources, we cannot address, we will make every effort to signpost them to the appropriate professional or individual.

We also ensure that anyone who feels that they have been unfairly treated at the centre has a means by which to make a complaint.

We review and, if necessary, update, our Equality Policy annually to ensure that we are complying with best practice.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We conduct regular evaluation and ask for feedback from the families who use the centre, both through informal discussions and formal surveys. They tell us whether we are meeting their needs and give us suggestions as to how we can improve our service. Such qualitative data is extremely important as evidence of our impact and we encourage parents who wish to comment to send their comments to us as primary evidence. Sessions are planned with reference to the overall objectives of the group (which is based on a perceived need) and staff are given time to complete a short review of each session afterwards. These reviews provide (anonymously, if appropriate) comment on how children respond to the activities and on parent-child and parent-parent interaction and these reviews are analysed regularly to ensure that we are making progress against our objectives.

At all sessions, staff keep a tick sheet of family support topics (see example attached) that have arisen during conversations between staff and parents during or after each session. Cumulatively, this gives a clear indication of the most prominent needs being expressed by parents and gives staff a steer as to topics that they need to be ready to respond to as well as any needs that require a greater response. This enables us to tailor our programme to meet those needs, by eg. developing some additional parenting support sessions.

Our formal surveys ask parents for their levels of satisfaction with the centre, our programme and what could be improved. This gives us a valuable insight into whether we are meeting the needs of users. If needed, staff will hold informal conversations with specific families, including vulnerable families, to "check in" and make sure they are providing the appropriate support.

All of these ways of monitoring and evaluation help us to identify the levels of progress against our objectives and whether we are successfully meeting the needs of users. We also hope that regular attendance by families is also an indication that their needs are being met and we measure this by registration at each session.

We recognise the challenge in collecting information relating to the community as a whole to understand whether there are any unmet needs. We have working relationships with our local Health Visitors, local primary and secondary schools, Wheatley Nursery (which adjoins our premises), local pre-school and after school clubs and the local network of voluntary children's centres in South Oxfordshire and this range of partners also enables us to research any local unmet needs in the wider community, as well as providing a

more holistic, coordinated and consistent service.

We would like to undertake more research and consultation with professionals and services to ensure we are effectively identifying the needs of our existing users and other young families in the area and how we can provide the highest quality service to them, giving them the support they need. However, this is dependent on obtaining more funding for staff time in carrying out the necessary research.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

720

Please explain how you have determined the number of beneficiaries.

We have looked at our attendance figures as a whole for the financial year 2023-24. A total of 441 families were registered with us and used our services. We have an electronic system for capturing data and require families to register with us and to sign in each time they attend session. This enables us to record the total number of users at the centre and also how regularly families attend. This also enables us to capture data relating to the number of users from different postcode areas.

We have deduced from this data that approximately 240 of the families registered with the Maple Tree live in the South Oxfordshire district, which equates to 54% of the total. Others come from Oxford, as far afield in Oxfordshire as Bicester, and from villages in Buckinghamshire.

We have estimated the number of 720, as our services often directly benefit 2 or 3 members of the family, as it is often the case that more than one adult will attend with a child over the course of the year (eg. two parents may bring a child to different sessions). Other extended family members, including grandparents also sometimes attend with young children, and so would also benefit from coming to our sessions. Some families may bring more than one child with them, for example, a baby and a toddler, or older siblings in the school holidays. It is also the case that a whole family may benefit from our service, even if not all of the family members attend regularly, as a result of the learning, relationship building and parenting skills that are offered.

On this basis, we believe the estimate above is a conservative one.

Please describe who will directly benefit from your services/activities.

Our main beneficiaries will be young families with children aged under 5 in Wheatley and the surrounding villages. We aim to ensure that our users include residents from smaller villages as well as the larger village and nearby towns, such as Thame. We deliver all of our sessions from premises in the wards of Wheatley and Forest Hill and Holton, but also, especially in the summer, run sessions in other villages. We also serve residents from other wards who are able to travel to our premises.

We are open to all families with children in this age group, including carers and other relatives, such as grandparents. We offer some activities for older children during school holidays.

Our area includes a number of rural villages and we therefore try to reach those who are more isolated, through factors such as lack of transport. Our outreach session in Forest Hill caters for some of these families.

There are vulnerable and economically disadvantaged families within our area and we try to reach them through our relationships with health professionals and the local primary school and nursery, in order that we can support them. However, we do not currently capture sufficient data on individuals and families to be able to state what percentage of our overall users they make up. They make up a minority of the users that attend the Centre, but we are always looking for ways to increase our reach.

We welcome children or adults with additional needs.

We have supported a significant number of migrant families over the past 2 to 3 years, mainly from Ukraine and Afghanistan. For some time, a group of around 60 migrant Afghan families were housed in a local hotel. Through our relationship with Asylum Welcome, we were able to offer them support, both at the hotel and regularly at The Maple Tree. Although this group of migrants have now moved out of the area, we continue to liaise with local organisations and have been approached to support a "supper club" for some migrants who still reside locally.

We are also very happy to support other families for whom English is not their native tongue.

Other members of our community benefit from our activities, as we try to organise fundraising and other events that will engage groups in the community who do not usually attend the Centre. For example, we have a new care home in Wheatley and we are looking into ways in which we can collaborate to mutually benefit our young families and their elderly residents.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

We are providing a service in our community that is not currently provided by SODC or any other Council, since the removal of funding for Sure Start centres in the county. However, we believe that our service complements council services in the ways in which we contribute to the SODC Corporate Plan, in helping to develop and maintain a thriving and healthy community. We have set this out in more detail in the relevant section of this application, however, in summary, we believe that the service and support that we provide improves quality of life, confidence and self-esteem for residents, more resilient families and thereby the wellbeing of the whole community. This is likely to reduce the need for Council intervention generally and also in specific cases, where we are able to offer advice and support or signpost families to the appropriate help. It also aids early intervention in potential cases of post-natal depression in new parents.

We are also mindful of the Council's objective in tackling climate change and our responsibility to protect the environment and this is one of the aims in our 3 year Strategic Plan. This is updated on an ongoing basis. We have a number of initiatives in place to increase sustainability and provide more learning opportunities in relation to the environment and the natural world and we have set these out in more detail in the section on tackling climate change in this application. One major piece of work that we hope to carry out this year is to complete a sustainability plan, which will be reviewed each year.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

The funding will contribute towards staff costs, so that we can continue to run high quality, focussed play and learning experiences with young families and provide a hub which enables families to feed supported and to build relationships. It will also enable us to continue to strengthen collaboration between our staff and other professionals and organisations, in order to increase our reach and provide advice and learning for parents.

This will help families feel able to support their children's development in their formative years, whilst also making connections and increasing their confidence, mental wellbeing and resilience. Participating in our groups will help children to socialise and learn and equip them for the next stage of their childhood, and nursery and school. The opportunity to attend our groups will enable parents from more rural isolated areas to meet other parent and build support networks. All of this also acts as a preventative safety net, reducing risks to health and wellbeing through early intervention.

Our service makes a significant contribution to establishing and maintaining a thriving and healthy community. Building positive, supportive relationships with other young families, learning new parenting skills and sharing experience will have a significant positive impact of health and wellbeing, both physical and mental. This increases both quality of life and self-esteem. Children who are equipped for nursery and school will have a greater positive impact on the community as they continue to develop. Support and advice for new mothers can also help to manage any early signs of post-natal depression, leading to better wellbeing overall. Our service helps to provide a network of community-based support for all young families and those which need greater support are able to access it.

Our collaborations with health and other professionals helps to improve learning and development and, with this, the life chances for young children.

Overall, stronger, confidence and more resilient families will lead to greater social cohesion within the community, as they connect and build networks and support each other. This leads to thriving and happy communities.

Through running our sessions, relationships with volunteers and professionals and programme of fundraising

in the community, we also believe that we offer other community groups and members of the community of all ages who do not attend the centre the opportunity to work together, meet new people, learn new skills and reduce isolation. This also leads to a more connected, thriving community.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

We have always collaborated extensively both with our users, other professionals and organisations in the planning and delivery of our services and will continue to do so. We have already described that we work closely with Health Visitors and the local primary school and nursery to determine the particular needs of young families so that we can tailor our programme accordingly and many of our sessions (eg. our new "Celebrating Sounds" language and communication group) have been introduced as a direct response to their feedback. One of our trustees set up a liaison group with representatives from both settings with the aim of working together to support children as they transition to nursery and school. We have offered coffee mornings for school parents to build relationships and we are also looking at ways that we might deliver any further training or advice together. Our "Getting Ready for School" sessions were also introduced in collaboration with the school and nursery.

Our ongoing consultation with families who use the centre forms a fundamental basis for how we structure our programme of sessions and the different learning opportunities that we provide and we have already provided evidence of how we adapt our service to address identified needs.

We have also been involved in an externally-led consultation about how we can improve our listening to parents and families within and beyond the centre and tailor our services to address any unmet needs. This was paused temporarily whilst some staff changes happened, but we aim to complete it shortly.

We currently have a new initiative with Abingdon and Witney College and are collaborating to provide some workshops for parents. The first will take place in November and will be a joint workshop on behavioural issues in young children and this will be provided free of charge. There are plans for more next year, including one on Special Educational Needs in young children. We will ask for feedback from families to determine which areas are of most interest and need.

Our centre manager is a member of the South Oxfordshire network of children's centre charities and she attends meetings 2 or 3 times a year. The purpose is to collaborate to exchange feedback and suggestions about best practice, perceived needs and how we can offer the best service.

The SODC plan to develop the old Brookes University site in Holton will bring a considerable number of families into our core area. Once more information about the development has been received, we will ensure that we liaise with local health and other professionals, both to promote the centre and to consider how we can best serve the new families.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

We will continue to partner local organisations when we can to plan and run fundraising events. Eg. we join with our local Scout group to sell locally-grown Christmas trees and we have previously run a fundraising event in collaboration with a local community group (the Wheatley Society), which raised over £1,000. We hope to collaborate together again next year to run another event. This helps us to achieve our fundraising targets and also to raise our presence in the community amongst people who are not users of the centre.

We are also exploring a collaboration with Brookes University, who have offered to assist with marketing our services and we will be discussing ideas with them, including improving our digital marketing and whether there is any opportunity to monetise our social media presence and/or reach companies and businesses who might be able to provide financial assistance in the future.

This year, we would also like to explore whether we can develop any relationships with local companies who may be able to provide some form of corporate sponsorship. This would be a new venture for us, although we have previously worked with our local supermarket, which has provided staff to volunteer at our sessions and events as well as donations of goods.

We will also continue to collaborate with Wheatley Nursery (which is next door to our premises) to explore whether we can offer any joint training or workshops and we regularly share ideas with other children's centres in the area with the aim of implementing the best ways of delivering our services, saving costs and increasing fundraising capabilities. Similarly, as part of the network of children's centres in the area, our manager is exploring whether there is any scope for sharing resources and delivering joint training to save

on costs.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We consider sustainability and our commitment to protecting the environment and tackling climate change as one of the priorities in our 3 year strategic plan. On our action plan this year is the completion of a sustainability plan to document our use of energy, resources and materials, and explore whether there is any more that we could be doing to move to using more sustainable resources. However, as we are a small charity with very limited resources, we need to bear in mind the cost of implementing new systems and using different resources. For example, as the need to purchase resources, such as toys, arises, we will look at the most sustainable options. We will review the sustainability plan on a yearly basis.

We aim to recycle as much waste as possible and we try to use recycled products in our sessions, eg. cardboard, paper. We offer a snack during our sessions, which is often mainly fruit or vegetables, and we compost food waste, such as peelings. We have collaborated with our local Fairtrade society in Wheatley, so that, where possible, we use Fairtrade products, such as tea and coffee. Our local society has deemed the centre to be a "Fairtrade Centre" and we will continue to collaborate with them as appropriate.

We run a Maple Tree Market, which is a platform for users to buy and sell good quality second hand items, such as clothes, books, toys and equipment. In welcoming donations of items that families no longer need, and passing them on to other families in return for a donation to the charity, we believe that we are promoting the recycling of goods that still have plenty of life left in them as well as raising money for the Centre.

A longer term aim is a project to develop our outdoor space at The Maple Tree, which currently consists of a small flat area for play with a steep grassy slope, which is available for children and families to play in whenever they wish during our sessions. We would like to make it a more user-friendly space and to create an all year round outdoor area for play and learning, using recycled materials for landscaping as much as possible. The space will include areas for wildflower planting and bugs as well as planting areas for fruit and vegetables and will provide the opportunity to teach young families about the natural world, how to grow food and protect the environment. We had hoped to carry out this project sooner, but have been awaiting approval from our landlord of the premises, as it involves a plan to re-locate a disabled access. In the meantime, we have undertaken some planting and in the summer we grow fruit and vegetables and tailor some of our sessions around this theme.

When resources allow, we offer some sessions in different locations in the area, which has the dual benefit of reaching more families and avoiding the need for them to drive to our premises.

Henley on Thames Churches Debt Centre	Ref: SRev25-27/60
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Financial Review

Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.

Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.

We have planned to balance the budget so that we will not have an interruption in offering all our much-needed services to local residents in need.

We are currently financially stable and have reached our maximum level of staff costs, save for inflation / cost of living increases.

If we are unsuccessful in obtaining the Council's Revenue Grant, then our contingency will be to redouble our local fundraising efforts.

Our services are popular with all local community leaders and we have excellent relationship with local press and so have an increasingly visible public presence.

Our 6 Trustees are 4 Church Leaders and 2 retired business Directors. We run all our operations with regular monthly staff meetings and quarterly Trustee meetings, all of which are well documented. We are financially prudent and have up to date cash flow projections for 2 years ahead.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

We have set up the Debt Centre on prudent financial principles so that we can continue to offer all our much-needed services without interruption to local residents in need.

We are currently financially stable and have reached our maximum level of staff costs, save for inflation / cost of living increases.

We are a virtual organisation in that we have no fixed office / premises costs.

Our main Debt Counselling is conducted in clients homes with a volunteer befriender accompanying our Debt manager or Debt Coach at all times.

Our 5 supporting churches allow us to use their premises and we pay charity room hire rates when needed for our Life Skills and Job Club courses.

Our reserves policy is to have a minimum of 4 months funding at all times.

We have secured long term funding support by a local charitable Foundation to pledge £20k a year for the next 3 years, commencing in May 2025, which gives us a high level of financial stability.

Our local fundraising has been very successful to date, and we have a strong Fundraising plan in place for the future to continue our track record of financial stability.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

We have successfully started up from scratch over 2 years ago in July 2022.

Our accounts for the years ending June '22-23 and 23-24 show a strong build up of our services, accompanied by successfully raising the income to cover all our costs and have healthy reserves.

We have steadily built up our services to pay 3 members of staff covering debt counselling for local residents in financial need as well as offering proactive services to help stop residents falling into debt with budgeting courses in addition to running a job club to help them find and keep suitable employment.

We have plans to expand our services by using unpaid trained volunteers but do not have any plans to

recruit any further paid staff, thus our costs are now plateauing, save for cost of living / inflation increases.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

We started the Henley on Thames Churches Debt Centre over 2 years because of the local need identified by Citizens Advice and NOMAD Community Charity. Attached is a summary of their analysis. Since we began Debt Counselling operations, we have delivered at our budgeted level of 2 clients per month = 48 clients over our first 2 years, which is evidence of the outstanding need that we are now meeting . Citizens Advice and NOMAD Community Charity regularly refer clients to us, together with NHS Social Prescribers.

Our services have expanded to be more flexible in how we support our local residents by running Life Skills to help residents budget and live healthier lives as well as start up a Job Club to help residents obtain and keep suitable employment. We are flexible in that residents can register for any of these courses and then progress to receive Debt Counselling, if needed, or commence with Debt Counselling and then select either or both of the courses. In addition, we identified that our clients required IT skills and have supported IT skills courses run at the local Henley Library.

In addition, the local Henley Schools have expressed interest in school leavers being better prepared for life after school by us teaching them basic Money Management budgeting skills. We are piloting suitable short Money Management courses in Autumn / Winter 2024-5, so that we can expand this service with support from our unpaid trained volunteers.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We commenced our Charity upon the request of local partners Citizens Advice and NOMAD Community Charity, who have regularly referred clients to us . In addition, we have worked closely with the NHS Social Prescribers to assist reducing the waiting lists at local medical centres where clients have an underlying need for our debt counselling / support services rather than medical conditions. Often debt/ bereavement / loneliness is at the root cause of clients concern for their well being.

Your definition of vulnerable/priority groups is an exact description of the type of clients we support. We get to know them , offering 1 to 1 support throughout all our programmes. In addition, we then keep in constant contact, inviting clients to meet us weekly in a social / church café setting, where we can continue to help them find support for their needs.

Attached is a sample extract from one of our Monthly reports to Trustees. All case work is summarised with clients referred to by case numbers rather than their names for reasons of confidentiality. The extract shows typical feedback by clients, revealing their vulnerability and how we are engaging with them by compassion and understanding.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation’s services/activities meet the needs of all users, including vulnerable/priority groups.

We believe that everyone should be treated with dignity and respect and in accordance with the law and best practice regarding equal opportunities.

We are an equal opportunities employer and we offer our services to all local residents without discrimination, regardless of their faith or none.

As previously explained, nearly all our clients can be described as vulnerable, requiring special care to meet their needs.

Our staff are highly trained to deal with vulnerable clients and recent training has included Special Needs such as Autism.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

All our Debt Counselling has a feedback system so we can establish how successful we have been in meeting clients needs. This feedback is highly confidential but we are developing a form of feedback

summary that can be more easily distributed to our community partners .

All our Life Skills and Job Club courses have regular feedback opportunities, and sample feedback has been included with this application.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

128

Please explain how you have determined the number of beneficiaries.

48 - Debt Counselling - we have a budget capacity to deliver 48 debt clients each year - A client can be a single person or a household
 20 - Life Skills course delegates - we have capacity to deliver 2 courses of 9 week duration with 10 delegates per course
 20 - Job Club course delegates - we have capacity to deliver 2 courses of 10 week duration with 10 delegates per course
 40 - school leavers - We plan to deliver short budgeting courses for school children in their leaving years in 2 Henley Schools with 20 delegates per year

In response to your guidance where "a local organisation is delivering the same service/activities as a national organisation or an organisation based outside of the district". we are affiliated to the National "Christians Against Poverty" who provide us with excellent resources and training , whilst we remain responsible for all our local staff and revenue costs. In 2023, the National "Christians Against Poverty" records "9,582 clients supported in debt counselling, of whom 2292 have become debt free and 4746 are working towards becoming debt free. There were 76 Job Clubs throughout the UK and 28 new Life Skills centres were opened, including our own in Henley.

Please describe who will directly benefit from your services/activities.

Our services are open to all residents, regardless of their faith or none but based upon their needs. Debt can arise due to ill health, divorce, redundancy, bereavement or misguided financial decisions, affecting local residents from all walks of life.

Debt Counselling is provided by applicants being referred by local organisations such as Citizen's Advice or Nomad Community charity where their need for expert debt counselling has been established. The national Christians Against Poverty charity also operate a free phone call centre where residents of RG9 can request assistance from us, with a triage assessment completed to ensure they are in genuine need of assistance. Many of our Debt Clients experience mental health issues due to overwhelming concerns on debt, with approximately 50% having considered suicide.

A typical client is facing severe debt often with the threat of bailiffs, eviction and looming bankruptcy. Our interventions helps them to restructure all their debts, often obtaining repayment schedules at beneficial interest rates over longer times to help restore financial stability.

Our proactive work to run Life Skills courses and operate a Job club is aimed exactly at those who are vulnerable, socially isolated or unable to operate a balanced domestic budget. In schools we have been asked to run budgeting courses for school leavers with Special Educational Needs to help their post-school choices

By definition all our clients are those who are 'vulnerable' including the elderly, isolated young families, homeless, economically-disadvantaged, educationally-disadvantaged, migrant groups, individuals with disabilities.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Our Debt Counselling service helps local residents regain stable mental health with freedom from crippling financial anxiety. This means a reduced reliance on the council for support services.

Life Skills and Job Club services helps local residents learn how to live on healthily a balanced domestic budget obtain, increased income from obtaining suitable employment to live healthy productive lives. This also means a reduced reliance on the council for support services.

Our work with School Leavers to help provide them with basic budgeting skills is designed to equip them

better for their life after school, to make more informed financial decisions and so become less reliant on the council for support services.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our fundamental reason for setting up the charity is due to our commitment to contribute to thriving and healthy communities.

We want our clients to become debt free and so live a thriving and healthy life.

Our support services of Life Skills and Job Club further the thriving and healthy engagement of our clients in the community.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

We work closely in partnership and not in isolation with local community organisations, including but not limited to:

- Citizens Advice
- NOMAD Community Charity
- John Hodges Charitable Trust
- YMCA
- Henley Municipal Trust
- Henley Educational Trust
- Henley Lions
- All local churches, leaders and congregations
- NHS Social Prescribers
- Local Henley Schools, including Gillotts

We are frequently referred clients by these organisations and / or we are able to signpost our clients to use their services.

Our first 2 years were focused on start up from scratch to build up our much-needed service delivery to local residents in need. We have now plateaued with our staff level at a Debt Centre Manager, Debt Coach and Life Skills / Job Club Manager, all working in collaboration with our local partners.

Our focus for these next 2 years will be to enhance the impact we achieve by measuring and consistently raising the standard of all our operations.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Our original plan was to develop our services by offering proactive support via Life Skills and Job Club programmes in addition to our core Debt Counselling service.

In collaboration with all our partners, we have been encouraged to further develop our proactive support by providing school leavers with Money Management skills, commencing with Special Educational Needs school leavers

We further plan to extend Money Management support to the General Public by more extensive use of unpaid trained volunteers, thus keeping our costs plateaued, other than cost of living / inflation increases.

These service developments are considered very popular with our community partners, help raise our public profile and should attract further donations to support our finances.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We share the concerns to protect our environment, combat climate change and preserve nature. Therefore, we have set up a virtual operation with no premises and low overheads, thus minimising our environmental impact.

We meet Debt Clients in their own homes.

Our Job Club and Life Skills courses are run on church premises, who are equally committed to environmentally friendly policies.

Our virtual organisation structure has no adverse effect on the environmental / Carbon/ Nature.

<p>Thames21</p>	<p>Ref: SRev25-27/47</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. The Environment Agency and Thames Water currently support Thames21 to co-host the South Chilterns Catchment Partnership, with projects in the catchment being funded through a range of sources, including from charitable trusts and foundations, private and public sources.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Thames21 benefits from an internal fundraising team, who successfully secure funding from a variety of sources and funders, as highlighted in the annual reports and financial statements provided. This ensures the charity's work is protected by a diverse and resilience range of income. The work enabled by this funding will also have the full support of the South Chilterns Catchment Partnership, with co-hosts raising funds for active and pipeline projects in the catchment. Catchment partnerships are well-documented in their success in securing funding from multiple sources. For every £1 directly invested by the government, catchment partnerships have raised an additional £3.50 from non-governmental funders, as well as £38.2 million of wider government funding.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. Thames21 was financially affected by Covid-19, as a result of national lockdowns and social distancing restrictions introduced by government. Therefore, several projects were paused until safe to resume and a reduction in income generated by corporate volunteering events was experienced.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. Local communities in South Oxfordshire deserve access to healthy, climate resilient blue-green spaces to utilise and enjoy. The numerous benefits of high-quality natural spaces are well documented, from providing free accessible spaces for leisure and recreation, to benefits regarding mental health and wellbeing. As such, the River Thames through South Oxfordshire is a valuable and treasured asset to local communities and attracts vast numbers of visitors annually. Through previous partnership projects, Thames21 has been able to expand upon the above benefits through connecting communities to their local green-blue spaces and inspiring long-term stewardship of them. Previous projects have included citizen science programs, training and upskilling local members of the community, offering opportunities to South Oxfordshire residents to support and advocate for their local blue spaces. Through this funding, Thames21 will continue and expand upon this approach to nature-based solutions in South Oxfordshire, involving local communities through the process of development and delivery to maximise project outcomes and success. An array of community groups is represented within the South Chilterns Catchment Partnership and decision-making processes, helping to form a network of local community groups across the district. Thames21 also benefits from an internal Engagement and Learning Team to draw further expertise from in relation to community engagement, co-design and outreach to facilitate ongoing community needs. As such, Thames21 has established resources to support community engagement within projects, such as engagement toolkits, to facilitate and deepen community involvement within a specific project or location.</p>	

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

The South Chilterns Catchment Partnership consists of a holistic group of stakeholders and includes a variety of representation in its catchment partners, such as statutory bodies, water companies, local authorities, NGOs, community groups, academics, business, farmers and landowners. This community-led catchment-based approach (CaBA) is utilised for catchment-wide thinking, planning and delivery, all centered around collaboratively decided partnership visions, aims and priorities.

Partnership working and collaboration are essential throughout project planning and delivery, in particular with the local communities the project will create impact for. Previous work has facilitated partner and community involvement through citizen science opportunities, community workshops, co-design events and presence at local fairs/events.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Implementation of the organisation's equalities policy ensures that Thames21 staff receive relevant training, such as unconscious bias training, safeguarding, mental health and self-defence training, to provide the best quality service when interacting with members of the public and other organisations, whilst also remain safe in the workplace.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Thames21 aims to engage in a proactive approach to ensure projects successfully meet the needs of the local community, whilst monitoring through feedback and input from any events, and regular communication with catchment partners.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

75,000

Please explain how you have determined the number of beneficiaries.

Healthy rivers are essential for thriving communities in South Oxfordshire. As such, the number of beneficiaries has been calculated as the sum of the populations in the wards highlighted in Section 6, with an additional 5% to accommodate visitors to the region.

Please describe who will directly benefit from your services/activities.

Local communities across South Oxfordshire, and those who visit the region, will directly benefit from work increasing access to healthy and climate resilient blue-green spaces, either from the impact of the project or via other active opportunities for involvement, such as routes into citizen science, supporting a local sense of pride and ownership in the rivers across South Oxfordshire.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Encouraging local communities to spend time and be active in healthy natural spaces encourages benefits for physical and mental health and all-round well-being, helping to lessen support from the council in terms of health and social care.

Additional fundraising from external sources for active projects and those in the pipeline will draw further funding into the South Oxfordshire area, lessening the need for financial support from South Oxfordshire District Council.

Partnership working and collaboration through the project development stages, leads to a more strategic and holistic approach to river management in South Oxfordshire, allowing opportunities to knowledge share, maximum use of partnership networks and data/evidence, allowing projects to be cost-effective and reducing any potential doubling of efforts.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Action on climate change and nature recovery

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Projects developed through the additional time and resources, will increase engagement with local blue-green spaces and awareness of the issues impacting local river health and aquatic wildlife. Through project volunteering and citizen science opportunities, residents will gain valuable skills and knowledge, whilst being encouraged to spend time in nature, with associated benefits for health and wellbeing. Overall project outcomes will be centred around creating healthy, climate resilient environments for residents to benefit from and thrive in.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Collaboration with members of the South Chilterns Catchment Partnership will continue to guide the design and deliver of partnership projects in South Oxfordshire, to ensure they are sustainable, cost-efficient and well considered for the range of users. This includes local community groups, who often identify projects and seek professional advice and support through to delivery.

Close collaboration with South Oxfordshire District Council and other town/parish councils will also add considerable value to many projects. Similarly, where appropriate, Thames21 will work with campaign groups, such as River Action UK, to increase impact of the work.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Thames21 plans to increase collaboration further in the Mid/Upper Thames region through working in partnership with and contributing our expertise and resources to a range of projects. To facilitate an expanding team, plans are being made to procure office space in a central location, this team will continue to be supported by the organisation's core and will be budgeted onto project delivery.

As a local Rivers Trust, Thames21 have connections to streams of private finance through the umbrella organisation, alongside this and the Thames21 internal fundraising team, the charity's work can benefit from a diverse and resilience range of income.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Thames21 have set ambitious aims towards decarbonising the organisation and associated operations. Within the organisation's Five-Year Plan, there is a specific target relating to reducing carbon and water footprints by 30% by 2028. As part of this work, Thames21 commissioned an environmental audit in 2024 to inform the organisation of what is currently being done well, such as Euro 6 compliant vehicles and access to ethical pension pots, while setting out additional opportunities areas to further contribute to these targets, such as outlining an action plan of measures required to reach net zero at operational offices. There is an internal working group focused on driving forward the audit's suggestions and ensuring the organisation strives to improve its environmental performance.

Carbon sequestration is also a benefit of work delivered across the organisation, where projects, including large scale-restoration, floating reedbeds and planting, have contributed towards creating areas with greater abilities to sequester carbon and act as carbon sinks in the natural environment.

Supporting nature recovery is at the heart of the organisational aims and objectives, with projects actively delivering this on the ground, such as the Enfield Chase Landscape Recovery Scheme, working with farm clusters to promote nature friendly farming techniques, and large-scale wetland creations, including Rewilding the Rom, Glassmill Pond and Grovelands Lake. Thames21 has a long-term commitment to implementing nature-based solutions and restoring rivers.

<p>The Chiltern Centre</p>	<p>Ref: SRev25-27/37</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. As a charity we recognise the volatility of fundraising. Each year a plan is made to reach breakeven with a recognition that some years there will be a surplus and some a deficit. Prudent financial management ensures these are minimal and offset each other in different years. In a deficit year reserves are used to bridge the gap.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. For an organisation to succeed, it needs to be efficient, effective and economic. Individuals need to be resilient, be able to identify challenges and respond dynamically. All team members should be empowered, supported where necessary and commended for achievements. The organisation should strive for excellence in all areas, especially service delivery. Therefore, to be efficient, effective and economic, The Chiltern Centre works on a goal congruence basis. The team identify and take remedial action where necessary, whether directly within service delivery, or behind the scenes within the management and financial function.</p> <p>So to secure financial stability on an ongoing basis, The Chiltern Centre understands and practices the following:</p> <ul style="list-style-type: none"> • Sets realistic budgets • Has a clear designation of responsibilities • Adheres to procedures and policies • Promotes a hands on approach to understand the needs of the organisation • Understands the nature and sensitivity of cash inflows and outflows • Understands the need to identify and mitigate risk; both present and future; in all parts of operations • Reports on cashflows in a timely and accurate manner and • Demonstrates Transparency. 	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. The impact of COVID19 was significant for The Chiltern Centre. We had little choice but to close for 4 months during 2020 from mid-March through to mid-July, following government guidelines and for a further 4 weeks later in the year, straddling November / December. The re-opening of the Centre in July 2020 was a gradual process, with Covid mitigation measures in place and arrangements for People We Support (PWS) and staff to be in bubbles. This resulted in higher than previous staff: PWS ratios – increasing staff overhead cost, as well as PPE cost.</p> <p>Additionally the revenue from donations in 2020 was also badly hit by the effects of the Covid pandemic, with fundraising restricted to online activities.</p> <p>However, we were fortunate to be able to reclaim a large part of our care staff costs and part of our admin staff costs under the furlough scheme and there were savings on some overheads such as building maintenance, travel and outings.</p> <p>Therefore at this time, the income directly attributable to Covid grants – furlough and other; along with careful overhead cost control, was sufficient to buffer the loss of other revenue streams.</p> <p>Following the pandemic, demand for our services has continued to grow exponentially, we currently have a waiting list of 20 plus families.</p> <p>The Centre prides itself on having a strong management team in place, to undertake sound financial decisions, not only for day to day operations, but for the benefit of the mid and longer term picture.</p>	

Ultimately the Centre is here to enhance the lives of the PWS, as well as supporting the families / carers with much needed short term breaks. But financial viability forwards is key and we are confident that we are sound in this regard, with the skills set, knowledge and ability to weather any further challenges.

We are most fortunate to have a dedicated and highly committed board of Trustees and together with the management team, we are intent on ensuring the long term survival and success of The Chiltern Centre.

In 2023 we celebrated our 20 Year Anniversary!

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

Cross referencing South Oxfordshire population (Office for National Statistics) of 143,782 with the prevalence of adults with learning disabilities of 3.46% and 16/30 year olds accounting for 18.53% of the population (Statista data) suggests a population of young adults with learning disabilities of 920 within South Oxfordshire.

Demand is increasing because of:

- improved diagnosis, reduced stigma in reporting disability, and better survival rates for pre-term infants
- the significant increase of children and young people with Autistic Spectrum Disorder – the Chiltern Centre is able to cater for the high degree of structure that these children need, including those who require behavioural support.

As young people with disabilities reach adulthood they transition from child to adult services – a challenging time with changes in education and access to social opportunities, new systems to navigate and new social work teams to work with.

At the same time, these young people face the same challenges with hormones and relationships that their peers without disabilities face with the same desire for greater independence. This naturally adds new complexity to their social and emotional development and new challenges for their families. Physically, our young people are likely bigger and physically stronger than they once were, and so simultaneously the physical demands of caring for them are increased. For the families, and particularly the parents of a young person with a disability it is vital to have the opportunity to take a break from these demands. Study after study has shown the links between higher levels of anxiety and depression for parents of children with disabilities, as well as higher rate of family breakdown. Lack of free time and dealing with societal attitudes towards disabilities are consistently found to be key factors for this.

The Chiltern Centre is here to help to alleviate some of these problems for both young people and their families. We do this by:

- Providing highly personalised short break respite care which empowers young people to get the most out of life.
- Offering practical and emotional support and vitally, a break from caring and a chance to refocus and rest, to their parents and families.
- Providing an open and inclusive space where the young person and their family feel welcomed, part of a community and cared for without any sense of stigma or negative attitude.

Importantly, because our services start at 16 we are able to provide support through that difficult transitional stage from child to adult social services help our young people and their families, to navigate the changing waters they face.

The need is addressed through assessing Papworth Trust and Mencap statistics around the sector along with The work of The Chiltern Centre is planned and developed taking into account the views of young people using the services and their families. Consultation allows us to ascertain demand and forecast future support requirements. We encourage on-going open dialogue with parents through an annual quality assurance

questionnaire and invite parents to regular reviews and coffee mornings.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

The Chiltern Centre works in close partnership with all agencies responsible for health and wellbeing including social service, education providers (e.g. Henley College and ASDAN) and healthcare in both the statutory and voluntary sectors. Services are planned and delivered in liaison and discussion with them.

The work of The Chiltern Centre is planned and developed taking into account the views of young people using the services and their families. Consultation allows us to ascertain demand and forecast future support requirements. We encourage on-going open dialogue with parents through an annual quality assurance questionnaire and invite parents to regular reviews and coffee mornings.

Young people's feedback is actively sought. As all the young people have communication difficulties this is often based on reactions to activities, visits using photographs as well as observations by staff of behavior and development.

Future development of the Chiltern Centre was featured at an exhibition at Henley Town Council for consultation around updating the local plan.

A wide range of key stakeholders are invited to the Annual General Meeting and Friends and major supporters of the centre are invited to events to share thinking about future strategy and direction.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Our robust referral and assessment process enables us to develop a person-centred support plan that covers all areas of need. This includes a one-page profile that lists likes and beliefs and can be used as a quick reference for staff. This enables staff to have a sound understanding of individual needs such as their disability or faith.

We support people with physical disabilities and we are able to support them to access OXSRAD: The Integrated Sports & Leisure Centre for Movement to Music and Boccia sessions.

We facilitated a holiday to The Calvert Trust in Exmoor which offers a wide range of accessible activities for people with disabilities.

We have also supported individuals with physiotherapy appointments and to attend wheelchair clinic appointments.

We recently worked in conjunction with the Kenton Theatre to put on an immersive production of Bahdoon. Through the support of a Music Therapist and Drama Therapist, the people we support rehearsed the production over a few months and in June proudly performed this to families and members of the public at the Kenton Theatre. For some of the people we support this was the first time that they had been involved in a performance or been on stage and provided them the opportunity to work together as a team in the production and increase their confidence in social settings.

We have supported a person to observe the holy month of Ramadan in his own specific way. Due to their needs, they are unable to fast completely, however we support and encourage the person to reduce his intake of sugary drinks and puddings. This enables the person to follow his faith alongside his family and have a sense of belonging.

Each person we support has a support plan with a communication section which details specific needs around communication such as the person using signs and gestures and how to support the person to make choices.

A member of our team has been trained by Easy Read UK to create easy read documents. This has enabled the service to produce documents and notices for the people we support i.e. surveys, consent forms, fire notices, how to complain and information around keeping safe and safeguarding.

Staff continue to have training in Intensive Interaction, and we continue to work closely with the Intensive Interaction Coordinator at Oxford Health. They have observed staff with Intensive Interaction sessions.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

The Chiltern Centre continue to provide opportunities and new experiences to young adults with disabilities by providing tailored person-centred support through day support and short breaks.

Our robust referral and assessment process continues to enable us to develop a person-centred support plan that covers all areas of need. This includes a one-page profile that lists likes and beliefs and can be used as a quick reference for staff.

This continues to allow us to facilitate individual and group activities. In the past year we have continued to support people to be involved with work experience with Vana Farm, an organic farm based in Aylesbury. Through the farm the people we support have been able to learn valuable life skills, gain a work ethic, purpose, a sense of belonging and feelings of accomplishment. We have also worked in partnership with a local organisation, Inclusion Un-Limited Activities, to provide sensory activities which has resulted in the people we support producing amazing artwork. We have also continued to enable the people we support to access Exercise to Music and Boccia at Oxsrade, a local hydrotherapy pool, Music Therapy through Chiltern Music Therapy and Tag Rugby with The Wolves, part of Wallingford RFC, which has given the people we support opportunities to grow in confidence, develop social skills, get fit and make friends.

We continue to be an integral part of the Henley Regatta for the Disabled, and we were able to support the organiser in promoting the regatta to other local providers, which resulted in 4 teams of people with disabilities entering the Regatta, rather than just our team. This made the Regatta more inclusive than it has ever been and was well supported by the local community. The Chiltern Centre team won the event, which also gave the people we support much pride in all their efforts.

A first for the people we support, was to work in conjunction with the Kenton Theatre to put on an immersive production of Bahdoon. Through the support of a Music Therapist and Drama Therapist, the people we support rehearsed the production over a few months and in June proudly performed this to families and members of the public at the Kenton Theatre. For some of the people we support this was the first time that they had been involved in a performance or been on stage and provided them the opportunity to work together as a team in the production and increase their confidence in social settings.

We have facilitated weekend breaks at Butlins for our Buddies Social Group. We were also able to support three people with profound disabilities on a weekend break to The Calvert Trust in Exmoor, which offers a wide range of accessible activities for people with disabilities. During the weekend the people we support were able to experience new activities such as abseiling, zip wiring and archery and the weekend was full of smiles and laughter.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

7

Please explain how you have determined the number of beneficiaries.

A review has been undertaken of the beneficiaries of the Chiltern Centre work and 7 young people currently reside within South Oxfordshire. Whilst we would like to increase this number and have a wait list we are currently capacity constrained. The longer term plan and is included in the latest local plan is for the centre to have a purpose built facility on the Highland Park development which would increase capacity significantly with a move from 4 to 8 bedrooms.

Please describe who will directly benefit from your services/activities.

All of the young people supported by the Chiltern Centre are within the vulnerable group of disabled people. These young people have learning disabilities with associated communication and behavioural difficulties. Many have additional complex medical needs including: sensory impairments, mobility issues, epilepsy, complex feeding needs, continence and long-term health issues such as cerebral palsy.

The Challenges

As young people with disabilities reach adulthood they transition from child to adult services – a challenging time with changes in education and access to social opportunities, new systems to navigate and new social work teams to work with. In our local area the only alternative care provider for these young adults is up to 60 miles away and in settings that focus on care for adults of all ages (more often than not dominated by much older people with whom they have little in common), within a hospice setting (which

focuses on end of life care) or within a hospital (which does not provides medical rather than social or emotional care).

At the same time, these young people face the same challenges with hormones and relationships that their peers without disabilities face as well as the same desire for greater independence. This naturally adds new complexity to their social and emotional development and new challenges for their families. Physically, our young people are likely bigger and physically stronger than they once were, and so simultaneously the physical demands of caring for them are increased. For the families, and particularly the parents of a young person with a disability it is vital to have the opportunity to take a break from these demands. Study after study has shown the links between higher levels of anxiety and depression for parents of children with disabilities, as well as higher rate of family breakdown. Lack of free time and dealing with societal attitudes towards disabilities are consistently found to be key factors for this.

Demand is Increasing

The demand for our services is increasing as a result of:

- improved diagnosis, reduced stigma in reporting disability, and better survival rates for pre-term infants
- the significant increase of children and young people with Autistic Spectrum Disorder – the Chiltern Centre is able to cater for the high degree of structure that these children need, including those who require behavioural support.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The Chiltern Centre is here to help to alleviate some of these challenges faced both young people and their families. We do this by:

- Providing highly personalised short break respite care which empowers young people to get the most out of life.
- Offering practical and emotional support and vitally, a break from caring and a chance to refocus and rest, to their parents and families.
- Providing an open and inclusive space where the young person and their family feel welcomed, part of a community and cared for without any sense of stigma or negative attitude.

Importantly, because our services start at 16 we are able to provide support through that difficult transitional stage from child to adult social services help our young people and their families, to navigate the changing waters they face.

The services we provide are often in conjunction with Local Authority services, i.e home care.

The service we provide enables their parents, who are their main carers, to have a break and recharge and prevents family breakdown and the need for the Local Authority to provide long term care and support. This is supported by research undertaken by Mencap.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Inclusion, accessibility and accountability

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

The Chiltern Centre continue to provide opportunities and new experiences to young adults with disabilities by providing tailored person-centred support through day support and short breaks. Our robust referral and assessment process continues to enable us to develop a person-centred support plan that covers all areas of need with impact assessment at it's heart.

We give young people with disabilities the opportunities to:

- Build confidence and the ability to make informed choices by supporting them to develop independence.

- Build life skills including such things as meal planning, shopping, cooking, laundry and using public transport.
- Socialise, build friendships and enjoy themselves with a broad range of leisure activities including art and crafts, sporting and leisure activities.
- Make informed choices, do things for themselves, try new activities and experience different environments.
- Improve their communication skills enabling them to express their needs and desires, reducing frustration and anxiety.
- Encourage an active lifestyle.
- Feel and be supported practically and emotionally as they meet the significant challenges of transitioning to adulthood.
- Have a say in the service, the way they access it and the activities they get involved in.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

The Chiltern Centre works in partnership with a number of other charities to provide specialist services:

- South Oxfordshire Mencap (joint events with young adults attending Mencap events & receiving short break care at The Chiltern Centre, shared fundraising activities)
- Kenton theatre facilitate a production annually by the Chiltern Centre Youth Group
- Henley Youth Centre (specialist youth group is funded on their behalf)
- Fare Share - The Chiltern Centre linked with Fare Share after an SODC networking event, which helps improve food waste within the area
- Oxfordshire Association of Care Providers (OACP)
- OXSRAD - The Integrated Sports & Leisure Centre - provide adapted gym sessions for young people with disabilities
- Chiltern Music Therapy - provide individual and group sessions for young people using the Chiltern Centre
- Inclusion Unlimited work with young people to express themselves creatively.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Developing services in collaboration with – building on existing relationships, partnerships / affiliations:

- heightens public awareness and generates goodwill – some businesses chose to charge us discounted rates such as for building-roof survey / windscreen repair.
- raises support in form of volunteers, such as helping in the garden – which saves costs and
- increases local support from community generally and hence increases level of donations, strengthening financial security.

We also look to establish partnerships with corporations for sponsorship of events or programs, offering them visibility and community engagement in return.

We will continue to organise community fundraising events that foster community involvement and generate revenue.

We are investigating a membership model that will generate a steady income stream.

We are actively recruiting and training volunteers to support fundraising efforts, reducing operational costs while fostering community engagement.

Over the past couple of years we have been the recipients of legacies – we are planning an initiative to encourage legacy gifts and planned donations, providing a long-term funding source for the Chiltern Centre.

We are looking to diversify revenue streams thereby improving financial sustainability, whilst fulfilling our charitable purposes.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

The Chiltern Centre was a building repurposed over 20 years ago. As such there is significant wear and tear and we recognise it is not optimal in terms of today's climate change considerations. Longer term plans are to move to a purpose built facility which will as part of design and development undergo a climate audit.

In terms of the current centre improvements have been made to be more environmentally friendly e.g. single glazed windows have been replaced with double glazed, the boiler has been replaced for a more efficient one and insulation has been improved.

Oxfordshire Discovery College	Ref: SRev25-27/25
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. We have recently worked with a Fundraising Mentor to develop an income generation plan for the coming period, and are confident in our ability to execute this successfully. We currently have a good grounding a a diverse spread of income streams including trusts and foundations, individual donors, corporates and community fundraising. Our aim is to grow each of these segments to bring in more sizeable contributions, and to add some trading (training and consultancy packages) to diversify further.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. We have designed a package of training and consultancy on the topic of co-production, which many organisations want to be able to incorporate into their culture and processes. We already have interest in this offer from key local organisations including infrastructure body Oxfordshire Youth. We also want to appoint our first part-time fundraiser to further bolster our fundraising capacity - this is currently carried out exclusively by a volunteer but we aim to secure funds for a paid day/week for fundraising, and also to add someone with a fundraising specialism to our board of trustees. This shows our commitment to both growth and stability over the coming years.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. There have been two factors that have impacted our finances: Firstly, cost of living has impacted both our beneficiaries and our internal staff. Increasingly, we're needing to incorporate extra support measures such as providing meals at programme deliveries and covering transport costs. Additionally, our staff have struggled to manage the escalating costs of day to day life so we've also felt it necessary to review our remuneration package for staff and offered a small increase. Secondly, our CEO who is our key fundraiser took 6 months of maternity leave. We'd prepared carefully for this period by increasing income generation in the months preceding it, but it inevitably affected the pace of our funding pipeline on her return in the Spring of 2024.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. We use local insight data to identify geographical areas with high levels of mental health need, and we consult regularly with our beneficiary group to ensure our service is relevant and appropriate (more on this below).</p>	
<p>Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery. Before establishing Discovery College; we gathered local people to discuss the possibility and gauge support. This group then appointed two young (<25) researchers with lived experience and local connections to conduct a needs analysis which found in support of creating a Discovery College. We established a Working Group of diverse volunteers who represented our stakeholders - lived experience of childhood mental illness; lived experience of caring for children with mental illness; and professional expertise. The group; aged 22-63; shaped the entire organisation from the ground up. We piloted for 2 years to enable young people to shape our model. We worked with young interns to create resources and develop our enrolment process. Our Board of Trustees has a rich blend of experience. We're strongly committed to co-production at every level; and this is baked-in to our way of working. More recently; we've consulted with</p>	

young people and their families to agree how we can improve their registration experience; and what support they'd like to have.

On an ongoing basis, we collect formal and informal feedback from participants, families, partners and schools to continuously improve the quality of our services. Beneficiaries are involved in a piloting process for any new programmes or resources we design and are able to meaningfully input and shape the end product. We believe in a spectrum of participation throughout the service; recognising that everyone wants to be involved to different extents and different ways; and we all benefit when we can accommodate this and celebrate it!

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

When we wrote our policy in 2022 we included an action plan for that year (see policy) - all of the actions on that action plan were successfully implemented.

We use a Quality Assurance Tool to review all newly developed programmes before they're brought to delivery, and this includes a range of EDI checks such as representation in content and resources, appropriateness of language, and inclusivity of real-life examples.

We actively recruit for diversity to ensure that a range of people are represented in our staff team, and we are transparent about salaries and support available.

We actively recruit people with lived experience of mental health problems and have measures in place to support them to succeed in the workplace.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We monitor participant satisfaction and impact at regular intervals and have robust processes in place to do this. We use a rigorous, unobtrusive approach across all of our programmes, collecting quantitative and qualitative data. Our quantitative data collection utilises age appropriate evidence-based tools from the Public Health England approved list (Mental Wellbeing Toolkit). This measures any changes in participants' wellbeing and other socio-personal factors such as self-esteem and social connection. We benchmark before and after the programme, and take interim data at each session using the Zones of Regulation to inform delivery each week. We sometimes also collect additional subject-specific data, such as resilience or coping measures.

Alongside quantitative data, we also collect qualitative data as a channel for participants to voice directly to you and to us their reflections on their experience, using Storytelling Methodology to ensure that their stories are told accurately and that the act of doing so is an empowering part of the programme. We pair this with standardised questions for participants, parents where appropriate, and partners/teachers to collect feedback on their experience with us to enable continuous programme improvement. After every programme the CEO or Coordinator meets with the facilitators to review data collected alongside facilitator reflections and observations and to write a summary impact report.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

100

Please explain how you have determined the number of beneficiaries.

We currently have 100 beneficiaries enrolled from Didcot alone. Whilst not all of these beneficiaries will participate in a programme during this period, we also have registered beneficiaries from the wider South Oxfordshire area. Many of these are waiting for a programme to be made available in their area, or for our much-anticipated online art and wellbeing programme to become available.

Please describe who will directly benefit from your services/activities.

We work with children and young people who have low wellbeing or a mental illness. A staggering one in five 8-16 year olds have a probable mental health problem - that's six in every school classroom. In just three years, the number of children referred for emergency mental health care in the UK has increased by more than 50%, and we now have nearly 500,000 children taking prescriptions for antidepressants. Oxfordshire is thought of as an affluent county, but amongst the dreaming spires there are areas of deprivation, and high levels of need. Locally, the number of mental health referrals for children and

young people has continued to increase significantly, with referrals for our youngest children (aged 0-4) rising by 23% in just two years.

We work with an incredibly broad age range (from 4-25), and we also work with parents, carers and professionals; recognising that change can only be made by involving the networks of support that surround each young person. Many young people we work with have experiences that are further challenged by other needs or barriers such as poor physical health, vulnerable home circumstances, unstable housing and low income backgrounds. Furthermore, as a direct result of their mental health problems, many have become unable to access work or education.

We deliver powerful evidence-based psychoeducation programmes, working with groups over a series of sessions to instil a sense of hope, agency, and practical tools for wellbeing. We tailor programmes to the needs of the group, including meals, time spent outdoors, or being based at educational establishments where relevant.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

In South Oxfordshire we have very high rates of CAMHS referrals, SEN, and many families in need of support with complex circumstances.

Our interventions with young people and families to support improvements to their mental health relieve pressure on the wider ecosystem of health and family services. We work to make families more resilient, better able to support one another, identify problems arising, and equipped to find constructive and sensitive ways to navigate times of challenge together. This means a reduction in the need for clinical intervention, less pressure on GPs and CAMHS, and a greater ability for families to overcome challenges in their broader circumstances - if they're not investing all of their time and energy in solving their child's mental health problems they have more capacity and resource to tackle their housing, their finances. They're also more informed and better able to access more proactive leisure and community services due to our own signposting - driving families towards positive initiatives that again reduce reliance on costly crisis interventions.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Inclusion, accessibility and accountability

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Our work generates outcomes on 3 levels:

Firstly, by directly positively impacting the mental health and wellbeing of children and young people who participate in our programmes. The tangible outcome here is improvements in Public Health England approved wellbeing metrics for participants, indicating improvements in their overall wellbeing.

Secondly, by creating opportunities for beneficiaries to genuinely shape our service - from taking part in focus groups and survey to identify areas of need and explore proposed programme content, to creating learning resources for other young people to be hosted on our website. Young people and their families are an active part of developing and steering our work. This not only enhances our offer and improves quality, but also provides opportunities for volunteering, learning and development that boost confidence and raise aspirations. The tangible outcome here includes stakeholders continuing to be represented in our Board of Trustees, and the development of our planned Co-Production Forum, a space where staff, trustees, volunteers, and beneficiaries can come together to be the champions and guardians of co-production in the organisation. This will inevitably lead to increased confidence of those involved.

Thirdly, we proactively seek ways to influence sector change and advocate for greater user involvement across services. We aim to role model co-production in action, but also to be transparent and generous with our learning on this topic, sharing resources and good practice as widely as possible to encourage other organisations to adopt a more co-productive approach. The tangible outcome here is uptake of our training and consultancy offer in external organisations, leading to improved accessibility and quality of service.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Our values are:

How we treat people - we trust people. We share what we have with our community and we collaborate

unconditionally.

How we make people feel - we aim to make people feel important, empowered, and excited about their future.

How we set direction - we are ambitious, inventive, and conscience-led and always open to change.

We have recently collaborated with Artscape, part of the Oxford Health Arts Partnership, to design a brand new Art and Wellbeing programme. We joined forces with local artist, XXXX, to generate a series of activities and video tutorials that young people can subscribe to and access through our website, completing the programme remotely at their own pace. We firmly believe that, whilst we have significant expertise of our own, we can add richness to our programmes by collaborating with others who have different specialisms.

We have also previously worked with the Oxford Academic Health Science Network (AHSN) who carried out a small independent evaluation of our fledgling service - we are committed to robust and unbiased reflective processes to ensure that we are providing the best quality service possible. We are also currently working closely with The Branch in Chipping Norton, committing to basing two of our staff at their premises one day per week to embed our partnership and improve accessibility of our services to the people of Chipping Norton.

Our board of trustees has a rich blend of experience: they represent our stakeholders - lived experience of childhood mental illness; lived experience of caring for children with mental illness; and professional expertise. The group, aged 22-63, have shaped the entire organisation from the ground up and continue to combine their knowledge and skills to provide strategy, scrutiny and support. In addition, our staff are also comprised of people with both lived and learned experience, ensuring that the voices of our beneficiaries are inputting into our programme design and delivery.

Lastly, we are in early stage discussions with a sector infrastructure body to provide a package of training and consultancy on the topic of co-production to ensure that meaningful participation opportunities are genuinely embedded within the organisation and are fully supported and properly resourced.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

We are fierce defenders of our services remaining free at the point of access so that any young person, regardless of circumstance, can get the help that they need. We also don't set inflexible limits on how long a young person can engage with us - they can access one programme, or they can return to us whenever they need us over a series of years.

However, whilst we do not and will not charge participants to attend, we are exploring a structure of fees from partner organisations, such as the universities.

We are also developing a package of training and consultancy, as mentioned previously, which would be both a way of generating income but would also further our aim of advocating for the co-production approach.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

We rent a space in one of the Makespace buildings, co-habiting with artists and other small organisations, as well as South Oxfordshire Housing Association. This makes efficient use of space and utilities.

Two of our staff team have made the decision not to own cars, and our team therefore regularly lift-share or take public transport.

We incorporate relevant opportunities for participants to connect with and appreciate the natural world as part of their programmes - not only is this good for their wellbeing but also increases their awareness and empathy for the natural environment and wildlife.

Riverside Counselling Service (RCS)

Ref: SRev25-27/30

Financial Review

Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.

Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.

We have worked hard to diversify our income streams and to develop our strategic approach to fundraising. RCS has a fundraising sub-committee who are responsible for target setting for fundraising as well as identifying potential sources of income. We currently generate income from our service provision, community fundraising events and campaigns and Trusts and Foundations fundraising.

We recruited a new Fundraising Manager in November 2023 and our new Chief Executive, who joins us in November 2024, has an exemplary record in fundraising. The latter appointment is our first permanent Chief Executive. The role is being introduced in recognition that to shore up the future of RCS and our financial robustness we need leadership and vision as well as clinical excellence. The introduction of this role will add additional fundraising capacity and experience to our team as well as allowing us to plan for further and future income generation. These plans include discussion around developing RCS as a training resource in the local community. Our 1:1 work with young people is highly specialist and we are developing a programme of work that will allow us to offer accredited training to those wanting to develop their skills in working with young people.

We currently generate 40% of our costs from fee income, 3.8% from community fundraising and 38% from grant applications the rest of our income is made up from bank interest, counselling supervision and individual donations. To name a few, we recently secured grants from:

- The Openwork Partnership - £15,000
- Shanly Foundation - £5,000
- Anthony Lane Foundation - £5,000
- Didcot Powerhouse - £5,000
- Invesco Foundation - £3,000
- Syder Foundation - £2,500
- Pye Charitable Trust - £2,500
- Didcot Council - £4,125
- Oxford County Council - £1,375.

We currently have applications pending with:

- Garfield Weston - £15,000 (for two years)
- Oxford Community Foundation - £8,925
- Ashworth Trust - £5,000
- Comic Relief - £5,000
- Childwick Trust - £5,000
- Peter Harrison Foundation - £2,500

Our Fundraising Manager is responsible for identifying for new opportunities for applications where we meet the eligibility criteria. We have a calendar of community fundraising events that we deliver each year which has been enhanced by the money generated from our 'Be a friend, Tell a Friend' Campaign. Generating core costs is always a challenge but we have a good track record and are confident that with strategic planning and financial forecasting as well as the further development of our fundraising strategy we will be able to meet any shortfall in our funds.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

As mentioned above, we are looking into developing RCS as a training provider. This could include offering an Introduction to Counselling course as well as plans to extend our successful Young People's Stage 1 training and offering the Stage 2 training which we believe will attract qualified adult trained counsellors who want to work with young people but need a qualification to do this. This will have the dual advantage of generating income but also increase our capacity to work with young people as those undertaking the training are required to volunteer a minimum of 50 clinical sessions. We will also explore what we could offer in the local community that could be run by our trainee counsellors such as wellbeing events and sessions.

This would also help to raise our profile and assist with the CPD requirements for our trainees.

The most significant change in relation to our financial stability is the additional resource of the Fundraising Manager and our Chief Executive. RCS has previously had a Clinical Director in the lead role with the emphasis having been on our clinical excellence as opposed to the business planning needed for sustainability. The Chief Executive will allow us to plan for our future and commit to ensuring our sustainability as an important resource for the wellbeing of the local community in South Oxfordshire.

From January 2025, RCS will start to develop its three-year strategic plan which will set out the vision and mission for our work as well as our approach to ensuring our future at a volatile time economically and within the voluntary and community sector. Our planning will also include the development of a three-year financial forecast that will allow us to make important projections about our income and expenditure. This will provide the foresight needed to plan for scenarios that could include periods of uncertainty and/or financial challenge. RCS has been operating as a valued and valuable mental health resource within the local community since 1989 and having come through a difficult time we are feeling more resilient and better placed to meet further challenges whilst building for the future.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

RCS has experienced a challenging period financially. There have been a number of reasons for this. We made a commitment, which was supported by a previous SODC grant, to extend our service provision into some of the more deprived communities locally. We now offer counselling services in Didcot and Berinsfield which are traditionally lower socio-economic communities. This, alongside the cost of living crisis, has brought a noticeable reduction in relation to our income generation from client fees. The financial year 2023-24 saw our average fee income across our service reduce from £22.49 per session to £19.14 per session.

This reduction in fee income is even more pronounced in Didcot and Berinsfield. In the 6 months to September 2024 the average fee in Berinsfield was £8.98 per session and in Didcot was £16.48. We have to hire all the rooms we use for our counselling provision. We have estimated that each counselling session costs around £45 to deliver. The shortfall between fee income and the cost of providing our service has to be recouped from our fundraising efforts.

The pie chart attached (below) shows the percentage breakdown of current fee levels. It highlights that across our service provision, 63% of clients are paying £20 or under for their counselling. This is due to their household income being £25k or less per year. The impact of this is a significant increase in the funding that needs to be found for core costs to ensure the sustainability of our service provision.

This drop in fee income coincided with a period whereby we were without a dedicated fundraiser. This led to a drop in our fundraising activity which resulted in a drain on our reserves. Our reserves policy is to hold 3 months in reserves and we fell significantly below this. As a result of this, we had to take some difficult decisions including postponing volunteer counsellor recruitment and temporarily curtailing our longer-term therapy activities. This was a particularly difficult period for us. We responded to this pro-actively by launching a large scale and highly successful fundraising campaign which brought our reserves back in line with our reserves policy.

We are also being impacted by the volatility in the applications for Trusts and Foundations fundraising with a 1 in 20 success rate currently. Many grant providers are being overwhelmed with applications and/or are pausing their applications process to take stock and review. This makes local grants, such as that offered by SODC, vital contributions to the sustainability of local service providers. Periods of economic uncertainty for people both personally and professionally always places a strain on the voluntary and community sector in terms of the increasing levels of need that we start to see as well as the decline in funds to support us to respond.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

The South Oxfordshire JSNA that was published in August 2024 highlights that there have been 'above average and increasing' numbers of young people accessing and needing support with their social, emotional and mental health needs. The report also highlights increasing levels of school absenteeism. The

Office for National Statistics undertook a significant piece of research into young people's mental health which highlighted that in South Oxfordshire 35 700 young people have a probable mental disorder with just over 20% being in the age bracket that our services support. There are a growing number of reports highlighting the very real impact that social media is having on the mental wellbeing of the younger generation. The social psychologist, Jonathan Haidt is gaining a lot of traction with his book: *The Anxious Generation: How the Great Rewiring of Childhood Is Causing an Epidemic of Mental Illness*. Haidt highlights the negative impact of mobile phones on young people's neurological development. There is a very real need amongst the younger generation which we are working hard to meet.

Similarly, South Oxfordshire's JSNA highlights growing levels of depression amongst the adult population locally. As of 2022/23 there was a total of 86,662 people with GP-recorded depression in Oxfordshire (county). This was an increase of 5,485 (+7%) compared with the previous year. These numbers only focus on GP records and it is likely that there is a much higher number of adults who would benefit from support. Whilst the stigmatisation around mental illness is being reduced, there will be many adults who don't present at their GP's with issues relating to their mental health but who will access a confidential service, such as ours, for support.

We are aware from client feedback and from our partner networks that waiting times for face to face talking therapies through the NHS in Oxfordshire can vary as can the level of support being offered. NHS wellbeing services throughout Oxfordshire are run through MIND. This partnership helps to mitigate long waiting lists; however MIND workers are non-clinical. We see our service provision as having huge complementarity with theirs but very much needing to exist alongside so that the local population do have access to affordable and accessible clinical support from a well-established and BACP accredited provider.

MIND signpost to us and other local counselling services. Talking Therapies provided by the NHS is Cognitive Behaviour Therapy which is focused on how an individual can manage their symptoms. The clients we see need a more explorative approach that is tailored to meet individual need. RCS's ability to adapt what we offer based on individual clinical need means that we can be responsive to each client's presentation and offer professional counselling support over a longer period. Our service provides a valuable resource in the SODC area, offering accessible, affordable and professional counselling with little or no wait, at a minimal cost to those who are most in need.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

We have a proven track record of working closely with partner agencies. For the last six years, we have run an adults telephone Drop-In service in conjunction with the Berinsfield Health Centre and for the last year a face-to-face Drop-In service at the Berin Centre. These services evolved from discussions with partner organisations about how best our service could support their service users and how we best we could work collaboratively. The provision of these services enables GP's and staff at the Berin Centre, Social Prescribers the Vicar and the CAP debt counsellors to signpost individuals that they encounter or who they are supporting to our counselling provision. This provides access to emotional support for some of the most vulnerable individuals many of whom would be unlikely, otherwise to access counselling support. Most of those referred to these services have no previous experience with counselling provision. Our Drop-In services offer a responsive and timely intervention when an individual is at their most vulnerable.

Our most recent collaboration with a local partner is with the Berry Youth Centre in Berinsfield. Through discussion with the Berry Youth Centre and in response to an identified need, we agreed to pilot a Young Person's Drop In in the Centre. This has been running since January 2024. To date the take up has been lower than anticipated so we are beginning to explore how we can link with the Pastoral teams in local schools to see whether we can improve the take up of this offer. We will also be talking further with young people about how they feel they could best access support. We're aware that many young people seek support through apps or messaging platforms and a face-to-face service can feel overwhelming initially.

RCS is embedded in the local community, and we have a high profile as a provider. Our Head of Counselling recently contributed to the Health and Wellbeing survey in Berinsfield and we are often approached to provide input into local plans and consultations about service provision.

Our feedback channels for our service users are via our evaluation tools. This includes a clinical questionnaire and a service evaluation survey. The latter asks service users about their satisfaction with the service, how accessible they found us and any changes that they would like to see. We use the feedback from the survey to develop and enhance our service provision. Examples of changes that we have made based on service user feedback includes reviewing counsellor availability and encouraging more counsellors

to offer evening appointments to meet client demand and offering clients online sessions where they have been unable to attend in person. Our service evolves to best meet the needs of the communities in which we operate. This can only be done effectively by listening to those who are our beneficiaries and adapting to meet their needs. Our counsellors, staff and trustees are invited to attend quarterly meetings and complete an annual survey to share their views.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

In the autumn of 2023, we undertook a comprehensive review of our approach to Equality, Diversity and Inclusion. Every 3 months we host a 'community meeting'. Invited to this meeting are our Board, paid members of the team, freelance staff and our volunteer counsellors. We used our December 2023 meeting to initiate a wide-ranging, service wide discussion that was designed to surface and explore viewpoints about our approach to equality, diversity and inclusion with the aim of developing our strategy and embedding our approach into all areas of our practice and service provision.

Equality, diversity and inclusion need to be scrutinised within all areas of our operation and governance. There is always more that we can do and will continue to do, and we also became aware through this session as to how this manifest within the culture of the RCS. We will continue to revisit this work moving forward, it is not a static piece of work. From this meeting we have further developed our policies around this area and have developed an Equality, Diversity and Inclusion strategy that will be reviewed by our management committee on an ongoing basis.

We are now much more robustly monitoring the protected characteristics of our clients. We collate and review this data to identify any gaps in terms of who we are and aren't reaching. We will be comparing this data against the local census population moving forward and will continue to consider how best we can reach some of those communities who we have less contact with.

One major barrier to accessing therapy is affordability and our move to offering therapeutic interventions in more deprived communities was taken as a proactive response to addressing this. Our continued emphasis on ensuring RCS remains an affordable counselling service, accessible to everyone, regardless of their financial situation, is something that our team see as part of our core objectives.

We are mindful of our responsibility in ensuring that our counsellors are kept up to date with issues around equality, diversity and inclusion. With this in mind, we have focussed our CPD programme this term on sessions focused on neurodiversity including working with clients who are on the autistic spectrum or presenting with ADHD. We are also running a session on supporting transgender clients. We bring in specialist speakers with subject expertise to deliver these sessions for us.

Another important aspect of accessibility is that we offer online counselling to those clients who are not able to attend in person counselling. This is enabling clients to access therapy who wouldn't ordinarily be able access it in person and it offers us more flexibility in meeting an individual client's need, for example if they can't attend their face-to-face session, it might be possible to move this online rather than the client miss their session completely.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

We evaluate the impact of our service provision in several different ways. This process starts from the point of assessment with each client. Our assessment process is in depth and tailored to meet individual need. As mentioned previously, we have recently introduced a new triaging system to ensure that those with the highest level of need are prioritised for the service. When a client self refers, we gather information about the client and their individual needs and consult with them about where they would like to be seen. Our clinical leads review the assessment and match clients with a counsellor who they think will work well with them and who has availability in the selected location

We use a recognised tool – the CORE -OM to assess the individual's psychological distress and its impact on their functioning at the start of our work and again at the end of their counselling. This data highlights that between March to August 2024, 95.2% of clients identified an improvement in their wellbeing.

We also invite clients to complete feedback questionnaires at the end of their therapy about our service provision. Recent feedback illustrates the value our clients place on our service and suggests they are appreciative of the flexibility we show to them as highlighted in the quotes below:

'Riverside has been an incredible resource for me to lean on when I really needed it. I am so thankful for the

opportunity to receive high-quality, routine counselling support at an accessible rate. I could not recommend the service highly enough and I have already recommended it to multiple friends who need counselling support. I would not change anything about the service.'

'I thoroughly enjoyed the service and appreciate the counselling experience, thank you so much for providing me this opportunity. Additionally, I really appreciate the discount on the counselling fee, as I would not have been able to afford the original price'.

'I found the session really helped me reframe my unhelpful thinking patterns. It was good to be able to talk freely and not feel judged. It was great to have the flexibility of undertaking some session on zoom as well as face to face'.

We review all the feedback on an ongoing basis and share this with our clinical team and our counsellors. We explore the qualitative and quantitative data generated by the service to help us consider ways to enhance and improve our service provision.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

400

Please explain how you have determined the number of beneficiaries.

We have determined the number of beneficiaries based on our previous year's data. This provides us with a baseline figure from which to estimate what we feel is achievable growth given our current number of counsellors and our clinical support team. Now that we have additional resource, we are in the process of recruiting new counsellors with a view to expanding the number of counselling sessions, the take up at our Drop In's and attendance within our groups. With the recruitment of our new Chief Executive, we are planning to improve our networks and our opportunities for increasing referrals and collaborative working. Our Chief Executive will play a key role in developing these relationships and exploring opportunities for partnership working.

This will include building new links and developing existing ones with the NHS Keystone hubs, GP practices and Social Prescribers across South Oxfordshire. We will also be looking at developing our publicity materials and expanding our reach with local VCS providers and organisations supporting young people. We feel confident that we can reach out to more people who need our support, increase the number of referrals coming into our service and achieve the total number of beneficiaries that we have detailed in our target submission document and as costed in our forecasted budget for 2025/26 and 2026/27.

Our recent 'Be a Friend, Tell a Friend' Fundraising campaign led to a discernible increase in the number of referrals coming in from people who become aware of us via this campaign and as a result, enquired about our service provision. We would like to widen our publicity endeavours, particularly in Didcot and Wallingford, and more widely across other communities in South Oxfordshire with a view to increasing our referrals numbers and the diversity of the communities that we are reaching.

Please describe who will directly benefit from your services/activities.

Our service is open access to all South Oxfordshire residents. We work with a diverse cross section of local people but are aware that there is always more we can do in terms of increasing access. We monitor the demographic profile of our clients including; age, gender, ethnicity, disability and sexuality. We also ask people about household income, where they live and the presenting issues, they are experiencing that brings them into our service. The age range of our clients covers a broad spectrum with the youngest being 12 and the oldest being in their 70's. The highest % of clients are those in the age bracket 25-44 (41%). 72% of our clients are female and 82% are of White British ethnicity, 88% are heterosexual and 14% have a disability.

We currently monitor ethnicity, disability and sexuality through anonymised data that clients can choose to complete which around 30% of them do.

We are reviewing our approach to data gathering in line with our Equality, Diversity and Inclusion strategy so that we can gather more data and have a greater understanding of who our service is and isn't reaching. We intend to do more detailed analysis of the different communities in the areas where we are currently based so that we can better understand where some of the gaps in service provision may be. Based on this, we will look at approaching various community groups/religious institutions to target ethnic minority groups by promoting mental health and well being.

We will be producing regular reports on the demographic profile of our service users moving forward to increase our awareness. We have provided a detailed breakdown of the total number of presenting issues under Section 6 of this application under Community Need.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Our service is complementary to the services provided by social services for young people, families, carers and adults at risk. There is a strong preventative element to the work that we do as supporting people to address their mental health can impact on many different areas of their life including their ability to engage and sustain employment and their sense of connection with their local community. Our work supports the work of public health providers, GPs and the important role of social prescribers. All this input helps to prevent the escalation of need and the presentation to statutory service provision.

Dr XXXX, lead GP at the Berinsfield Health Centre wrote in support of our application regarding our Drop In provision:

‘Riverside helps us to be more responsive to these patients and provide more effective care and also relieves some time pressure from GP’s.’ (Please see Section 6 – written support from other agencies and organisations).

The 2024 JSNA highlights the rates of absenteeism amongst young people which will be directly correlated with their emotional and mental wellbeing. It also notes that young people who are experiencing issues with their mental health are less likely to engage in activities. Similarly for adults there is a strong correlation between feelings of loneliness and disconnectedness and poor mental health. We have seen firsthand the difference that our therapeutic interventions make for people’s lives in terms of helping them to cope with anxiety and/or depression that has previously proved debilitating.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

The achievable outcomes for residents that we are expecting to be able to deliver as a direct result of our services/activities that we are requested funding for are set out in our target submission form 2025/26 and 2026/27.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

As detailed earlier in our application, our most recent service evolutions have emerged because of collaborative projects that we have co-designed with partners. Our adults telephone Drop-In service was developed as a direct result of discussions with the team at Berinsfield Health Centre as to how we could work together to best meet local need. This service has now been running for six years. We took the same approach with the Berin Centre and for the last 12 months we have been offering a face-to-face Drop-In service at the Centre.

These services evolved from the identification of a local need and exploring how best to respond. In providing these services we have networked with other local providers to ensure that they are aware of the service and know how to signpost the people that they are supporting to our services. This has raised our profile locally and developed our relationship with social prescribers, local GPs and local debt teams amongst others.

Our most recent collaboration is with the Berry Youth Centre in Berinsfield. Through discussion with the team at the Berry Youth Centre it was felt that there could be benefit in offering mental health support on site at the Youth Centre in a way that would be easily accessible to the young people who attend the Centre. We jointly agreed to pilot a Young Person’s Drop-In at the Centre which has been running since January 2024. The next stage of this project will be to work with the young people and the team at the Centre to review the impact of the project and to adapt it, where needed to better meet local need.

As a local charity partnership working and collaboration is fundamental to our work. We are a local resource and therefore, we need to understand and respond to local need. This is most effectively achieved where

local providers come together to provide a joined-up response and pool resources, skills and ideas and we will continue with our existing partnerships and research new collaborations.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

As mentioned, financial sustainability is front and centre of our strategic thinking and planning for RCS as an organisation. The economic climate is challenging as is the funding environment for the voluntary and community sector. Having been through a difficult period we are taking proactive steps to address these challenges. We are aware that there can be financial efficiencies as well as benefits for service users where organisations come together to respond to local need. Our new Chief Executive is being tasked with developing our relationships with local providers and looking for opportunities for growth through partnership working and collaboration. RCS has developed models of practice for working with local providers to meet local needs.

We will explore other opportunities for developing this work. Whilst we currently operate from four locations in South Oxfordshire, we are aware that there are other communities where services could be beneficial. We are also keen to further diversify our income streams through developing our training offer, as mentioned above. In developing this work, we will explore what else is on offer locally as well as nationally to pitch our work effectively. This work may also highlight opportunities for collaboration and/or affiliation with other providers.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

RCS operates without a single office base. We rent rooms from local providers and organisations. All our paid staff work from home. This means that our footprint as an organisation in terms of energy use remains low. We try to locate rooms and offer our service in venues that are close to public transport links and encourage the use of public transport by our staff, counsellors and freelance staff. We are in the process of developing an environmental policy for the organisation that sets out our position in relation to keeping our footprint low and how each member of our team can contribute to this.

We encourage the use of electronic mail as much as possible and try to keep our use of paper low. We have no real need for the use of plastics, and this is similarly discouraged. For meetings or events where we may use resources and/or catering we will always look to source materials from suppliers who have an ethos of sustainability and will use items that can be easily recycled as much as possible.

Earth Trust

Ref: SRev25-27/32

Financial Review

Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.

Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs.

As every year, we intend to apply to a list of trust/foundation grant-makers to support our costs for Volunteering. We estimate that we will be able to raise additional funding through this route based on the following evidence:

In the past we have secured grants specifically for Volunteering ranging in size from £500 - £28,000 from 17 different grant-making trusts, namely:

- Asda Foundation Bartlett Taylor Charitable Trust, Cecil Pilkington Charitable Trust, DLM Charitable Trust, D'Oyly Carte Charitable Trust, Gerald Palmer Eling Trust Company, Linley Shaw Foundation, Miss Kathleen Beryl Sleigh Charitable Trust, Mr And Mrs J A Pye's Charitable Settlement, Nineveh Charitable Trust, The Oxfordshire Community Foundation, Richard Radcliffe Trust, Sandra Charitable Trust, Schroder Charity Trust, The Doris Field Charitable Trust, The Swire Charitable Trusts, Truck Trust.

Whilst we cannot approach all of these again for grants in 2025, we think we can approach the following for the sums given:

- Asda Foundation £700, Bartlett Taylor Charitable Trust £1,000, Cecil Pilkington Charitable Trust £3,000, DLM Charitable Trust £3,000, Gerald Palmer Eling Trust Company £2,000, Linley Shaw Foundation £25,000, Mr And Mrs J A Pye's Charitable Settlement £1,000, Nineveh Charitable Trust, £2,500, Richard Radcliffe Trust £2,000, Sandra Charitable Trust £3,000, The Doris Field Charitable Trust £2,000, Truck Trust £500. Total £45,700.

We have been successful in fundraising for Volunteering in the past:

- 2020-21 we sought c£24,000 to 'rescue' volunteering during covid and raised £25,500.
- 2021-22 we sought £37,500 to build back fully and raised £32,407 (inc £9,097 Restart grant from SODC for various services including volunteering) plus 6,095 for a project training volunteers to lead wellbeing walks.
- 2022-23 we sought £38,779 and raised £25,167 (inc £9,167 from SODC Revenue Grant). So far in 2024 we are seeking £81,600 as we are now including ranger supervision of land management/conservation groups in our budget. Towards this we have raised £47,353 (inc £9,166 from SODC Revenue Extension Grant).

Earth Trust also has other sources of income as shown in the Funding Forecast.

Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future.

Our current budget (approved by our Trustees) represents a period of investment for growth towards financial sustainability and is underpinned by a robust plan:

- We are actively working on increasing our income and optimising our expenditure to reduce the operating deficit, with a projected turn to surplus by 2027 according to our long-term model.
- We're actively pursuing environmental stewardship schemes & research partnerships, to further support core programmes & innovative projects.
- Organisational donors in 2023 included: Adrian Swire Charitable Trust, Aspen Trust, Beard Charitable Trust, Bothwell Charitable Trust, Brickability Group Foundation, Cecil Pilkington Charitable Trust, DLM Charitable Trust, Doris Field Charitable Trust, Dorothy Holmes Charitable Trust, Environment Agency, Groundwork UK, Hobson Charity Ltd, Hugh Fraser Foundation, Natural England, Nineveh Charitable Trust, North Wessex Downs, Oxfordshire Local Enterprise Partnership

(OxLEP), P F Charitable Trust, Pharsalia Charitable Trust, Pye Charitable Settlement, Reed Foundation, Richard Radcliffe Trust, Sandra Charitable Trust, South Oxfordshire District Council.

- Our Centre Development project is a key driver for future financial sustainability, with operations beginning in late 2026 and expected to generate significant new income. The Centre Development construction will be funded by a capital fundraising campaign and release of assets/loan financing, demonstrating our commitment to diversifying funding sources and reducing reliance on core funding.
- We are strategically using our reserves to invest in growth. At the start of 2024, Earth Trust had £2,758,958 in reserve. £1,500,000 of this results from the sale of a major asset in 2020 and is allocated for investment in our centre development project in line with our strategic plan. The Board of Trustees is committed to managing these reserves in accordance with our reserves policy, which can be found in our annual accounts. This approach is viewed as an investment in our future, with the expectation of reducing our reliance on reserves from 2026 onwards as new income streams come online.
- Our commercial hire and fundraising activities are projected to show steady growth, contributing to our path towards financial sustainability.

This comprehensive approach, combining strategic use of reserves, new revenue streams from the Centre Development and ongoing optimisation of our operations, positions Earth Trust for long-term financial sustainability while continuing to deliver on our mission of connecting people with nature.

Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services.

Our finances were significantly affected by Covid 19 in 2020-2022. We laid off many staff but survived by securing grants (including from SODC), adapting our education and volunteering services and building back our commercial hire. We have rebuilt our staff team and have built back our charitable services strongly since then. For the past few years our Trustees have approved a deficit budget, partly while we were rebuilding after Covid but also because we are in a transition period diversifying our income base and moving to a more sustainable financial position without dependency on our founding donor/Patron.

Our current budget (also approved by our Trustees) represents a period of investment for growth towards financial sustainability and is underpinned by a robust plan to move from deficit to profit in 2026 as shown below:

- 2024 Total Income: £2,036,105; Total Expenditure: £2,286,746; Operating Deficit: -£250,64
- 2025 Total Income: £2,339,470; Total Expenditure: £2,490,756; Operating Deficit: -£151,286
- 2026 Total Income: £2,848,367; Total Expenditure: £2,761,239; Operating Profit: £87,127
- 2027 Total Income: £3,120,516; Total Expenditure: £2,933,708; Operating Profit: £186,807.

Our plan to address the deficit includes:

- Actively pursuing environmental stewardship schemes & research partnerships, to further support core programmes & innovative projects.
- Improved and expanded fundraising. Organisational donors in 2023 included: Adrian Swire Charitable Trust, Aspen Trust, Beard Charitable Trust, Bothwell Charitable Trust, Brickability Group Foundation, Cecil Pilkington Charitable Trust, DLM Charitable Trust, Doris Field Charitable Trust, Dorothy Holmes Charitable Trust, Environment Agency, Groundwork UK, Hobson Charity Ltd, Hugh Fraser Foundation, Natural England, Nineveh Charitable Trust, North Wessex Downs, Oxfordshire Local Enterprise Partnership (OxLEP), P F Charitable Trust, Pharsalia Charitable Trust, Pye Charitable Settlement, Reed Foundation, Richard Radcliffe Trust, Sandra Charitable Trust, South Oxfordshire District Council.
- A centre development project with operations beginning in late 2026 and expected to generate significant new income. Capital costs for this will be funded by a campaign plus release of assets (already earmarked, as detailed below) and/or loan financing, demonstrating our commitment to diversifying funding sources and reducing reliance on core fundraising.
- We are strategically using our reserves to invest in growth. At the start of 2024, Earth Trust had

£2,758,958 in reserve. £1,500,000 of this results from the sale of a major asset in 2020 and is allocated for investment in our centre development project in line with our strategic plan. The Board of Trustees is committed to managing these reserves in accordance with our reserves policy, which can be found in our annual accounts. This approach is viewed as an investment in our future, with the expectation of reducing our reliance on reserves from 2026 onwards as new income streams come online.

- Our commercial hire and fundraising activities are projected to show steady growth, contributing to our path towards financial sustainability.

The Service(s) / Activities

Responding to community need, consultation and inclusion

Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need.

The need for our programme is evidenced by:

Success of the programme: Running for 15+ years. Volunteer numbers increasing, most volunteer weekly and stay for 1-3yrs or 5-10 years. 2016: Queen's Award for Volunteering. Feedback from volunteers is extremely positive (qualitative and quantitative). Volunteers describe benefits including: being physically active, time in nature, a sense of purpose, learning/using skills, being part of a community and support with mental health. The latter ranges from people saying it helped their transition into retirement to those who attest that it contributed to their recovery from serious mental health problems. See Volunteer testimonials at: <https://earthtrust.org.uk/get-involved/volunteer/volunteer-testimonials/>. We attract/receive enquiries for participation in our programme from other local organisations - eg the launch of our Youth Volunteering Programme attracted Oxfordshire Youth Justice Service and Oxford Creators who are now partnering with us.

External evidence of benefits of volunteering. From a nationwide survey, the NCVO presents the benefits people report of volunteering. 89-68% of volunteers cite: enjoyment, making a difference, sense of personal achievement, meeting new people, broadening my experience of life, improving my mental health and wellbeing, contact with people from different backgrounds or cultures, gaining confidence, new skills and experience, feeling less isolated. 48% say that it also improves their physical health. See <https://www.ncvo.org.uk/news-and-insights/news-index/key-findings-from-time-well-spent-2023/>

External evidence of the importance to people of access to nature-rich green spaces: At a national level these are well set out by Natural England (See <https://designatedsites.naturalengland.org.uk/GreenInfrastructure/Principles/GIPinciples.aspx>). Within South Oxfordshire the sites that Earth Trust manages with the incredible help of our volunteers, contribute significantly to the local provision - both by providing sites within 15 minutes walk of people's homes and by providing access to the 500+ hectare, landscape-scale Earth Trust farm including Wittenham Clumps.

Engaging people with nature and the environment through their local green spaces. Natural England has also shown that people feel passionately about their local places and so engaging people through experiences in and caring for their local places is a great way to get people to engage more deeply with environmental issues as a whole.

Our Volunteer Programme contributes across all of the Council's draft Corporate Plan priorities:

- Action on climate change and nature recovery. This is central to Earth Trust's mission. Many volunteers' work contributes directly to improving habitats; other volunteers work with educational groups or at public events to engage local people with nature and farming.
- Inclusion, accessibility and accountability. We are striving to make the Volunteer Programme increasingly accessible offering a range of times, locations and including recently Youth and Weekend options. We have a volunteer forum and use our annual survey to involve volunteers and gather feedback and ideas for improvement.
- Thriving and healthy communities. Our social events for volunteers plus training, learning and interest sessions build our community integrating those who volunteer in different roles with staff and members into one big family.

- Homes and infrastructure. Earth Trust Land Management work parties maintain vital paths and many local greenspaces.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Consultation

We carry out an annual survey of our Volunteers to seek their views on volunteering at Earth Trust and we take into account their view/ and input. In general they like what we do and want more of the learning, skill-sharing and social events that we offer. Highlights from our 2024 survey (response rate 32%) are:

- Motivation: Volunteers are driven by a desire to take action for the planet and learn new skills.
- Positives: High appreciation for flexibility, variety, and support from Earth Trust. Volunteers feel supported and recognised for their expertise.
- Areas for Improvement/ where views are mixed: Learning & Development: While the program is appreciated, scheduling can be challenging. Forums: Preference for online sessions or holding them at the centre, with some reluctance to attend in person while others are keen to have a voice.

Involvement

We set up a Steering Group in 2023 of staff and volunteers and this group consulted and then devised together the current 3 year strategy (2023-26). We now have a Volunteer Forum to enable volunteer feedback and involvement as we deliver against the strategy.

Vulnerable groups

- From our 2024 survey we know that most of our volunteers are in the 60-80 years age category. Whilst they would not all describe themselves as 'elderly' many do cite physical and mental exercise, continuous learning/keeping their brains and bodies active in retirement and the social side of volunteering as very important.
- Vulnerable young people: we are working with Oxfordshire Youth Justice Service and Oxford Creators. Their service users have been visiting our Land Management groups with 1-1 support. We have been learning from this and hope to increase and tailor what we can offer to these young people.
- Our education volunteers support our Earth Explorers programme which works weekly with small groups of young people aged 11-19 with profound and multiple learning difficulties.
- Although taking part in our conservation/land management groups generally requires a good level of physical mobility, we have many other roles for those with mobility issues. We consult with and take on the advice of service users; for example from one of our Patrons who has limited mobility, a regular and active volunteer with a prosthetic limb and a wheelchair user who takes part in our volunteer training sessions.
- We ran a pilot project with Aspire Oxfordshire during which we co-created a learning and volunteering programme for service users of Aspire (those facing economic challenges from homelessness, addiction, unemployment etc) and are fundraising to launch this as a full programme.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Our vision of accessible, engaging green spaces where nature and people thrive in balance is rooted in principles of equality, diversity and inclusion (EDI). This commitment drives our mission to champion access to natural green spaces for everyone and is woven into the fabric of our organisation and strategic planning.

Internally, in relation to employment, we strive to create a diverse and inclusive workplace where all staff can be themselves. We've introduced new metrics to track socio-economic background and are working with partners like the Race Report and Wildlife and Countryside Link to contribute to sector-wide understanding and action. We record employment EDI data, using this to assess the progress of action plans for under-represented groups. Our recruitment processes emphasize equality of opportunity, encouraging applications regardless of personal characteristics, implementing 'blind' recruitment, skills-based job descriptions and removing requirements for degrees or set years of experience to reduce bias.

Our commitment to EDI extends to our Board of Trustees. We have established an EDI working group with Board and team members and seek to recruit trustees who bring skills, insight and lived experience from communities traditionally underrepresented in green spaces.

In our programmatic work, we prioritise making nature accessible and inclusive for all:

- We design our visitor experiences, public programming and community engagement initiatives to be welcoming and inclusive, breaking down barriers to make our events accessible to those who would not traditionally engage with green spaces.
- We have over 200 active volunteers and systematically collect EDI-related data.
- Our youth volunteering programme and Earth Explorers initiative engage young people in conservation and environmental stewardship, providing valuable skills and experiences, particularly for those struggling in mainstream education.
- We work alongside the communities we wish to engage with as facilitators, not providers, ensuring beneficiaries are embedded in our projects as co-creators.
- Our education programme actively engages SEN visitors, ensuring children with special educational needs benefit from outdoor learning experiences. We're also investing in staff development to improve our established programme for SEN learners.
- Through a partnership with Activate Learning we are creating, for enrolment for Sept 2025, a skills-based learning programme for young adults including targeting those not in education, employment or training (NEETs).
- We conduct research to better understand our different audiences and their needs, including non-visitor research focused on local communities to understand barriers to access.

Through strategic partnerships, we've launched initiatives that demonstrate our commitment to EDI, such as engaging diverse youth in environmental education, creating pathways for underrepresented groups in the environmental sector and working directly with new beneficiary groups to understand their needs in relation to protected landscapes. These efforts not only enhance our programmatic work but also inform our approach to creating more inclusive and accessible green spaces for all communities.

By integrating EDI principles into our organisational culture, governance and programmatic work, Earth Trust is creating a more equitable, inclusive environment both in our organisation and in the green spaces we manage.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Our EDI working group (with Board and staff members) will seek reports from our member of staff responsible for recruitment and tracking our progress against employment EDI data and representation on the Board, including those who are traditionally underrepresented in green spaces organisations.

Our site has disabled parking with a sloping route to avoid steps. Vehicle access can be arranged to avoid steps and reduce walking distance. To accommodate one or two service users we can use a vehicle to transport people around the green spaces. We are fundraising for a vehicle to use more regularly for public events.

We invite visitors to events to take part in surveys and feedback which enables us to track some demographic data, if we are reaching new people and people's level of satisfaction with the event and the facilities. We share this within our organisation and use it to adapt future events. As we gather more data we will be able to track trends and gather stories about success/room for improvement.

Our April 2024 Inclusion and Diversity Survey of Volunteers has enabled us to set a clear baseline for EDI. Based on nationally used questionnaire formats, we included questions on: sex and gender identity, age, ethnicity, disability and health, sexual orientation, religion and caring responsibilities. We intend to repeat this survey every 2 years. More generally annual volunteer surveys have already enabled us to see the progress we've made on improving the gender balance (historically our volunteers have been disproportionately older and male compared to the local population). The success of our Youth Volunteering

Programme (both in attracting participants directly and attracting the attention of partner organisations who want to bring vulnerable young people only to the programme) shows that we have been successful in adapting to attract under-represented groups.

Our Earth Explorers programme continues year on year to be booked by schools bringing students (aged 11-19) with profound and multiple learning difficulties and those struggling in mainstream education.

Our Walking in Nature and Growing Places pilot were successful. For Growing Places we worked alongside the community and users of Aspire Oxfordshire as facilitators, not providers, ensuring beneficiaries were embedded as co-creators. The evaluation of the project was positive.

We are aware of the need to track data, learn best practice from others and assess our success continually. Having baseline data in all areas will enable us to know if we have been successful as we go forward.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

50,941

Please explain how you have determined the number of beneficiaries.

Volunteers contribute across the board to Earth Trust's charitable activities so this number includes all those who benefit from those activities and services - as well as the volunteers themselves who give very generously but also attest to a range of benefits they receive.

This figure is based on summing up numbers from recent data:

Volunteers: 251 people who, in the 12 months to Sept 2024 gave 17,379 hours caring for habitats & contributing teaching, wildlife surveying, office & hosting skills. Using a sector-wide standard, this has a value to Earth Trust of £198,816.
130 corporate volunteers

General public: Minimum of 200,000 visits/year to Wittenham Clumps and other green spaces maintained by Volunteers. Some of these will be repeat visits so, for the purpose of this calculation, I suggest that this represents c40,000 actual people each visiting 5 times. We have people and car counters around the entrance points to Wittenham Clumps. We combine information from these to make a fair estimate. We also occasionally survey how many people come into the main Clumps Car Park per car. We do not have counters at our community reserves so, although these sites receive many visitors, they are excluded from the figure - hence we are very confident to say "at least" 200,000 visits.

6,400 people attending events. These are heavily supported by volunteers in a huge range of public-facing roles including contributing to events, selling tickets, support car parking etc.

Schools and holiday programmes: These are all supported by volunteers including a specialist team of skilled and qualified volunteers. 3,562 school pupils aged 4-16, in the 12 months to 31 July 2024, through Earth School. 559 children outdoor learning workshops in the holidays. 39 young people aged 11-16 with SEND through Earth Explorers. These 39 children took part in 1,287 pupil visits; ie an average of 33 visits for each pupil during the year.

Please describe who will directly benefit from your services/activities.

The direct beneficiaries of our volunteer programme are the people from South Oxfordshire who live reasonably locally to our sites - ie from Abingdon, Didcot, Wallingford and surrounding villages and who have the opportunity to join our volunteer community. Although there is limited public transport to the farm at Little Wittenham and most arrive by car, some volunteers come by bicycle. The community reserves in Abingdon, Didcot and Wallingford are accessible to many people on foot.

Most of our volunteers are in the 60-80 age group, a group which is often vulnerable due to physical and mental health problems and loneliness.

A small number of our volunteers live with physical disabilities. Several of our volunteers have been open about how volunteering has helped them to overcome severe mental health difficulties including suicidal thoughts.

Our young volunteers include vulnerable young people who have joined our activities with the support of Oxfordshire Youth Justice Service and Oxford Creators. Oxfordshire Youth Justice Service is a partnership between Oxfordshire County Council departments (social and health care, community safety, resources), Thames Valley Police, County Magistrates, Mental Health Trust, NHS Primary Care Trust and the Youth Offending/National Probation Service. Its aims are to: Prevent re-offending; Help young people repair the damage they have caused by thinking about the effect it has on their victims; Encourage young people and their families to take responsibility for their offending; Reintegrate offenders into the wider community; Contribute to protecting the public by supporting local crime-reduction techniques. Oxford Creators is dedicated to embedding unstoppable confidence in children who are at risk of exclusion or do not attend school by providing mentoring, mental health support, employability skills and fitness sessions.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Protect and restore our natural world: our service enables people to contribute to protecting and restoring our natural world. 251 people who, in the 12 months to Sept 2024 gave 17,379 hours caring for habitats & contributing teaching, wildlife surveying, office & hosting skills. Using a sector-wide standard, this has a value to Earth Trust of £198,816 and therefore complements Council expenditure in this area.

Action on climate emergency: our service enables local people to help run public events about Food and Farming and workshops (through Earth School) which engage school children with the climate. These events and school workshops are designed to engage people with climate issues, especially food and farming and the impact that their choices in these areas have on the climate. Volunteers were critical to the creation and now the running of a kitchen garden which is used with school groups to show the Food-to-Fork journey.

Homes and infrastructure that meets local needs/Improved community well-being: Providing access to nature and events in nature for volunteers and the general public complements council provision of green space and play areas for all.

Openness and accountability: Our volunteer programme is open to all. We publicise it widely and we know we are successful at this as we receive many enquiries, recruit many new volunteers and have enquiries from organisations wanting to tap into our offer for their service users.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Action on climate change and nature recovery

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Through our volunteer programme we aim to:

- maintain and enhance accessible green spaces in South Oxfordshire for residents of South Oxfordshire and beyond, in line with SODC's Nature and Climate Action Plan and Oxfordshire's Local Nature Recovery Strategy. This means maintaining and improving access as well as the quality of habitats.
- engage people directly with the care of publicly-accessible green spaces so raising public awareness of the need for action on climate emergency and nature recovery.
- engage people with the cause of engaging the public through events and programmes for schools with the triple threats of climate, biodiversity loss and the decline of health and wellbeing and how access to nature and natural solutions can contribute to human health and wellbeing. We are building Communities for Change locally and nationally as communities committed to action on climate emergency and nature recovery.
- offer our volunteers insights and learning about food, farming and management of greenspaces which balance public access with other land services including food and wood product production, protecting wildlife, alleviating flood risk, soil sustainability and more.

We will know though:

- surveys of wildlife on our sites (butterfly transects, bat surveys, bird monitoring) and wildlife reports

eg through camera traps and reported sightings of rare/endangered species

- land management records of actions taken against farm stewardship: eg of hedges maintained/laid, wildflower meadows mown and grazed, invasive species weeded from key areas as planned, health and safety surveys carried out to ensure paths and gates are safe for public access
- numbers of people taking part in our volunteer programme, using our green spaces and attending our events
- responses to our surveys of our various audiences whether we are having an impact on people's understanding and their reported behaviour e.g. when people say they will choose different foods/ingredients or will choose local suppliers after coming to a food and farming event
- responses about improved awareness from teachers and pupils through our feedback surveys after school visits and educational events.

Action on Climate Emergency and Nature Recovery is fully integrated in what we do. In 2023 we carried out a full GHG review and produced a report. On the positive site, this showed the farm as sequestering 968 tonnes of CO₂/year, calculated using the Farm Carbon Toolkit in a project funded by the North Wessex Downs AONB Farming in Protected Landscapes programme; see https://earthtrust.org.uk/what_we_do/farm-carbon-audit/. Where the report identified areas for improvement, we are taking action. Some we have already acted on eg reducing Scope 3 emissions (indirect emissions not controlled by us) eg by encouraging car sharing to our sites, use of local suppliers by those hiring our wedding and conference facilities. Others we are working on eg Scope 1 emissions - e.g. reducing the use of our biomass boiler by introducing more local rather than site-wide heating options. We will know when we have made progress by repeating the review and monitoring progress against the 2023 baseline. We already have solar panels.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Our ambitious vision requires partnerships to scale our impact. We collaborate with diverse organisations to bridge gaps between research, practice and people, working towards a future where nature and people thrive together.

CURRENT PARTNERSHIPS WITH INVOLVEMENT OF VOLUNTEERS:

- We are collaborating with the Future Trees Trust on a project to create Britain's first tested oak seed orchard on the Earth Trust Farm. Volunteers have already been involved in the site preparation and will be involved on an ongoing basis with the care and maintenance of the project.
- In partnership with the North Wessex Downs National Landscape, we have recently begun our Bessie's Field project, funded by a Heritage Fund Species Survival Grant. The project will demonstrate new nature-friendly farming practices. Volunteers will be involved in many ways, both hands-on with the farm work and as we communicate the progress and outcomes of the project to our audiences.
- We are developing a biodiversity monitoring project with the Wallingford-based UK Centre for Ecology & Hydrology which will depend heavily on volunteers and will enable volunteers to develop and use wildlife identification and monitoring skills.
- Our Inspiring Future Green Leaders project, funded through a partnership agreement with Brickability Group Foundation, engages five primary schools in Reading annually, giving approximately 450 pupils the opportunity to experience and learn about the natural environment. The school visits are supported by Earth Trust volunteers who help engage children with the activities during their visits. Volunteers have also played a vital part in visiting some schools to prepare areas of the school ground for projects co-designed with the classes.

PARTNERSHIPS OFFERING WIDER ACCESS TO VOLUNTEERING:

- In relation to our Youth Volunteering project we have been working with the Duke of Edinburgh Open Award organisation. We are now working with Oxfordshire Youth Justice Service and Oxford Creators to enable vulnerable young people to benefit from volunteering with Earth Trust.

- We are currently working with Berkshire College of Agriculture to develop a structured volunteering activity which will support students taking a level 2 course in animal management.
- In a partnership with Aspire Oxfordshire we ran Growing Places, a pilot project offering co-design of a programme connecting people to nature and their local landscape specifically for those facing homelessness, poverty and other disadvantages. The pilot showed that engaging people, including through volunteering, had the potential to improve wellbeing, reduce anxiety and create pathways to employment and long-term volunteering opportunities.
- Through a partnership with Activate Learning we are creating, for enrolment for Sept 2025, a skills-based learning programme for young adults including targeting those not in education, employment or training (NEETs).
- We continue to engage employees of local companies with volunteering. Demand for this continues to grow as more companies offer their staff volunteer days as part of the company's CSR provision. When we are invited to do so we have worked in partnership with a small number of companies to promote volunteering through their internal comms.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

It is free to volunteer with Earth Trust and join our Volunteer Community. Thus we will always have unrecoverable direct costs associated with the Programme. However, at an organisational level, we are currently following a strategy which includes moving away from dependency on our founder donors to a more sustainable financial model, by diversifying our income sources. In particular:

- We are actively working on increasing our income and optimising our expenditure to reduce the operating deficit, with a projected turn to surplus by 2027 according to our long-term model.
- We're actively pursuing environmental stewardship schemes & research partnerships, to further support core programmes & innovative projects.
- Organisational donors in 2023 included: Adrian Swire Charitable Trust, Aspen Trust, Beard Charitable Trust, Bothwell Charitable Trust, Brickability Group Foundation, Cecil Pilkington Charitable Trust, DLM Charitable Trust, Doris Field Charitable Trust, Dorothy Holmes Charitable Trust, Environment Agency, Groundwork UK, Hobson Charity Ltd, Hugh Fraser Foundation, Natural England, Nineveh Charitable Trust, North Wessex Downs, Oxfordshire Local Enterprise Partnership (OxLEP), P F Charitable Trust, Pharsalia Charitable Trust, Pye Charitable Settlement, Reed Foundation, Richard Radcliffe Trust, Sandra Charitable Trust, South Oxfordshire District Council.
- Our Centre Development project is a key driver for future financial sustainability, with operations beginning in late 2026 and expected to generate significant new income. The Centre Development construction will be funded by a capital fundraising campaign and release of assets/loan financing, demonstrating our commitment to diversifying funding sources and reducing reliance on core funding.
- We are strategically using our reserves to invest in growth. At the start of 2024, Earth Trust had £2,758,958 in reserve. £1,500,000 of this results from the sale of a major asset in 2020 and is allocated for investment in our centre development project in line with our strategic plan. The Board of Trustees is committed to managing these reserves in accordance with our reserves policy, which can be found in our annual accounts. This approach is viewed as an investment in our future, with the expectation of reducing our reliance on reserves from 2026 onwards as new income streams come online.
- Our commercial hire and fundraising activities are projected to show steady growth, contributing to our path towards financial sustainability.

This comprehensive approach, combining strategic use of reserves, new revenue streams from the Centre Development and ongoing optimisation of our operations, positions Earth Trust for long-term financial sustainability while continuing to deliver on our mission of connecting people with nature.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Earth Trust is carbon negative. We undertake a range of activities, including farming land, educational visits, public events and free access to green space, private hire bookings and cattle grazing. We actively pursue a sustainable approach, implement regenerative agriculture and seek to limit our carbon footprint. As we take responsibility for the full scope emissions that our activities create, we have sought out opportunities to make our operations and spaces more sustainable. This has included improved walking and cycling routes, installing bike racks to encourage bike use, the purchase of solar panels, the treatment of waste-water on-site and advocating for improved local green spaces.

We actively contribute to action and policy development on nature recovery. In the last year alone our actions have led to an increase in farmland birds and Great Crested Newts on our land.

Our audits identify areas for improvement, leading to action. Some we have already acted on eg reducing Scope 3 emissions (indirect emissions not controlled by us) eg by encouraging car sharing to our sites, use of local suppliers by those hiring our wedding and conference facilities. Others we are working on eg Scope 1 emissions - e.g. reducing the use of our biomass boiler by introducing more local rather than site-wide heating options. We continue to review and monitor progress against our baselines – sharing our learning with others when we can.

Benson Millstream Day Centre	Ref: SRev25-27/23
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. Although no grants have yet been secured for 25/26 & 26/7 the Trustees work hard to apply for additional grants as they become available from various Organisations.</p> <p>The Trustees reserve the right to increase the price of the services offered, although we are cognisant of the fact that a significant number of customers are under financial pressure and would struggle to pay any significant increase in charges.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Benson Millstream Centre launched the Benson Millstream Supports Club [BMCS] in April 2024 at our open day, and via our newly revamped website www.bensonmillstreamcentre.org . This is where we encourage donors to sign up as 'supporters' by pledging an annual donation or a one-off donation in return for our quarterly newsletter and prior notice of fundraising event.</p> <p>The Fundraising team plan and organise a number of fundraising events during the calendar year.</p> <p>Publicity & Marketing - A new leaflet advertising the services offered by the Centre will be hand delivered to properties in Benson and the surrounding area. We are hoping that increased publicity of the Centre will also attract additional hire income for the times when the Centre is not in use for Day Centre activities.</p> <p>Trustees continually actively search for grant opportunities.</p> <p>Please note the current cash at bank values includes the additional £14,000 founders capital which is now required to be re-invested as per the original terms of the bequest. The use of founders capital was permitted as per agreement from the original founders relatives to facilitate the building expansion project which has taken place over the last two years.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. The Centre income continues to be affected by outbreaks of Covid 19, due to the vulnerable health demographic of our Customers. For example as recently as August 2024 three members of the Management staff (Manager & Relief Managers) were affected by Covid 19 which led the Trustees to make the decision to close the Centre for a week, reducing the service to a home meal delivery option only, whilst the Centre was deep cleaned and the staff recovered.</p> <p>Due to the age profile and related health conditions of our customers, we do experience a number of 'on the day' cancellations during Covid and other seasonal illness outbreaks this does have an impact on income streams of the Centre, as no charges are made for cancellation or non attendance.</p> <p>The Centre has been severely financially hit by the cost of living increase of food, and energy costs.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. The huge increase in the number of local residents and the ageing population means that there is definitely a current and increasing need for the services that the Millstream Day Centre can provide.</p> <p>Based on our many years of experience Millstream Centre customers who become more frail, or who have short term illnesses (e.g. Covid) benefit from our home delivery / outreach service.</p>	

Liaison with various groups in the community also help us to identify need, and help us to flex our services to meet this need, for example, we chair and arrange a bi-monthly liaison group, we have regular contact / liaison with the local GP practice, AGE UK, local Care Homes, and Mental Health Organisations.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

An open day was held in April 2024 to showcase what the Centre has to offer. We felt that this was important to inform new residents in Benson and the surrounding areas.

We continue to invite comments from our existing customers and relatives and undertake an annual customer satisfaction survey, ensuring that we constantly review the services offered in response to this survey.

Trustees of the Millstream Centre organise and chair, a bi-monthly Community Liaison meeting involving local Councillors, staff from the Benson helpline and other interested community groups- A copy of the meeting minutes have been attached to this application, we use this dialogue and interaction to plan the services we deliver.

The Centre has regular contact / liaison with the local GP practice, AGE UK, the local Care Homes, Mental Health Organisations , and dementia advice groups to ensure that we can provide services to cater for customers requirements.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

All staff and volunteers are required to participate in an Induction process when joining the Centre. This induction includes awareness and understanding all relevant policies and procedure. The Equality & Diversity policy is included in the Induction program.

The Trustees are responsible for ensuring adherence with the Equality & Diversity policy and are required to review the policy on an annual basis.

An example of ensuring inclusion is demonstrated by both staff and volunteers attending dementia awareness events in order to be able to tailor our services to help customers who are suffering from dementia, following this training we have now purchased dementia friendly blue crockery and we ensure that staff / volunteers are available on a 1:1 basis to help with eating. Taking this action not only benefits our Customers but also gives much needed respite time for carers.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

The Centre makes use of an annual feedback questionnaire, and consults on a regular basis with relatives / carers.

The Centre will continue dialogue with local GP practice, AGE UK, the local Care Homes, Mental Health Organisations , Dementia advice groups to ensure that we continue to provide services for customers requirements.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

150

Please explain how you have determined the number of beneficiaries.

We are open three days per week. Customers attend on one, two or three sessions per week, we serve on average 20+ meals each sitting We also deliver meals at home three days per week, again customers use this service on all or any of these three days.

Millstream Mugs which is open to all use the Centre on Tuesday morning providing beverages and a place to socialise.

The Centre is used by a number of Community Groups, including the Guiding Trefoil guild, the Royal British

Legion and U4A.

Please describe who will directly benefit from your services/activities.

The following vulnerable groups will benefit from the Benson Millstream Services - 100% of Customers are from the following vulnerable /priority groups:

- Older Residents of Benson, and the surrounding parishes
- Customers who suffer from Dementia and other debilitating illnesses.

Other's who benefit from our services:

- Family / carers who are able to have some respite time during the Centre operating hours
- A significant number of individuals who choose to volunteer at the Centre, some of whom are signposted from their GP practice.

We also offer volunteering opportunities for young people undertaking Duke of Edinburgh awards.

The Centre was used as to provide English classes to Ukrainian refugees who moved into the area.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

The delivery of freshly prepared nutritious meals at home help to ensure older residents can live independently for longer. Our delivery drivers also offer outreach services which include collection and delivery of prescriptions, shopping etc , all of which reduce the need for intervention and support from council services.

GP's, Age concern, Mental Health Charities etc., recommend our services, which if unavailable may result in the need for intervention by Council led services.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

We are confident that increasing the reach of our delivery service and help hub, providing a freshly cooked nutritious two course meal and offering the services of our help hub will help to promote the health and wellbeing among the older residents of Benson, and the surrounding parishes including Wallingford.

Based on our experience customers who live alone and become less mobile or have an illness which prevent them attending the Centre, (either on a temporary or permanent basis) really appreciate the delivery service and look forward to interaction with the delivery team and the Centre Manager who keeps in regular contact with them , checking in and understanding if they need any further assistance. Without this grant we may not be able to provide an outreach / delivery service.

Feedback from family and relations of customers reassure us that the nutritious value of the meals are invaluable to our elderly customers who are unable to prepare their own meals due to frailty issues and or dementia, and knowing that some one checking in with them also give them peace of mind.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

The Benson Millstream Centre organise and chair a bi- monthly liaison committee.

The purpose of the liaison committee is:

- To ensure that relevant local groups are fully informed in respect of all Millstream Centre activities and plans
- To listen to and encourage their advice and suggestions for improvement
- To make recommendations to Centre Trustees for their consideration where significant change is required.

Members of the Committee are:- A Chairperson: a minute secretary/note taker; nominated members of any local interest groups, any local Parish Council, District Council and County Council representatives who wish

to participate and the Centre manager. Additional members may be co-opted for specific tasks. Co-opted members need only attend meetings regarding the subject(s) for which they have been co-opted.

The Millstream Centre Manager and Trustees liaise with the local GP practice staff including the social prescriber to identify potential users of the service, including both Customers and volunteers. The Centre Manager is in regular contact with XXXX from Benson House re mental health awareness issues, we have regular contact with the local Age UK staff, and other care providers within the area who identify individuals who would benefit from the services we provide, we also have regular contact with the Manager of the SOHA housing provision in Benson

Trustees recently met with the Warden and Admin staff from the Ewelme Almshouses Trust to explore ways in which can mutually support residents and customers.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

In April 2024 via our revamped website, and at our open day, we launched the Benson Millstream Supports Club [BMCS]

BMCS allows supporters to sign up to donating on an annual basis in return for a quarterly newsletter and priority access to fundraising events. The Centre relies on Charitable donations on an annual basis, and becoming a BMCS donating via our CAF Account helps us to secure regular donations to help secure our future.

The Centre will continue to liaise with other Community / Charitable Groups which interact with older adults to explore areas of common activities and developments that are mutually beneficial.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

The Centre recently refurbished the Garden area taking advice from the Benson Gardening Group to ensure that plants are insect friendly and sustainable.

All expenditure purchasers consider the environmental impact of the products / services we are require.

<p>NOMAD Youth and Community Project</p>	<p>Ref: SRev25-27/13</p>
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. Nomad has always met our fundraising targets in 26 years and are proud of our long track record of meeting these targets. We are proactive in researching and applying for grants. Every year we face a shortfall which we make up through the year. We are continually developing work with local and national funders.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. Funding is a year upon year challenge which Nomad has undertaken successfully since 1996. One staff member is now employed for 15 hours per week to explore funding opportunities and complete applications. This has resulted in developing relationships with the National Lottery and Postcode Lottery where funding is available for larger grants over multiple years. There is also considerable time going into work with locally based charities and philanthropists which is proving productive. These opportunities will be followed through and developed further in the future.</p> <p>Moving forward we will continue our yearly strategy on our finances and review quarterly between the fundraiser and Project Manager and the Trustees. This enables us to plan and identify gaps. We work with local and national funders to expand develop our relationships. This helps us with funding. We will develop a 1 year and a 5-year funding plan with our trusted partners, the Nomad Trustees and our Advisory Board. As a result of our work, we have a pledge for 10% of our funding requirements for the next 10 years.</p>	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. Funding was challenging during the Covid 19 pandemic, we worked hard to diversify our services. We were able to access funding available for food distribution and supported families who were significantly disadvantaged during the pandemic.</p> <p>The increased demand on the foodbank has enabled us to raise our profile in Henley on Thames and surrounding villages. Resulting in a growth in engagement with our Facebook profile which has led to an increase in gifts and donations towards our work. This support has continued, and we have been able to build on this.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. The majority of our work is referral based and, we have developed good relationships with many agencies who refer into us. This includes; Social Prescribers at local GP practises, Social Services, Citizens Advice, Christians Against Poverty for debt relief, schools, and the John Hodges Charitable Trust to name a few. Nomad does not believe in a one size fits all approach and tailors its work towards each individuals / family's needs. For example, we may invite one parent to join a parenting group, and another would be more suited to one-to-one work.</p> <p>As Nomad has built a good reputation in Henley on Thames and surrounding villages, we also accept self-referrals. Often these are people who we worked with during their school years who return to us for support as they transition into adulthood, addressing issues such as housing, debt, substance misuse, relationship breakdowns, alongside general advice and support.</p> <p>The need for our work is evidenced through:</p> <ul style="list-style-type: none"> • Number of referrals from statutory agencies including local schools, social services, job centre, CAHMS 	

- Number of referrals from locally based charities/voluntary sector organisations such as Citizens Advice, Christians Against Poverty, local YMCA and more
- Number of self-referrals including people who have used Nomad services before, people who have been recommended by other users and others just desperate for some kind of support. With Henley being subject to rural isolation, and many statutory services at full capacity, Nomad has become a first port of call.

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

Whilst our work is shaped by the needs of our users, stakeholders also play a large part in what we can offer. For example local schools paying for tutors to support students who for various reasons cannot be managed within the school setting. Regular meetings are held with school leadership teams to ascertain need and appropriate ongoing support.

A recent example of young people shaping the service occurred within our After-School programme. A weekly youth club targeted at specific young people to engage them in positive activities was being attended by some very lively youngsters. This was proving difficult for some young people who wanted a quieter environment. Nomad was able to respond by setting up a separate weekly session for them which we called Nomad unwind.

Nomad is open to all and as referenced earlier in this application does not believe in a one size fits all approach. There is no such thing as a typical day for our workers, one day they may be accompanying an individual to a medical appointment or helping them complete a PIP appeal. Our workers are also heavily involved in Social Services meetings, (Team Around the Family, Child in Need and Child Protection) and are trusted by the service user and social services to deliver bespoke support to families and young person. Our schools work and 16+ mentoring programs address the issues surrounding educational disadvantages by looking at the whole picture and tackling one issue at a time. This may include work on confidence and self-esteem, creating healthy routines, support with applications and where appropriate our onsite bespoke tutoring program to help them achieve their GCSE English and maths.

Our schools work is based on a referral system with input from ourselves on young people we may have encountered during our detached youth work sessions and targeted afterschool and holiday activities. Where it is not possible to see the young person in school, we will create opportunities for them to engage with our staff during our targeted afterschool activities and also our UK based residential. Many of the young people we work with at school return to us for support once they have left school and are making the transition into college education or employment / apprenticeships. Nomad staff work with the young person with an aim to keep them in education and to encourage them to persevere and develop resilience.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation's services/activities meet the needs of all users, including vulnerable/priority groups.

Nomad is open to all no matter what their circumstances and we work hard to ensure that their needs are met.

One example of this is our work with young person A (YPA). YPA comes from a family where there is intergenerational low academic performance and poverty. YPA became known to us via our schools mentoring program and engaged well with us achieving high grades in their GCSE's which enabled them to attend college and take their 'A' Levels. During their early college years, we were able to maintain light touch work with them but ultimately lost contact. During a detached youth work session, we bumped into YPA who was more than happy to talk to us. During this conversation they stated that they would like to attend university but were not sure how to do this. Nomad workers were able to assist with this and helped them with their applications and took them to open days. YPA did well in their 'A' Levels and they were able to accept a place at their preferred university. Nomad were able to obtain financial grants for YPA so that they started their university career fully equipped and supported for their rent payments. YPA excelled at university passed with high marks and went onto to study a masters. Contact with YPA is ongoing and we will be there to support them for as long as they need it.

Nomad is open to and committed to supporting those from every strata of the community that includes people of different race, people with disabilities both physical and many now presenting with neuro divergent conditions and people regardless of social or economic standing.

One highlight of the Nomad Summer 2024 activity programme was being able to take a wheelchair bound 15-year-old young person (YPB) who has spina bifida on their first trip onto the river during one of our paddleboarding days. Their mum informed us that on the day they had woken up at 6am in the morning because they were so excited and the joy on YPB's face as they sat on the board with one of our instructors, learn to use a paddle and then be able to swim and float around in the river was so exciting to see. It was amazing to be able to include them in the activity.

This is a good example of how we try and adapt activities to ensure we can safely include a diverse range of young people who may have different emotional and physical needs.

YPB also engages in our weekly youth group where the lift in our building again ensures that they are able to access our facilities and activities.

YPB comes from a family with a low income and we have been able to support the wider family with food parcels and purchasing of white goods from our help fund partnership with John Hodges.

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Nomad is proud our track record in the local community and sees many people moving onto independent living and having their social services involvement stepped down. An example of this is a family who were facing pre-legal proceedings from the local authority whereby their children would be removed and taken into care. Nomad were able to support this family to the point that they are now being stepped down to Team Around the Family (please see case study further on in application).

We keep track of the young people and families we work with and are pleased when they no longer need our support, although our door always remains open to them.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?

300

Please explain how you have determined the number of beneficiaries.

The Nomad system of record keeping will evidence the number people we support, the number of interventions and the various categories of provision they received.

Please describe who will directly benefit from your services/activities.

Nomad supports a wide range of children, young people and families many of whom suffer economic hardship and/or are disadvantaged through complex social issues. This often results in generational cycles of dependence on benefits, unemployment and general isolation within the community.

They include:

- Young people 11 – 16 years (secondary school age) who may be encountering drug and alcohol issues, family relationship breakdown, poor school attendance, low esteem and confidence, anxiety resulting in poor mental health
- Young people 16+ many of whom have left school with no qualifications and find themselves not in education, employment or training
- Parents of young people in 1 & 2 above who may be struggling with drugs/alcohol/ domestic abuse, housing and benefits issues, debt, poor parenting skills, lack of confidence and low self-esteem resulting in mental health issues
- Children 0 – 11 years who may be siblings of above or referred by statutory agencies
- Older people may receive support via the food bank and being linked into various community activities.

Within all of these groups there are users with physical disabilities, increasingly some with neuro divergent conditions and people from numerous ethnic backgrounds.

Many of the families and young people we work with are educationally disadvantaged with little prospect of

passing their GCSE's and / or a family history of educational disadvantage. Nomad will work with these young people to ensure the best possible outcomes. This could include one to one tutoring at our site, sitting their GCSE's with us rather than at school where they would be overwhelmed, mentoring support and much much more.

Young person (YPC) was a school refuser and missed most of their Year 10. Things were not looking hopeful that they would be able to return to school and there was a danger they would leave school without any qualifications. At the beginning of Year 11, the local secondary school and social services approached Nomad to see if we would be able to facilitate some 1 to 1 tutoring sessions at our offices with the hope that YPC would be able to sit their GCSE exams in English and Maths. YPC comes from quite a dysfunctional family where Dad is an alcoholic and mum suffers from extreme anxiety which has had a significant impact on YPC. Nomad agreed to weekly tutoring sessions and our staff had to work extremely hard to engage YPC to ensure they firstly attended, but also felt comfortable in the Nomad environment. We found that after a wobbly start YPC engaged remarkably well with the Nomad tutor. Nomad were able to provide a safe, welcoming, nonjudgemental and structured space which enabled YPC to get to a place where they could sit their GCSE exams. The anxiety of returning to school to sit examinations in the main school hall threatened to derail things so Nomad staff undertook invigilation training and YPC along with 3 other students were able to sit their exams in the Nomad offices. YPC received a pass in maths.

Please describe how the services/activities that you are requesting funding for complements council services, and/or indirectly reduces the likelihood of needing support from the council.

Nomad offers early intervention work to avoid people being in crisis, particularly with families who might otherwise have social services involvement. Where people are already with social services we will work in partnership with the parent and social workers to reduce the risk to the young person / children with an aim to have the level of social services involvement scaled back.

Nomad has been supporting this family for a couple of years. Originally referred to the foodbank and for practical support with paperwork and grant applications. The family, parent and 6 children are under child protection. Nomad has worked alongside other services and has offered support to promote positive change through our parenting course and family focus sessions.

The parent has attended 1:1 parenting support sessions as well as attending our group parenting course, which has the benefit of sharing and receiving peer support from other parents with similar issues. Alongside this, Nomad have been seeing the children through mentoring and sibling group activities, allowing us to continue our family focus work, supporting both parents and children separately but then bringing the whole family together for activities and days out to spend time, assess and reflect on strategies offered through the parenting course and children's work.

The support is ongoing, but we have seen some positive changes with the parent and how they interact with their children, making positive choices, meeting the children's needs and importantly looking after themselves too.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Nomads aims and objectives embrace the Corporate Plan theme of Thriving and Healthy Communities, specifically helping to strengthen cohesion, reduce social isolation and tackle areas of deprivation. Many service users are disadvantaged and isolated economically and/or through the complex social issues they live with. This is often associated with generational cycles, which are hard to break out of and compounded by rural isolation where many services are difficult to access

We know that education is a key element in helping people to achieve their full potential. Many of the young people we support struggle with their learning and often not attending school, for many reasons often associated with chaotic home and lifestyles. Through the various programmes that Nomad delivers we can support many to achieve more than they expected, giving them a more positive view for their future, e.g.:

- Creating a safe environment for young people who cannot be managed within school setting to gain GCSE's in core subjects
- Taking a group of young people disaffected with school, to climb Mount Snowdon, built self-esteem

and confidence.

With many facing financial hardship, the community programme Nomad delivers enables many children, young people, families and individuals to participate in activities they would not normally be able to afford, and gives them a sense of inclusion as well as having fun, e.g.:

- Annual beach trip offers many their one day out of Henley each year and provides some unforgettable experiences at the seaside
- Community Fun Days in local parks brings communities together providing a feel-good factor and reducing isolation
- Providing activity days out for individual families and groups, that build positive memories and reduce isolation
- Help applying for grants from The John Hodges Charitable Trust for white goods which they would not ordinarily be able to purchase
- We also have a small helpfund funded by The Mosawi Foundation which enables us to support people with other issues. For example, purchasing of furniture for someone who was moving into independent living and didn't have anything. Taking a very vulnerable person to the dentist for the first time in 30 years and accompanying them to appointments (because of our support, they are now able to attend appointments independently), funding learning a musical instrument which helped with a young person's mental health.

These are quantifiable activities that can be evidenced through case studies and feedback from users and professionals.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

Nomad is continually exploring ways of collaborating and working in partnership with local organisations, both statutory and voluntary, businesses and anyone who can help promote the work to reach and support those most in need within the local community.

Within the statutory sector, regular information sharing meetings are held with local police, Henley Town Council and staff from schools that Nomad engages with. The outcome from these meetings helps shape service delivery. Participation of staff in one-to-one conversations and family meetings with social services, is also a factor in what we offer. EG Family days out, girls/boys residential.

Within the voluntary sector, Nomad has regular contact with the YMCA, CAB, CAP, John Hodges Trust, Henley Educational Charity, Mosawi Foundation, Riverside Counselling etc. These are all valuable contacts and widen our thinking in planning and strategizing in future development.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

As the numbers of interventions increases year on year, we are in no doubt that the services Nomad offers will be ongoing. Funding is always a challenge, and we have worked hard in recent years to see finances released from the local community alongside funding from established grant making bodies eg National Lottery.

With help from a local business man who is a member of the Nomad Advisory Board, we have established an annual dinner with a fund raising target of £15,000. Part of this is match funded by a corporation. This event has enabled us to contact several local trusts and philanthropists which in turn has released some funds. We plan to develop this further as each year new contacts are made.

We also have commitments from other local grant making trusts to further the work. E.g. Thamesfield and The Mosawi Foundation.

Having been the recipient of Lottery Grants for a number of years, we are currently in negotiation with them for a larger grant over 2/3 years.

Where it is appropriate, Nomad does charge for some services EG School Mentoring, but in most cases all services are free.

With a positive track record of funding the project year on year, Nomad is committed to maintaining that, providing for inflation and sustainable growth.

Does the organisation have a climate and nature policy/statement or action plan?

No

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

Nomad has worked hard to reduce our carbon emissions by concentrating on more local activities to reduce the need to travel, e.g. Nomad staff are qualified as standup paddle-boarders and regularly take groups on the river.

As well as creating a paperless office environment, many meetings are run electronically, again reducing the amount of travel.

All rubbish/waste is recycled, and we place an emphasis on helping our service users to do the same.

Makespace Oxford	Ref: SRev25-27/33
<p>Financial Review Officers have reviewed the last three years of accounts, reserves policy, funding forecast for 2025/2026 and 2026/2027 and budget for providing the services/activities over two years. The following applicant responses accompany the above documents provided, which were used to score the finance sections.</p>	
<p>Q1. If there is a shortfall in funding the services/activities described in your application, please tell us how you intend to cover all costs. This budget is only a portion of our business activity and the shortfall will be covered by budget surplus from other sites and operations, as well as increased grant funding. We have been developing a revised Theory of Change and funding strategy and are actively applying to a range of funds to maintain our financial resilience.</p>	
<p>Q1. Please describe how you will improve the financial stability of the organisation over the grant period and generally in the future. The following live initiatives are working to improve our financial stability in future:</p> <ul style="list-style-type: none"> • We are increasing our fundraising capacity, with a significant increase of focus on fundraising to support core costs and project activity over the coming few years. • We will continue to maintain a balanced portfolio of buildings ensuring a mix of larger and more stable income spaces can subsidise smaller and more challenging to operate spaces. • We have secured a 40-year lease on a new building in George Street, Oxford. This is a significant shift from our current portfolio where most properties have 5 years or less on their meanwhile leases. • We are changing our governance structure whereby Makespace Oxford CIC will be a subsidiary of a new entity, Makespace Oxford Community Benefit Society (CBS). The new CBS will allow us to raise funds via a community share offer and reduce costs by increasing our tax efficiency. 	
<p>Q2. Tell us in more detail if your finances have been affected by Covid19, cost of living or other factors, e.g. a drop in income resulting in a depletion of reserves below that of your reserves policy and/or a reduction in services. We provide support to our residents by offering affordable workspaces, business assistance, and the opportunity for community collaborations. The cost of living crisis over the past couple of years has financially impacted our buildings and residents, making it more challenging to cover costs of the hub spaces and keep rents affordable. We saw increased costs for the 'Meanwhile in Oxfordshire' project in a number of areas, which was our main delivery output from 2021-2023 (a £1.9m programme delivered on behalf of OxLep/Oxford City Council). We sustained losses via this programme which reduced our ability to begin building reserves.</p>	
<p>The Service(s) / Activities</p>	
<p>Responding to community need, consultation and inclusion</p>	
<p>Please describe the local need for the services/activities including how you identified this need for South Oxfordshire residents and how you have/will take a flexible approach to addressing ongoing community need. Makespace Oxford was commissioned in 2021 by OxLEP to lead the "Meanwhile in Oxfordshire..." programme to revitalise vacant urban spaces. This initiative aimed to foster a more equitable economic recovery by providing affordable, flexible workspace to emerging businesses, social enterprises, and community organisations.</p> <p>Through this programme Makespace received 124 applications from local organisations unable to find affordable space in South Oxfordshire. These applications detailed the types of spaces needed, the budget, activities, and sectors in which each organisation operates.</p> <p>Makespace identify local needs for its services and activities in the following ways:</p> <ul style="list-style-type: none"> • Number of applications or referrals received for space (via calls, emails, referrals, website enquiries and in-person conversations) • Number of organisations which contact us seeking space and/or community development support, 	

and/or social business development.

- Regular, direct feedback from Makespace residents and organisations hiring space (community meetings, 1:1 conversations and surveys)
- Feedback from individuals attending events hosted or co-hosted by Makespace Oxford.

Makespace has secured, renovated and reanimated two empty buildings in Didcot, alongside 24 other spaces across Oxfordshire. The Didcot spaces have collectively supported 20 organisations into permanent space and 27 community events in the past year. This has resulted in creating or supporting at least 30 local, Living Wage jobs.

Makespace offers affordable spaces at 40-80% of market value, tailored to each organisation's capacity and needs in dialogue with the organisation. Rates are set based on local market assessments and what an organisation can afford.

Makespace has been able to further reduce the cost of its Didcot spaces by providing 'rent support' via a National Lottery grant, removing the barrier of cost for groups starting-up and supporting the most vulnerable and South Oxfordshire residents.

Additionally, all spaces are fully accessible and maintained to high standards, in line with current Health and Safety standards and our EEDI commitments.

Beyond facilities management, Makespace plays a crucial role in community development. Regular resident meetings and one-on-one check-ins allow for open communication and address the needs of both occupiers and their beneficiaries. By actively listening to the community, Makespace can adapt its services to meet evolving requirements and foster a thriving, inclusive environment.

Finally, Makespace hosts or co-hosts events and programmes with its resident organisations to build their capacity, and directly support a wider number of South Oxfordshire residents. Examples of initiatives run so far include a film series, marketing training, Equality, Diversity and Inclusion training, wellbeing and self care sessions.

Makespace resident testimonial:

"The Junction is perfect for our needs and people always comment on how calming the space is - it has been fantastic to see some people with more complex needs coming to these sessions, who often get overwhelmed in group situations, and joining in and feeling relaxed. [Makespace] has been incredibly supportive and helpful throughout our journey so far, and the links and opportunities that we have had access to through the relationship with Makespace has opened up fantastic opportunities for people we support." - Style Acre

Please explain how your service users and other stakeholders/partners, where appropriate, have been consulted in service planning and delivery (including vulnerable/priority groups) and how they are involved in ongoing delivery.

At Makespace Oxford, we take a collaborative approach to service planning and delivery. Our model is about building relationships of mutual support and solidarity and ensuring we are always responsive to the needs of our residents. By actively involving residents in decision-making, we are able to create a more responsive, inclusive, and impactful working environment for the organisations and their diverse beneficiaries.

Consultation and Involvement

To ensure that our services meet the needs of our community, we engage with our residents and partners through various channels:

- **Regular Resident Meetings:** We hold bi-monthly resident meetings to discuss current issues, share updates, and gather feedback on our services. These meetings provide a platform for open dialogue and collaboration.
- **One-to-One Check-ins:** We conduct regular one-to-one check-ins with residents to address their specific needs and concerns. This personalised approach allows us to tailor our support to individual requirements.
- **Feedback Mechanisms:** We encourage feedback through various channels, including email, phone calls, annual feedback forms, and a dedicated feedback board. This enables us to continuously monitor and improve our services.

Involvement in Ongoing Service Delivery

Our residents are actively involved in the ongoing delivery of our services:

- **Co-Creation and Co-Delivery:** Our residents play a key role in co-creating and co-delivering support services, such as the design of new spaces through Community Advisory Boards, and our policies, for example, our Safer Spaces policy. This collaborative approach ensures that our interventions are relevant to, reflective of, and accessible to the community.
- **Accessibility and Inclusivity:** In response to resident feedback, we have taken steps to improve the accessibility of our spaces, including creating sensory kits, a multipurpose room, additional wheelchair-accessible ramps and growing spaces.
- **Tailored Support:** We offer a range of tailored support services, such as bespoke business support workshops, training sessions, and one-to-one business support meetings.
- **Community Building:** We foster a strong sense of community through events and initiatives that encourage collaboration and networking among residents.
- **Digital Innovation:** After requests for more connection between Makespace hubs in other parts of Oxfordshire from our Makespace community, we have developed (in close consultation) an online Resident Portal to facilitate communication, collaboration and resource-sharing between different Makespace hubs and partners.

Case Study - Resident Portal

The development of Makespace’s Resident Portal demonstrates our consultative approach to service delivery. Led by the Didcot Community Coordinator, this project involved collaboration with Deloitte (funder), a freelance web developer, Makespace’s Communications Manager, and Station Road Studios residents. Makespace used a collaborative feedback framework to engage residents at every stage, identifying key strengths and areas for improvement to ensure the portal met their needs. Regular hub space meetings included dedicated discussions and feedback. Upon completion, the platform—designed for collaboration and connection across hubs—was beta-tested by key residents before rolling out to all spaces.

Please provide details of how your Equalities policy/statement is implemented to ensure the organisation’s services/activities meet the needs of all users, including vulnerable/priority groups.

Please see attached files describing Makespace’s Commitments to Equity, Equality, Diversity and Inclusion. We are working to deepen our connection with our communities and remaking our commitment to equality, equity, diversity and inclusion in five important aspects of Makespace Oxford’s work:

- Dismantling institutional and structural racism
- Confronting social inequality
- Championing gender and sexuality equality
- Upending ableism and widening accessibility
- Meeting the ecological crisis.

Each area has an internal working group. Groups meet monthly to review plans and progress against each plan. We regularly consult with residents and partners to review our activities in order to ensure they are having the desired impact.

In addition, we have a monthly, all-team 'Racial Justice Reflection Session' which invites team members to share their lived experience, we share resources, reading and learnings, and reflect on these together. We do this to build our collective capacity and knowledge around issues of racial justice and, in particular, how systemic racism and racial injustices play out in the context of access to, and ownership of land, buildings and spaces.

We survey all residents regularly to gain feedback and conduct annual reviews of our progress against objectives.

You can read more about our work on this area at:

<https://medium.com/@andytransition/re-making-our-commitment-to-equity-equality-diversity-and-inclusion-in-2023-and-beyond-275de4f64e86> and <https://makespaceoxford.org/eedi/>

Please describe how you will know that you have been successful in meeting the needs of all users, including vulnerable/priority groups.

Makespace has a proven track record of supporting organisations to grow their impact over the past 6 years, documented in our 'Meanwhile in Oxfordshire Learning and Impact Report' attached. We regularly collect case studies and testimonials from resident organisations and their beneficiaries highlighting the positive impact of Makespace's interventions.

For example, resident organisations like Tribe Zero Waste, You Underwear, and New Grounds Coffee CIC began as small startups and have grown into thriving independent social businesses. In a 2023 survey, residents reported increased networking (80%), financial growth (40%), and team capacity (40%) due to their presence in our spaces and the support provided.

Our MEL (Monitoring, Evaluation and Learning) Framework utilises annual feedback forms, regular resident meetings, one to one sessions with residents and with building users to assess the success of our initiatives.

We are a learning organisation and consider this to be an ongoing and iterative process, where we can listen to feedback and improve our services and share our learnings with others. The Community Coordinator's engagement with residents organisations around issues that matter the most to their beneficiaries will ensure we centre the needs of the most 'vulnerable' groups whenever decisions are being made. This feedback is collected and recorded as part of our MEL framework, from 1:1 and group resident meetings, surveys from interviews.

Examples of areas we will monitor to ensure we are meeting the needs of vulnerable groups include:

- Percentage of groups (and their users) that consider our spaces welcoming and accessible
- Percentage of residents that consider our activities accessible and effective
- Feedback on the affordability of our spaces, events and activities
- Effectiveness of our Safer Space Policy
- Effectiveness of existing accessibility measures (virtual tours, adaptations, ramps, sensory kits)
- Additional accessibility measure that could be implemented.

Evidence of thriving communities within our buildings will be evidenced through live feedback processes and in depth interviews leading to at least 5 case studies per year exploring the impact Makespace has been able to have on organisations using the action research methodology of 'Most Significant Change'.

We will continue to prioritise applications for space and hires from community groups, charities, non-profits, artists and makers. We will target 70% of spaces utilised by 'vulnerable' groups, specifically those who have been historically marginalised or excluded from spaces, including people who identify as Black and People of Colour; part of the Global Majority, those living with a disability, identifying as LGBTQIA+, lower socio-economic status and other intersectionalities as described elsewhere in this application.

Direct community benefit and inclusion

How many people will benefit from the services/activities provided by this funding on average each year?
620

Please explain how you have determined the number of beneficiaries.

Makespace operates at several levels to create direct, immediate change to South Oxfordshire residents and also influences longer-term, systemic and transformative change.

Our direct and immediate impact is for those able to access space and resources who would otherwise have been unable or excluded from space. Principally we provide space for locally-rooted, purpose-driven community groups and enterprises who in turn support the residents of Oxfordshire. All our resident organisations deliver a positive social and/or environmental impact in their community.

We estimate, based on having six individual rentable spaces and 25 hiring organisations per annum with an average of 20 local South Oxfordshire residents attending each event, our interventions would benefit at least 620 residents per year.

Although by no means exhaustive, some of our current residents have also shared with us their own beneficiary numbers based on their own work. Without the spaces and support offered by Makespace, these groups would not be able to operate, or would have the possible scope of their impact restricted.

Oxfordshire Discovery College: Supports 75 young people in South Oxfordshire through its hub space at Station Road Studios.

Style Acre: Supports 275 adults with learning disabilities across Oxfordshire. They have 350 employees (the majority of which are frontline support workers).

Kings Church: Has 200 regular unique attendees to services held at the Junction.

Sabali Pots: Supports 52 people per year with a mix of regular attendees and unique events. XXXX:: 50 attendees annually to events and workshops, works with over 100 local residents.

Please describe who will directly benefit from your services/activities.

Makespace exists to widen access to space and resources for communities systemically and historically excluded from space and experiencing disadvantage. This is an approach towards 'spatial justice' - the belief that everyone has the right to safe, secure, affordable and beautiful spaces in which to work, meet, organise, create and develop a sense of belonging.

We are acutely aware that access to space, cultural opportunities and resources is impacted by socio-economic status, race, ability, educational attainment, gender and a number of other protected characteristics. As a result, we prioritise our support and spaces for groups directly supporting 'vulnerable' residents (as defined by this fund).

At this moment, 63% of our permanent residents and those who access our spaces for activities, events and programmes in our Didcot spaces support local 'vulnerable' or 'priority' citizens. Through support from this grant, which will provide us with greater community development capacity, we aim to increase this number to 70% of residents and space users.

Organisations currently housed in our Didcot spaces and the groups they support include:

- Oxford Discovery College works with young people who have difficulty with their mental health, as well as their friends and family, and with the professionals who are working to support them. XXXX is an artist, art facilitator, and trained mindfulness teacher who works with people to prioritise mental health.
- Style Acre works with people with learning disabilities and autism.
- South Oxfordshire Muslim Association is an established safe space and integrated presence for the Muslim youth community in Didcot.
- King's Church Didcot is a community faith group where half the congregation is under the age of 18, with a strong children's programme and youth group.

The kind of programmes, events and activities run by our community development team would help contribute to the support for 'vulnerable' groups as defined by this fund.

Examples of the activities and free events we have run, which are open to the whole community and in some cases including free hot meals and bursaries for travel and compensation for time, include:

- International women's day celebration events (supporting women, queer, and non-binary residents).
- Educational speaker events and workshops for black, global majority and working class artists and creatives.
- Social enterprise business support mentoring sessions, coaching and advice for groups trying to access space (for groups looking to establish a new initiatives supporting local vulnerable residents).
- Community meet-ups (specifically welcoming residents local to hubs, residents of Soha's social housing, such as the elderly and unemployed, tackling social isolation).

These are examples of events we have run previously and could be run again, subject to demand and consultation with local residents.

The wider Makespace network includes organisations working with global majority-led groups, economically disadvantaged, young people, isolated people and those with disabilities and mental health needs.

We have supported over 205 organisations across Oxfordshire to access affordable space over the past 6 years. 54% of these organisations support residents groups who have been systematically disadvantaged or marginalised (based on socio-economic status and protected characteristics).

Please describe how the services/activities that you are requesting funding for complements council

services, and/or indirectly reduces the likelihood of needing support from the council.

Makespace actively complements and contributes to local council's work and ambitions in a variety of ways:

- Inclusive economic development and supporting strategic economic plans

We have created or supported over 300 local Living Wage jobs, enabled over £2m of inward local investment, helping to contribute towards the County's Strategic Economic Plan (SEP). Specific benefits are generated around 'Strengthening our communities locally', ensuring the benefits of growth are captured locally and sustainably, enabling diverse communities to thrive.

- Community support services and facilities

Makespace provides spaces, resources and infrastructure that complements other core services provided by local county and district councils. We complement other forms of social infrastructure, such as libraries, social services, adult learning, childrens and young people services and community centres in partnership with our resident organisations and through the activities and programmes we run.

- Supporting South Oxfordshire's VCSE sector

Supporting Oxfordshire's VCSE Sector Strategy and vision to enable a strong, diverse and vibrant voluntary and community sector, to help deliver positive change for our communities. This is made possible through the space and resources accessed by our resident organisations, 90% from the VCSE sector. Our community development team supports the council's commitments on collaboration and networking, capacity and skills development.

- Action on climate change

Makespace supports the county's ambitions to become carbon neutral by 2030. We do this through the reuse of empty buildings, reducing demand for new buildings and removing the waste and embodied carbon associated. Makespace also conducts a range of ecological practices (growing spaces, 100% renewable energy, promoting the circular and reuse economies).

- Equality, diversity and inclusion

Makespace supports and complements the councils 'Including Everyone' Equalities, Diversity and Inclusion Framework. We do this through supporting groups focused on ED&I, increasing the accessibility of our buildings and actively engaging with residents around their needs.

- Community wealth building

Makespace is committed to Community Wealth Building (CWB) practices. It is a founding partner and active member of 'Owned by Oxford', a collaborative CWB initiative focused on supporting Global Majority and working class businesses across Oxfordshire. We are actively engaging with the county council CWB Officer and Senior Leaders, to support the delivery of its CWB objectives.

Case study:

Makespace worked closely with the South and Vale Arts Officer and Economic Development Officer in the South Abingdon Arts and Culture Project to unlock the skills and knowledge of artists and community groups in the area.

"South Abingdon Arts Project is playing an important role in delivering education, training and skills for local people and young people, particularly young people who may not be in education, training and employment (NEET). By engaging with young people through art and culture and nurturing their creative talent, the South Abingdon Arts Project is working collaboratively to help reduce the local NEETs Gap for marginalised young people. This exciting and dynamic project is co-creating with local youth an employment resource which supports young people having fair access to good quality jobs." XXXX, co-founder of Oxford Community Action.

Emerging Corporate Plan priorities, outcomes and collaborations

Emerging Corporate Plan contribution:

Thriving and healthy communities

What achievable outcomes for residents are you expecting as a result of the services/activities that you are requesting funding for?

Although the outcomes of Makespace’s work reflects all of the council’s Corporate Plan themes, for the purpose of this application we are responding to how our services will provide better outcomes in the community for Inclusion, Accessibility and Accountability.

1. More organisations are able to access space within our existing buildings, and access their own spaces in South Oxfordshire, via our support and training.

Residents who would like to access the service/activities are able to do so (specifically, accessing affordable community and work space, and community development support).

We aim to provide space and support to at least 620 South Oxfordshire residents who participate in activities hosted or co-hosted by Makespace’s Community Development Coordinator and resident organisations.

2. Residents are satisfied with the services/activities they receive.

80% resident satisfaction from annual surveys, event feedback, and bi-monthly meetings.

3. Increased number of vulnerable residents are able to access space and support, enhancing a sense of belonging and reducing social isolation amongst vulnerable/priority groups.

At least 60% of space users from underserved and vulnerable groups (e.g. global majority, women-led, LGBTQ+, etc).

Documented impact of community and business development in five case studies collected annually to showcase Makespace’s influence on residents and the South Oxfordshire community.

4. Facilities are well used, generating good value for money.

Hub spaces are operating at minimum 75% capacity as a proportion of space and time available, tracked by the Makespace team. Rent for space is on average between 30-80% Market Value, benchmarked annual through local market surveys.

5. Build the capacity of Makespace residents and wider local resident community responding to need Minimum six events run annually across Makespace’s core themes: (i) accessing and managing space (ii) practical tips for developing purpose-driven organisations, (iii) community events, tackling social isolation, and (iv) learning spaces, exploring ideas and theories for systemic change.

6. Makespace builds its financial resilience/sustainability.

Creation of a fundraising plan that meets the aims of the organisation and is regularly monitored, revised and updated.

7. Makespace is accountable for reducing its environmental impact and influences its resident organisations to reduce their impact and increase their ambitions around environmental sustainability and collaborating on climate action.

An annual summary of activities taken against our commitments will be published. An annual survey of residents will capture any impact Makespace has had on their activities.

Example testimonial from a Makespace resident at the Junction:

"I've really appreciated how you've welcomed us all at The Junction – as I think I've mentioned before, it has been the nicest and best run of any of the many community facilities we've used over the years." - XXXX, Kings Church Didcot.

Please tell us how you do or will work in partnership/collaborate with others to design and/or deliver the services/activities that you are requesting funding for.

In South Oxfordshire, a key partnership has been with Soha Housing, the landlord of Station Road Studios and The Junction (see reference attached). Within these buildings, through our collaboration with Soha, we renovated and reanimated 60% of their office spaces, which had become empty and disused following

COVID-19. This partnership enabled Makespace to utilise parts of SOHA's vacant areas under a shared vision to support purpose-led, grassroots and nonprofit organisations in delivering vital community activities and services.

We also view each of the residents who occupy space within the buildings as collaborators. The dedicated community coordinator proactively builds relationships based on mutual support and solidarity, responding to residents' needs. Within this partnership, we aim to upskill the Makespace resident organisations and South Oxfordshire residents through training opportunities and co-led events to build capacity and resources.

Makespace also works in partnership with Oxfordshire Social Enterprise Partnership (OSEP). In 2025 we will deliver a tailored programme for organisations in South Oxfordshire and the Vale of White Horse (supported by UKSPF, led by OSEP in partnership with, Cooperative Futures, Aspire Oxfordshire, Soha Housing, and African Families in the UK). This programme aims to expand our support for the wider social enterprise sector beyond those we engage with around our physical spaces. Over six months, the programme seeks to share resources and provide dedicated support to promote healthy, vibrant communities and reduce social isolation.

Across other hub spaces outside of South Oxfordshire, we have trialled different methods of working in partnership with local communities and resident organisations.

This has included:

- Creating community advisory groups to guide how we design community-use spaces.
- Leading a community arts programme that explores how creative expression can be used as a tool for positive social change.
- Changing our legal structure to become a cooperative benefit society where, in the future, we hope to have members as decision-makers within our legal governance.

Please outline your plans/ideas of how you will continue to develop your service in collaboration with others to become more financially sustainable in the future.

Makespace's work necessitates balancing the needs of our residents with our own sustainability. We aim to make our work financially sustainable, ensuring we can continue to serve the community in the long term. We believe we are best placed to do this work, and to support Oxfordshire community organisations into space and access the resources they need to thrive. Our primary commitment, however, is to make sure these spaces are accessible and affordable for the local community groups who rely on it. Balancing this financial need with our community mission is a core challenge in our work.

Regular building costs and day-to-day expenses such as service charges, rates, regular maintenance and facilities staff salaries can be sustained through rental income from 80% or lower market rates. Although the day-to-day management of the buildings is a sustainable financial model, the additional support and collaborative engagement with the resident community and their beneficiaries by our Community Development Coordinators require additional financial support. We believe that the value of this work is vital to creating the positive impact needed to build thriving, healthy communities for all that prioritises inclusion, accessibility and active citizenship.

We are committed to expanding our impact by open sourcing our learning, resources and knowledge. We are actively fundraising and seeking investment to create toolkits, training and consultancy offers that can enable more organisations to take on space for themselves, building towards increased community ownership locally.

Our long term ambition is to create a change in the narrative and mindset around space: to put people, places and the living world above profit. We are working in coalition with a network of over 30 groups in towns and cities across the country via Platform Places (<https://www.platformplaces.com/>) and other emerging networks. Together we are working towards long term systemic change to democratise ownership and re-imagine urban regeneration and access to space. We believe this work underpins some of the core inequalities and social challenges we experience in Oxfordshire and beyond.

Does the organisation have a climate and nature policy/statement or action plan?

Yes

Please describe what your organisation has already achieved towards decarbonising its operations and promoting nature recovery.

- Maintaining our commitment to repurposing and reusing building, spaces and materials - the most

ecological building is the one that already exists.

- Across all meanwhile spaces we prioritise installing furniture, fittings, energy systems and upgrades which are modular and can be de-installed for reuse in future meanwhile spaces.
- We seek opportunities to carry out energy efficiency improvements and low energy retrofits in all new projects.
- All buildings powered by 100% renewable electricity wherever we have control of the utilities.
- We are exploring growing food and greening spaces for ecological health in all buildings with outdoor or green spaces.
- We are supporting organisations committed to tackling the climate emergency, sustainable food, and building the circular economy with technical support and affordable spaces.