

Appendix Three

Nomad Youth & Community Project		Ref	SRev\23
Core costs to deliver Nomad Youth & Community Services			
Delivering targeted activities/programmes to disadvantaged young people and families in the local community.			
Total cost (over four years)	£536,989	Amount requested (over four years)	£80,000
Previous grants: Revenue grant for core running costs 2013/14 – 2016/17 £100,000 (£25,000 / year) Revenue grant for core running costs 2008/9 - 2012/13 £127,500 (£25,500/year) Revenue grant for core costs 2007/8 and earlier – amounts unknown.			

District ward areas covered:

Sonning Common, Woodcote & Rotherfield, Henley-on-Thames

SCORING

Does the grant reduce each year?		
The request reduces year on year over the four-year period.	Score	1/2
Long term financial plan		
The organisations four-year financial plan is comprehensive and achievable.	Score	2/2
Do they have at least one year's running costs in reserve?		
The organisation holds £23,000 in reserve, which is in line with its reserves policy.	Score	1/2
Have they covered their costs for the last two years?		
The organisation has made small surpluses in 2015 and 2016.	Score	2/2
What are their other funding sources?		
The organisation has identified considerable opportunities for future funding but none of it appears to be guaranteed.	Score	1/2
Evidence of local need		
Equality officer: There is strong evidence of local need (suggested score - 2 points). Community Safety Team Leader: Strong evidence of a local need (suggested score 2 points). Grants officer: In 2015-16 over 100 individual children supported and 79 individual parents.	Score	2/2
Working with our corporate priorities		
Equality officer: The service offers high levels of contribution to our equality objectives (suggested score - 2 points). Participation Officer: The application meets thriving communities policies in the corporate plan and looks to provide positive activities for young people, as well as providing a family targeted approach to numerous families in need (suggested score - 2 points). Community Safety Team Leader: High levels of a contribution to thriving communities and reflecting resident's needs (suggested score - 2 points). Grants Officer: This service contributes well to three actions within our 'thriving communities' objective. It also offers some contribution to our equality objective around delivering better outcomes for disadvantaged groups.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		

The organisation has provided a volunteer policy and currently has 18 regular volunteers.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Equality officer: There is significant evidence that this is a strong solution to the need (suggested score - 2 points). Community Safety Team Leader: There is evidence that this service is the best solution to the needs identified (suggested score - 2 points).	Score	2/2
How well do other agencies / council staff support the service this organisation provides?		
Equality officer: Strong support for this service (suggested score - 2 points). Community Safety Team Leader: Strong support for the service and organisation (suggested score - 2 points).	Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		
The targets are reasonable and show an increase on current service outputs.	Score	2/2
How achievable/reasonable is their project delivery/development plan?		
The project plan is comprehensive and appears deliverable.	Score	2/2
What is the funding for (continuing, expanding existing services or launching a new service)?		
The funding will help the organisation to continue to operate and increase the number of beneficiaries.	Score	1/2
Total score	24/26	Recommended Grant
		£80,000

Applicant responses

<p>How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?</p>	<p>Our own records and statistics show the need for this project. In the year 2015/16 we made a total of 4775 interventions. This included supporting 103 individual children and young people and 79 individual parents. Feedback from service users show that many of them value our services and support even when we cannot always solve their problems, the advice, guidance and sign posting we provide is helpful. Many of them express that there is no other organisation or body helping them. One parent who attended a Parenting Course stated that more than anything she needed a place to download her frustrations. Another lady who joins our annual day trip to the beach every year has said, "This is my holiday. I can't afford to go away and the day at the beach is great. We have come every year since you have been doing it and the children look forward to going to the sea so much"</p> <p>Our services are wide and varied and have evolved and developed out of the needs that have come to our attention. Service users often do not know where else to go and encourage their friends to contact us too.</p> <p>We have established good working relationships with a range of agencies including Social Services, Child & Adolescent Mental Health, local GP's, Health Visitors, local Police, Turning Point (Harm Minimisation Service), Gillotts School and local primary schools, CAB, YMCA Housing , South & Vale Housing, SOHA, Green Square Housing Association, Connections Floating Support and Town Council. Our ability to act as a bridge in linking in and signposting vulnerable often hard to reach people, with the specialised services has proved valuable and effective, with many professionals endorsing our work. The Head Teacher of Gillotts School, a local Police officer a Social Worker from the South Oxfordshire Social Care Team and a Town Councillor all sit on our Board in recognition of that.</p> <p>Deprivation and disadvantage are hard to quantify in a small rural town like Henley especially as there is a high level of wealth, but for those who do fall into that category, it is very isolating. Accessing the services they need can be a confusing business and service users welcome the support they receive from us in that process. Many of the agencies tell us they welcome our input in helping people to engage more positively with them. See attached reports from Tesco, CAMHS, Social Care, local schools.</p> <p>Oxfordshire Indicators for deprivation, workless households, people on benefits and other types of disadvantage show that the need in Henley and surrounding areas are low. However for the children and young people who are defined by one or more of those categories, the isolation and disadvantage can be greater as they live alongside such wealth.</p> <p>We have not undertaken any official consultation but can provide evidence from service users and professional partners of the benefit of our work and the need for it to continue.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Due to our long standing work in the community Nomad has amassed a wealth of local knowledge about the families and family and social dynamics within the community. This has proved to be a vital component, time and again in helping families to engage positively with the services they need. Proportionally there are high levels of domestic abuse and children on child protection plans or the subject of a children in need plans. Working in partnership with local schools, social services, local police, CAB, YMCA there is a recognition that Nomad is well placed to support these families at grass roots level. Nomad workers are often invited by the statutory services to participate in professional meetings as they recognise our ability to engage positively with the vulnerable children, young people and families.</p> <p>Many families have been long term residents in the town and hardly know a world outside of the town they live in. Having a service such as Nomad that is situated within their reach, provides a psychological security for them that then allows us to act as a bridge to enable them to reach the services they need. We do not replace these services but work effectively alongside them.</p>

<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Nomad is willing to support any young person, parent or family requiring support within our brief and aims. If we are unable to help we will endeavour to sign post to an agency who can.</p> <p>We anticipate supporting at least 100 young people annually with intensive support through one 2 one mentoring, small peer learning/activities groups activities and engaging them in positive activities through after school and holiday programmes. These YP will be presenting with challenging behaviour, failing in school, at risk of substance misuse and other negative behaviours and at risk of being involved in the criminal justice system.</p> <p>Through our wider community work we would anticipate engaging with at least a further 150 young people each year.</p> <p>In addition we would provide intensive support to at least 40 parents each year through one 2 one and group parenting training and Family Focus sessions. In the wider community context we anticipate engaging with at least a further 120 families through community activities and the Food Bank distribution. Dysfunctional families not only impact their own lives but frequently impact negatively on the wider community they live in. Supporting families to make positive changes and thrive will benefit the community.</p>
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Applicant's financial forecast - Nomad Youth & Community Project

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this			£4,414	£4,659	£5,083	£5,311
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including					
	Training and development (all staff and volunteers)	£1,200	£1,300	£1,400	£1,500	£1,500
	Expenses	1200	£1,200	£1,400	£1,500	£1,600
	Agency fees and other related employment costs					
	Staff Mobile phone costs	550	550	550	575	575
	Project Manager Salary including oncosts/annual	40445	41657	42907	44194	45520
	Youth & Family Support Worker + on costs FT	27434	31011	31941	32900	33887
	Youth & Family Support Worker + on costs 30 hrs per week	22252	25145	25899	26676	27477
Family Support & Funding Coordinator 15 hours per week	11125	£12,572	£12,949	£13,337	£13,737	
Building costs	Rent/mortgage	£5,700	£5,700	£5,700	£5,700	£5,700
	Business rates					
	Gas					
	Water					
	Electricity					
	Gas/water/electric inclusive	£1,150	£1,150	£1,300	£1,300	£1,400
Services	Total					
	Waste collection/disposal	£420	£420	£420	£420	£420
	TV license/packages					
	Wi-Fi/broadband					
	Phone Line					
	Building maintenance	£300	£300	£300	£300	£300
	Cleaning	£1,000	£1,000	£1,000	£1,000	£1,000
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
	Wifi/phone line inclusive	£420	£420	£420	£420	£420
Pest Control	£110	£110	£110	£110	£110	
Supplies, equipment and consumables	Stationery and postage					
	ICT development					
	Meetings costs (conference rooms, catering etc etc)					
	Publicity and marketing (design, print and photocopying)					
	Furniture, equipment and maintenance					
	stationary/postage/design/print/photocopying inclusive	£1,200	£1,200	£1,200	£1,300	£1,300
Professional costs	Building Insurance	£540	£550	£560	£570	£580
	Trustee Insurance					
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc	£2,730	£2,750	£2,800	£2,850	£2,920
	Public Liability/Trustee Insurance inclusive	£1,400	£1,400	£1,500	£1,500	£1,600
Other costs	Youth & Families Project Costs	£27,000	£26,000	£26,000	£26,000	£26,000
	Community Activities and Programmes costs					
Total Expenditure (B)		£119,176	£128,435	£132,356	£136,152	£140,046
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if	£8,000	£8,000	£8,000	£8,000	£8,000
	Contracted services from local authorities and other	£25,000	£24,000	£22,000	£19,000	£15,000
Donations, grants and fundraising	Grants from local councils, agencies, government bodies	£23,000	£23,000	£23,000	£23,000	£23,000
	Grants from philanthropic foundations/organisations	£52,000	£55,000	£58,000	£62,000	£66,000
	Fundraising income from community / events	£10,000	£12,000	£14,000	£15,500	£18,000
	Other donations	£5,000	£6,000	£7,000	£8,000	£9,500
Other income	Income from interest on reserves, endowment funds etc	£90	£80	£80	£80	£80
	Gift Aid	£500	£600	£700	£800	£900
Total Income (C)		£123,590	£128,680	£132,780	£136,380	£140,480
Balances at year end (i.e. line A - line B + line		£4,414	£4,659	£5,083	£5,311	£5,745

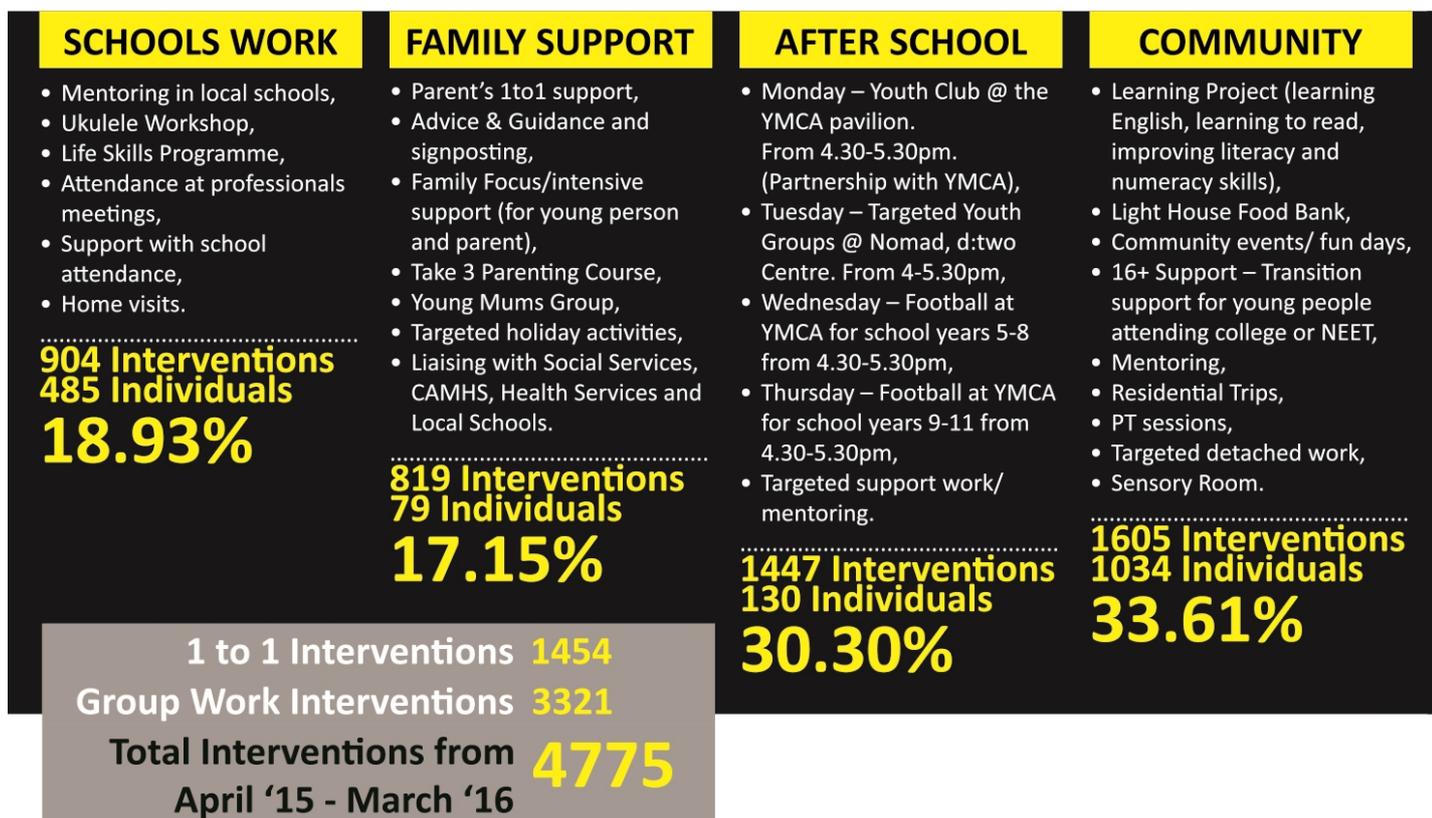
Applicant's project delivery/development plan - Nomad Youth & Community Project

Nomad Business Plan – 2017 - 2021

Nomad is a detached youth and community project which has evolved in the town of Henley on Thames to provide a wide and increasing range of services to the local community. Its aims are to

- Support and assist young people and families in Henley and its surrounding areas, particularly those who are, marginalized through social and economic factors?
- Help them to make good and informed choices in all aspects of their lives and in particular the areas of education, health, training, employment, finances, independence, recreation and relationships.
- Encourage people to be full and useful members of our local community and society as a whole by working with them and other appropriate agencies to improve the conditions of their lives including their physical, mental, and spiritual capacities.

WHAT DOES NOMAD DO?



Nomad has a robust Equalities and Diversity Policy which promotes the principle that all people have value and endeavours to ensure that services are accessible to all regardless of social class, ethnicity, age, sexual orientation, gender and religion and as such we seek to serve them in a way that is expressed in our ethos. Nomad is also committed to ensuring the safety of all service users and in that context has regularly revised policies and procedures in Safeguarding and Health and Safety. The safety and care of staff is also of paramount importance and all policies pertain to their welfare too.

The services delivered by Nomad in the local community are divided into 4 key elements shown here in the diagram.

This business plan defines the current work and explores potential development of that work in the context of disadvantaged children, young people and families within the community of Henley on Thames and surrounding area. The services are designed to address the issues that categorise people as disadvantaged including low self-esteem and confidence, lack of aspiration and entrenched mind-sets, offering hope to enable them to make positive life style choices and changes.

Nomad defines disadvantage within this community as those children, young people and adults recognised as being on or living within a low income environment and where there is marginalisation through emotional poverty and complex social needs which can cross the class and income range.

The Nomad Team consists of the Project Manager working full time, 1 full time Youth and Family Support Worker, 1 Youth & Family Support Worker providing 30 hours of work, one Family Support Worker providing 15 hours of work. We consider this to be a suitable number of staff to work and support the volume of need within the community.

Between them the team deliver initiatives for children, young people and their parents/carers that are vital in breaking down generational cycles of negative patterns and behaviour. Programmes to support young people in their own right and similarly for parents continue, but in addition Nomad is further committed to delivering and developing programmes for the whole family in both formal and informal ways.

The 4 Key Elements of Nomad Provision:

These key elements provide the opportunity to work with whole family units both for the benefit of individual children, young people and families but in a wider sense to benefit the whole community. The services outlined in each key element will and do stand alone but they are also intrinsically linked. Recent evaluations and outcomes show that there are more positive changes when the elements are linked. The following is a brief synopsis of the four areas we intend to continue and develop and which are outlined above.

Element 1 - Schools Work:

This involves Nomad workers going into local schools. It offers a weekly Mentoring program for referred students around issues that might include anti/unacceptable behaviour, poor attendance, relationship difficulties, poor organisational skills, low self-esteem and confidence. Some students will also be at risk of sexual exploitation and abusing substances. The programme now includes mentoring some students in years 5 & 6 who are still in primary school. This enables identified students to receive support as they transition through to secondary school. An 8 week Life Skills programme is delivered to a group of between 6 and 10 year 8 students identified by the school. The programme tackles areas of communication, handling anger, self-esteem, organisation, relationships and drugs and alcohol awareness.

These programmes enable Nomad workers to build a relationship with these young people after which they may be invited to link in with afterschool and holiday programmes. This also opens a door to meet parent/s and if appropriate they are invited to join a parenting support group or receive one to one support. With both male and female youth & family support workers we are able to provide mentoring for both boys and girls.

School feedback on these programmes continue to show a marked drop in negative incidents within school for the majority of referred students, an increase in attendance for those struggling in this area and improved relationships with parents. The head teacher of Gillotts School in Henley sits on the Nomad Advisory Board and her Assistant Head, Matt Druce and Head Teacher Jacky Steele of Badgemore Primary School have both provided testimonials in support of Nomad's work.

In the period 2017 - 2021 Nomad will continue this programme and seek to increase the capacity to engage with more young people. We will look to develop the mentoring programme into further primary Schools in Henley as the need arises and overall would look for positive outcomes in the area of school attendance, achievement and a drop in the number of negative incidents recorded against each student.

Key Element 2 - After School Programme:

This includes:

- **1 After School Club** based as the YMCA facility in Henley and engages with young people in years 5 – 7 on a weekly basis. It provides diversionary/fun activities and offers support through the transition from primary to secondary school. Topical issues around substance misuse, relationships, acceptable behaviour, healthy eating will be tackled appropriately within the context of the programme.
- **2 Nomad Football weekly sessions** using sport as a diversionary activity and to teach life skills.
- **Peer Support Groups meet once a week** – there are a number of these groups forming from girls and boys groups to need related groups.
- **Holiday Activity Program** for targeted young people including trips, games sessions for peer groups and one to one.

This element is closely linked with our work in schools enabling us to build on the relationships with young people developed there and then taken out into the community. The programs are designed to be enjoyable, develop team work and camaraderie and divert them from more negative behaviours.

Links with parents and families are also further enhanced helping to build bridges with school and other statutory agencies who might be involved.

This programme brings us into contact with on average, 60 young people each week and on an annual basis at least 130 individual young people. In the period 2017 - 2021 we would like to sustain that level, continue building relationships with them supporting them in making positive life choices for their futures as they move forward. We are very mindful that some young people are either misusing substances or living in families where other members are abusing substances. We will intentionally develop work to support those young people and their families as needed.

Key Element 3 – Family Support

This includes:

1. Family Focus Workshops & Joint Family Initiatives:

Targeted young people and their parents are invited to join a series of bespoke workshops designed for individual family units addressing the pertinent issues affecting them. Topics

covered include communication, handling anger, personal and family organisation, relationships and importance of boundaries and consequences.

2. **Take Three Parenting Course** – re designed in four week blocks with each session lasting 2 hours. Groups can cater for up to 12 participants and running them in 2 X 4 week blocks enables parents to commit more easily. The programme offers strategies and tools to help understand stages of adolescence, styles of parents, listening skills, negotiating and setting of boundaries with appropriate consequences. This programme also enables parents to learn from and support each other and encourages parent self-care.
3. **One to One Parenting Support** – this offers parents with particularly challenging situations specific and tailored support on an individual basis.
4. **Young Mums Group** - this project has developed from our work in other settings, with young parents who are identified as being vulnerable and disadvantaged. Some of them have well established relationships with us from previous involvement and others are referred via health or social services. It provides a safe environment for them to come on a weekly basis with their babies/toddlers for positive play experiences, opportunities to discuss life issues affecting them and their children and to encourage them in planning for their futures. For those wanting to move on there is a close link with the Education Project, Money Management programme and training in budgeting and cooking affordable, healthy meals. Some of these parents having struggled with issues of substance misuse, anti-social behaviour etc. This project provides opportunities to support them in breaking those cycles of generational behaviour.

In the period 2017 - 2021 we aim to develop the group by linking in more of the existing parents with the Learning Project and life skills training and encouraging others to join via health visitors/social workers and significantly from recommendations from the current users.

Families are referred to these programmes, by schools, social services, Early Intervention Service, CAMHS and through self-referral. Family Focus Workshops have proved to be a very effective means of working with families to see significant change in areas of school attendance, parental relationship with the schools and more settled home environments. The families also enjoy trips and fun activities on completion of the workshops as an incentive and as a team building/bonding exercise.

In the 2017 - 2021 we aim to develop the Nomad family Support Programmes to make them more available to other families and increase the subject matter for Workshops. We would also like to see parents linking in with all three programmes so that none stands in isolation from the other. They are all intentionally targeted at strengthening family relationships and anticipated outcomes will see parents more empowered to be parents, more peaceful home environments and improved relationships with their child's school teachers and other professionals. Happier homes will produce happier children who are more able to learn and achieve effectively, with fewer incidents of anti-social behaviour in school and the wider community.

Key Element 4 – Community

1. **The Learning Project** provides bespoke individual learning programmes for young people 16+ and adults in the area of literacy, numeracy and other skills based courses including Manual Handling, Health & Hygiene and First Aid in the Workplace. Using qualified tutors we are able to support students in achieving levels 1 & 2 in English and Maths. Those with poor or no reading

skills will learn to read and support can also be offered to parents for whom English is not their first language. Nomad support for young people 16+ who have fallen out of the education system aims to help build self-esteem and confidence, improve their CV's, source volunteer placements and help with job searching thus raising their aspirations for further training and employment. See Case Study.

Engaging adults in positive learning experiences also increases their self-esteem and confidence which improves their chances of employment. It also impacts on their children's learning and begins to break down generational cycles of underachievement.

In the period 2017 - 2021 we aim to build on the small successes, developing a new training opportunity in basic IT skills and responding to individuals needs in order for them to achieve their potentials.

2. Light House Food Bank provides between 25 & 30 food parcels each month increasing to at least 130 over the Christmas period. Referrals come from CAB, housing providers, social services, health services, local police, Nomad directly and some self-referrals. There is a clear need for this service at local level and it also provides a platform for other support to be offered through money management and budgeting programmes. There is a growing ownership within the local community for the Food Bank with food donations being made on a regular basis from local churches, individuals and local food retail outlets. We have established a partnership with Tesco Henley through their Fair Share Scheme and will work to develop that further. This is a valuable resource that provides practical support for many of the families supported by Nomad in other ways.

In the period 2017 - 2021 we aim to be more intentional in supporting those who receive food parcels with the issues that put them in this position and increasingly build links with other community groups, organisations and businesses to support the project. We will work in collaboration with Henley CAB and Henley Lions Club to develop a Winter Fuel initiative that will support local families struggling to pay their fuel bills.

3. Community events/fun days:

These are planned throughout the year to take place during school holidays and are delivered in targeted areas across the community for local people. Locations include Freemans Meadow, Henley YMCA community facility and Makins Recreation Ground. We partner with other organisations including Henley Town Council, SOHA, Green Square, YMCA, Gainsborough Residents Association and Adventure Plus, to create memorable occasions in micro communities where there is recognised disadvantage.

An annual trip to the beach takes place every August providing a day at the seaside for up to 130 children, young people and adults. This has become a popular event and for many the only day out of Henley each year. In addition Hobbs Boats enable Nomad to invite up to 60 children, young people and parents on an annual river trip at no charge.

In 2016/17 we aim to continue this programme, looking for new ways to build community cohesion. We aim to engage more local residents in the planning and implementation of these events. In order to make these activities more sustainable we will be actively sourcing sponsorship and local funding streams.

5. 16+ support for young people at risk of being NEET

This engages with young people who have fallen out of the education system prematurely and provides openings for continued learning in English and Maths. It will facilitate further training/employment and sourcing and supporting voluntary placements.

In the last 12 month period we have supported a number of young people aged 16+ who have fallen out of the education system. 2 have secured work, and others have been volunteering. (See Case Study)

In the period 2017-2021 we aim to build on the existing work and increase the number of young people we reach. This is a very vulnerable group who easily slip through the net. We aim to develop a programme of inspirational residential trips aimed at raising self-confidence, independence and aspirations.

6. Targeted Detached Work

Nomad workers are committed to meeting young people on their 'own turf' going out into those areas where youngsters are known to congregate. Due to capacity this work is often seasonal and takes place at identified times. This can include Nomad workers provide a detached presence during the lunch break at Gillotts School, in local parks and other areas where young people are known to congregate. This enables us to meet young people informally and invite them to participate in our organised activities.

In the period 2017-2021 we aim to continue this work and look to partner with volunteers and other organisations EG: Street Pastors, local Police.

Substance Misuse:

Nomad recognises that the misuse of substances is a major factor in many of the interventions it makes each year. In approximately 45% of the interventions made each year there is a direct involvement, they live with a family member or there is family history involving a substance (drugs/alcohol) misuse. This often results in negative behaviours, low achievement and in some cases criminalisation. Much of our one to one support of both young people and parents seeks to address this issue and where appropriate we signpost to specific services for expert support.

All the programmes that Nomad delivers contain an element to inform and discourage the abusing of substances. It is an area that we are constantly reviewing and together with the evidence we collect it will shape any services we develop. Nomad is committed to equipping its staff with regular updates and training in the area of substance misuse.

Evaluation:

Nomad is committed to evaluating its service on a regular basis for the purposes of:

- Hearing from the service users to help ensure that we are meeting their needs and providing a quality service
- Informing the Nomad staff of the effectiveness of programmes and activities and amending them accordingly where appropriate
- Providing feedback to funders and prospective funders of positive and negative outcomes

We will use a simple evaluation tool which has been tailored to the various activities and programmes that we run. Service users are requested to rate themselves at the beginning of a programme and again at the end. This enables us to measure in particular soft outcomes and provide additional support accordingly.

Working with young people and parents whose lives are often chaotic and in crisis does pose challenges as at those moments many are not receptive to completing a questionnaire, however simple. So it is not possible to follow this process with everyone. Many of the challenges that our service users face are not dealt with through short term programmes. They require long term support which Nomad is well placed to offer, working at grass roots level and embedded in the local community.

Feedback from schools, other professional bodies and verbal feedback from service users is recorded and helps form part of the evaluation process. In addition Nomad writes regular Case Studies. These stories provide real evidence of change and work in progress.

Budget for period 2017 – 2021 and Funding:

With many grants and donations being made for a 12 month period or as one offs, it is hard to project where future income will come from. However Nomad has been fortunate to develop a positive track record of fundraising over 20 years and will work hard to continue that process in order to secure the services for future generations of children, young people and families in Henley and district.

The estimated annual income of between 124K and 141K indicates the continual need to fund raise. During this period Nomad will continue to develop its policy to find funding within and through the local community. There is evidence of growing links with local grant making trusts, local businesses, clubs and individuals which are proving beneficial and in this period we would look to extend and develop those links. (See further policy on collaborative working). These include Henley Educational Trust, Turners Court Youth Trust, Thamesfield Youth Trust, Henley Town Council, The Mosawi Foundation, Invesco Perpetual, Ward Consultancy and small project sponsorship from Hobbs Boats, Knight Frank, Ballards, SOHA and Greensquare Housing Associations. Nomad also acts as a conduit for funds to be directed to individuals and families to purchase household items and access training courses. This is done through our links with John Hodges Trust, Henley Lions Club and the Face of Henley.

Grant funding from South Oxfordshire District Council and SODC Community Safety Partnership have contributed greatly to our sustainability over the years. We do not take that funding for granted but equally we do not underestimate the challenge to replace it. Grant applications, fund raising approaches and initiatives will continue. A Funding Group made up of local business men who have pledged time to explore funding within the local community are supporting us. We will be looking to develop this group and add in new members as appropriate. So together there is a real commitment amongst staff, the Nomad Trustees and Advisory Board to see the project thrive and continue for future generations.

(Please see separate Budget Sheets for 2017 – 2021)

NB: With regards to money held in reserves, Nomad has a Reserves Policy set by the Trustees to retain sufficient funds to cover at least three months salaries. In 2016 we managed to achieve that level of reserves. Work will continue to build on that.

Collaborative and Partnership Working:

These are fundamental elements in our continued work. With firm relationships already established with Gillotts School, Badgemore Primary School, Social Services, Thames Valley Police, Henley Town Council, SODC, Job Centre, Housing Associations, Tesco Henley, Henley YMCA and CAB we are well placed to develop our collaborative working.

Nomad receives referrals from these bodies and organisations and many of them will provide testimonies to the value and need for our work. We will continue to meet regularly with these bodies to discuss how we can mutually improve our partnerships. (See Testimonial Examples)

There is also evidence of considerable collaborative working with the professional bodies and organisations mentioned within our Budget and Funding Section above.

In addition to these bodies Nomad is exploring collaborative working with further groups and organisations to ascertain how we can work together to achieve better outcomes and lasting positive change for children, young people and families in the community. These include Henley Rowing Club, Riverside Counselling Service and A2 Dominion Housing Group. The former two organisations are locally based and following preliminary discussions we have agreed to meet to explore ways of working together to benefit our service users. The latter provides advice and guidance around Domestic Abuse. We are aware of the increase in reported incidents of this nature at local level and it is an issue that we are regularly confronted with. To have a direct working relationship with a front line service will be hugely beneficial to our service users.

Volunteers:

Nomad has a strong volunteer policy and welcomes volunteer help and support in the running of the project both on a regular and occasional basis. We will continue this and seek to develop it to provide further opportunities. (See Volunteer Policy) Nomad is particularly keen to work with service users who have benefited from our support and want to give something back. Providing them with volunteer placements is another part of their journey in rehabilitating themselves from a very negative place to one of hope and expectation for the future.

In Conclusion:

Nomad values its charity/voluntary sector status and believes that by working in partnership with statutory organisations and other community groups it can continue to:

- Provide an excellent service and value for money
- Be flexible in its approach
- Engage positively and successfully with those often defined as hard to reach.
- Breakdown real and perceived barriers between service users and statutory organisations

Supporting and encouraging children, young people and families; whose life experiences often conspire against them; to thrive is a singular aim. This plan outlines some of the ways and methods we will use to do that. It is a journey we will take with our service users helping them to make good life choices that will impact their behaviour, health, self-esteem and confidence, employment and career prospects, their family, work, relationships within the community and their ability and desire to give back to others.

The targets we have for the period 2017 – 2021 will require considerable work and it is not Nomad alone that can achieve them. We are grateful for all the support given both financial and in time and interest and we look forward to the future with anticipation.

Style Acre	Ref	SRev\25
Didcot Day Service - We are applying for funding for our day service hub for adults with learning disabilities in Didcot, which has 73 regular attendees.		
Total cost (over four years)	£29,467,267	Amount requested (over four years) £66,000
Previous grants: No previous grants		

District ward areas covered:
Didcot North East

Scoring

Does the grant reduce each year?		Score	2/2
The grant reduces considerably from year one at £22,000 to year four at £10,000.			
Long term financial plan		Score	2/2
A comprehensive financial plan has been provided based on costs for the organisation as a whole, which operates predominantly in South Oxfordshire but does extend up to Banbury.			
Do they have at least one year's running costs in reserve?		Score	1/2
The organisation's reserves are in line with their reserves policy.			
Have they covered their costs for the last two years?		Score	1/2
In 2016 expenditure exceeded income by £77,881, however their general fund of £1,036,671 covered this loss. In 2015 a loss of £62,607 was recorded.			
What are their other funding sources?		Score	1/2
They have identified sources of funding for over £6 million (towards their wider costs, not just this service), some of which is from local authority contracts.			
Evidence of local need		Score	2/2
Equality officer: There is strong evidence of local need (suggested score 2 points).			
Grants officer: Oxfordshire's Learning Disability Strategy 2015-18 identifies need in Didcot for the services that this organisation provides.			
Working with our corporate priorities		Score	2/2 (counts as 4 points as weighted scores)
Equality officer: The service offers high levels of contribution to our equality objectives (suggested score 2 points).			
Grants officer: The service contributes to our 'thriving communities' priority and our 'equality' objective around delivering better outcomes for disadvantaged.			
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		Score	2/2
The organisation has a volunteering policy and has 30 regular volunteers. In 2015-16 they recorded 6,845 volunteer hours.			
What evidence is there that their service is the best solution to the need identified?		Score	2/2
Equality officer: This is a very strong solution to meet the need identified (suggested score 2 points).			
Grants Officer: The organisation has a proven track record of providing this service and meeting the identified need. This is proven by the referrals and support they receive from other agencies.			
How well do other agencies / council staff support the service this organisation provides?		Score	2/2
Equality officer: Strongly supports this service (suggested score 2 points).			

Grants officer: Referrals from social services, occupational therapists and health professionals are provided.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets appear relatively low for the demand in South Oxfordshire.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
An excellent project and delivery plan was provided.		Score	2/2
What is the funding for?			
The funding will enable the organisation to continue to operate and increase the number of beneficiaries in South Oxfordshire.		Score	1/2
Total score	23/26	Recommended Grant	£66,000

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

The Government's three year strategy for people with learning disabilities - Valuing People Now (2009) had the following message at its heart: that people with learning disabilities should be able to lead ordinary lives, like everyone else. People with learning disabilities want to go to college, get a job, make friends, have relationships and enjoy a social life, just like anyone else. They sometimes need a bit more support than others to achieve this. This is what our Didcot day service is doing - providing support to learning disabled adults so that they can 'have a life' in the same way as everyone else. With the introduction of personal budgets, individuals now have more control over the type of service they buy but unfortunately, sometimes have less money to do so. Some individuals with mild to moderate disabilities have found that their personal budgets have been cut and as a result won't buy much; this was one of the factors behind the creation of our day service. Our flexibility enables beneficiaries to purchase more and find activities which are affordable. As a drop-in centre they can access as much or as little as they want; ranging from low-cost drop in facilities, information, advice and guidance to paid sessions and activities with or without support as necessary.

The Government white paper - Valuing People (2001) stated: "People with learning disabilities are amongst the most vulnerable and excluded in our society. Very few have jobs, live in their own homes or have choice over who cares for them. This needs to change: people with learning disabilities must no longer be marginalised or excluded." Our day service directly addresses this need to change - we support people to make their own choices about how they spend their time, we support them to develop skills, look for work placements and to get involved in the community through regular activities and events.

The Big Plan - Oxfordshire's Learning Disability Strategy 2015-2018 has four overall priorities. We are meeting two priorities directly in Didcot - the priority of enabling people with learning disabilities to have more choice and control over their lives and the priority to enable people with learning disabilities to take an active part in their community, through work, volunteering, friendships, and other opportunities.

The Didcot service started as we were getting referrals for people needing support who we did not have opportunities for and there was nowhere to signpost them to. Following discussions with social services care managers about this gap, we opened in 2012 with 13 service users. We now have 73 service users, demand is strong and growing - reflecting the need for a service of this nature. Oxfordshire County Council recently warned of the 'devastating impact' of further proposed funding cuts to services. Areas affected are to include adult social care. The need for flexible affordable support has never been greater. Our internal evaluation of the service shows that people are benefitting from attendance at our service.

Why is your service is the best solution to meet this need?

Our service's flexibility and affordability is why we are best suited to meet the needs identified for adults with learning disabilities and autism. Our days service's drop in nature means people we support can choose daily the support they require. They can choose to sign up for supported activities or choose to drop in and join activities, or simply meet friends or use the computers. They are not committed to paying for services leaving them free to pursue other opportunities that may arise for them at any given time, similarly we are open if any activity they have planned falls through, they still have somewhere to go that day. We offer a safe place to meet and receive advice and guidance. Our service offers adults with milder learning disabilities and autism the chance to meet their peers and develop their own social lives and access work and voluntary placement opportunities. Style Acre is best suited to meet this need as we have

	<p>experience of delivering personalised support and delivering activities to suit a wide range of people. We monitor our services and carry out regular satisfactions surveys. The people we support are involved in developing our activities.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Primary beneficiaries of the project include:</p> <ul style="list-style-type: none"> - adults with learning disabilities and autism who benefit from access to a wide range of activities and support - families and carers of adults with learning disabilities who benefit from some respite and seeing their loved ones leading a more meaningful life - project staff who benefit from employment and comprehensive skills training in the field of learning disability, communication, signing, autism etc - volunteers who benefit from skills development, career exploration, personal growth, socialising (making new friends and networks) and making a difference to their local community.

Applicant's financial forecast - Style Acre

		2016/17	2017/18	2018/19	2019/20	2020-21
Budget for Style Acre - Didcot Day Service Hub (only)						
Balance at start of year (A) (include savings and reserves in this			£0	£0	£0	£0
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)	£167,215	£169,723	£172,269	£174,853	£177,476
	Training and development (all staff and volunteers)	£1,448	£1,491	£1,536	£1,567	£1,598
	Expenses	£7,944	£8,182	£8,428	£8,596	£8,768
	Agency fees and other related employment costs		£0	£0	£0	£0
	Staff costs - new catering activity		£5,700	£8,120	£12,363	£17,777
Building costs	Rent/mortgage	£25,320	£29,976	£29,976	£29,976	£29,976
	Business rates	£2,883	£2,969	£3,059	£3,120	£3,182
	Gas		£0	£0	£0	£0
	Water		£0	£0	£0	£0
	Electricity		£0	£0	£0	£0
	Service charge - new lease agreement		£3,090	£3,183	£3,246	£3,311
Services	Total		£0	£0	£0	£0
	Waste collection/disposal	£1,916	£1,973	£2,033	£2,073	£2,115
	TV license/packages		£0	£0	£0	£0
	Wi-Fi/broadband		£0	£0	£0	£0
	Phone Line	£2,299	£2,368	£2,439	£2,488	£2,538
	Building maintenance	£1,500	£1,545	£1,591	£1,623	£1,656
	Cleaning	£1,103	£1,136	£1,170	£1,194	£1,217
	Alarm/Emergency lighting maintenance		£0	£0	£0	£0
	Legal Costs for staff contracts etc	£2,074	£2,136	£2,200	£2,244	£2,289
	Window cleaning/land scaping		£0	£0	£0	£0
	Stationery and postage	£1,128	£1,162	£1,197	£1,221	£1,245
Supplies, equipment and consumables	ICT development	£2,490	£2,565	£2,642	£2,694	£2,748
	Meetings costs (conference rooms, catering etc)	£0	£0	£0	£0	£0
	Publicity and marketing (design, print and photocopying)	£364	£375	£386	£394	£402
	Furniture, equipment and maintenance	£817	£842	£867	£884	£902
	Drop in Centre Activities related costs	£17,791	£18,325	£18,874	£19,252	£19,637
	Consumable costs - new catering activity		£2,800	£4,120	£6,304	£9,109
	Health & safety supplies	£1,301	£1,340	£1,380	£1,408	£1,436
Professional costs	Building Insurance		£0	£0	£0	£0
	Trustee Insurance		£0	£0	£0	£0
	Public/Employee Liability & Personal Accident		£0	£0	£0	£0
	Professional fees (accountants, legal, HR etc)	£748	£770	£794	£809	£826
	Insurance (allocated cost)	£920	£948	£976	£996	£1,015
Other costs	Service costs - motor vehicles used to transport use	£7,856	£8,092	£8,334	£8,501	£8,671
	Allocated central overheads not specified above	£37,694	£38,825	£39,990	£40,789	£41,605
	Total Expenditure (B)	£284,811	£306,333	£315,564	£326,595	£339,499
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)					
	Contracted services from local authorities and other organisations					
	Drop-in Centre User Income	£260,929	£263,538	£267,194	£272,957	£278,808
	Income - new catering activity (product sales)		£10,000	£16,160	£24,482	£35,030
	Income - new catering activity (training courses)		£0	£2,525	£3,570	£5,152
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU					
	Grants from philanthropic					
	Fundraising income from community f events					
	Other donations					
Other income	Income from interest on reserves, endowment funds etc					
	Internal subsidy/Service specific grants	£23,882	£32,795	£29,685	£25,586	£20,509
	Total Income (C)	£284,811	£306,333	£315,564	£326,595	£339,499
	Balances at year end (i.e. line A - line B +	£0	£0	£0	£0	£0

Applicant's project delivery/development plan - Style Acre

Style Acre - Didcot Day Service Hub Project Delivery and Development Plan 2017-2021

Introduction

Style Acre is a charity working exclusively within Oxfordshire providing support and services for people with learning disabilities and autism. We believe that our local focus and charitable status gives a unique position within Oxfordshire. Over the last 20 years we have developed a strong presence in South Oxfordshire and a reputation for quality, values and bespoke person centred support. We have developed a range of supported living services that have enabled people to choose where and who they live with. We have developed day opportunities that provide people with creative, meaningful and outcome focused ways to spend their time and learn key skills. We have also developed three social enterprises that raise our profile and enable people we support to gain work experience at the heart of the community they live in – a charity shop, tearoom and book shop.

We are currently in the most challenging financial position the social care and charity sector has ever faced. Public services are facing unprecedented challenges and funding will continue to be placed under significant pressure as demand for services will almost certainly increase, as a result of local and national demographic changes. There have been significant OCC budget cuts of £70 million in 2016/17 with no sign that the position is going to improve in the short to medium term. Style Acre's services are outlined below:

Supported living – we provide comfortable homes with committed carers for 96 adults in Didcot, Wallingford, Banbury, Wheatley, Wantage, Henley, Witney and Oxford. Style Acre is registered with the Care Quality Commission (CQC) and is an approved provider with Oxfordshire County Council.

Day service opportunities – we have day service hubs in Wallingford, Didcot and Banbury, and a shared garden space in Wantage. Our hubs offer a wide range of social, leisure and educational activities for 191 adults with learning disabilities and autism. We need funding to subsidise the costs of running our day service hubs – covering the shortfall when costs of providing our services are not covered by service-users' payments. We also raise funds for delivering specific projects aimed at increasing skills and independence and enhancing the well-being of the people we support.

Work Programme – we have staff dedicated to supporting people into voluntary and work placements at our own tearoom, charity shop and bookshop or with local companies.

Communication and Technology for Independence – we ensure those people we support with communication difficulties can communicate as effectively as possible, through assessment, diagnosis and intervention. We ensure the people we support have access to technologies that will enhance their lives and increase their independence.

Community involvement – we encourage people we support to take part in community activities. We organise social events for the people we support and activities such as sport, arts and gardening.

Didcot Day Service – Project Delivery

The Didcot day service hub - known as T2 - was set up in early 2012 to meet the needs of significant numbers of adults with mild to moderate learning disabilities who were unable to access affordable appropriate day support, as local authorities concentrated resources on those with critical needs. The project will continue to deliver its



set

and

core

services outlined below between 2017 and 2021 and will also continue to develop innovative ways and new services for the people we support.

The Government's three year strategy for people with learning disabilities, set out in 2009 (Valuing People Now), has the following key message at its heart: that people with learning disabilities should be able to lead ordinary lives, like everyone else. People with learning disabilities want to go to college, get a job, make friends, have relationships and enjoy a social life, just as much as anyone else - they just need a bit more support than others to achieve this. This is exactly what T2 provides; support, so that adults with learning disabilities can 'have a life' in the same way as everyone else.

With the introduction of personal budgets individuals now have much more control over the type of service they want to buy but sometimes less money to do so. We are finding that individuals with mild to moderate disabilities are seeing cuts in their personal budgets meaning a reduction in their spending power; this was one of the driving factors behind the creation of T2. The flexibility of T2 enables beneficiaries to purchase more and find affordable activities. As a drop-in centre they can access as much or as little as they want; ranging from information, advice and guidance to paid sessions and activities with or without support as necessary.

T2 is a vibrant, lively community supporting adults from early 20's to people in their 60's; there is something for everyone here - including walking and cycling groups, photography, performing arts, karate club, yoga, pottery, computer skills, a men's group, games and much more. Many people are keen to enter the world of work or volunteering and we support their journey through our Work Programme. There are opportunities to volunteer and become part of the local [community](#). *Training for Independence* is an important aspect of the service and considers topics including healthy eating, shopping, cooking skills, budgeting and travel training - vital, as many people aspire to travel independently to the day service, to work and socially. The core hours of the service are 9:00am - 4:00pm Monday to Friday; however, outside of these hours we continue to support people to other community events or activities, such as nightclubs, sporting events, theatre and gigs. Our walking group regularly meet at weekends and have gone away for overnight trips.

The Day Service is funded through service-user payments, donations and gifts in kind. The running costs are not all covered by service user payments, the balance comes from donations, grants for specific activities or from surpluses generated from our supported living activities as an internal subsidy. Style Acre has a small fundraising team who raise funds primarily from individuals, events, trusts & foundations and community groups.

T2 sets out to achieve the following outcomes:

- Provide work and volunteering opportunities for adults with learning disabilities
- Develop and improve the life skills of adults with learning disabilities
- Raise levels of confidence and independence in adults with learning disabilities
- Develop social confidence and build social networks to enable adults with learning disabilities to become more active members of their local community

Assessments on 56 beneficiaries in 2014 revealed that since the Didcot Day Service opened:

- 77% of beneficiaries showed improvements in confidence levels with 22% showing marked or significant improvement
- 78% of beneficiaries showed improvements in communication skills with 8% showing a marked or significant improvement
- 97% of beneficiaries showed improvements in their ability to make and keep friends with 38% showing a marked or significant improvement
- 79% of beneficiaries showed improvements in their social skills with 16% showing a marked or significant improvement
- 79% of beneficiaries showed improvements in their levels of independence with 9% showing a significant or marked improvement

In a survey carried out amongst our service-users, 67% indicated that they were satisfied with the service on offer to the extent that they felt there was nothing we could do better. Ninety-

five percent said they felt more confident and happier, whilst 100% said that they felt more independent.

In the current environment of cuts to adult social care budgets, the services we provide for those compromised by the cuts is now more important than ever. An evaluation of the Didcot Day Service is attached with our application for your information.

Development Plan for 2017 – 2021

Our strategy is to continue to do what we have successfully done over recent years:

- To listen to what our community needs, to work collaboratively to develop and deliver services that support people’s needs and aspirations, to have an absolute focus on the quality of everything we do.
- To work to achieve our charitable objects.
- To maintain our focus and delivery on a mix of supported living, day opportunities and social enterprises / retail opportunities ensuring the overall blend is both financially viable and meets people’s needs.
- T2 will continue to offer its vital every day services to adults with learning disabilities and autism.
- We plan to develop a new social enterprise and increase our collaborative working with other local organisations.

Fundraised income from trusts & foundations means that in early 2017 we will be installing a new training kitchen at T2. This will enable us to deliver *Training for Independence* sessions such as cookery classes, food hygiene, grocery shopping and meal preparation and planning. We will also be leasing extra rooms to give us more space to operate. It will also enable us to start a new catering business run by the people we support in Didcot.

Style Acre currently runs a tearoom in Blewbury (the cakes are baked at our existing training kitchen in Wallingford by people we support). We run charity shop in Wallingford and bookshop in Banbury. These social enterprises provide voluntary and work placements for people we support. Our Work Programme finds and supports people in placements in local businesses. We have experience of setting up and running social enterprises for people we support and have found that they are an excellent stepping-stone into further work in the community.

Our new catering enterprise will focus on producing food to order - sandwiches, quiches and cakes for delivery to events, businesses and individuals. We have been preparing for this through a group learning project about business development at T2 whereby the people we support have set up a tuck shop business. The people we support will learn about business development and with support, they will devise the business plan for the new catering enterprise.

Timescale	Development Plan
Year 1	<ul style="list-style-type: none"> • Use new training kitchen to produce cakes and quiches for the tea room at Blewbury • Train people we support in cookery skills, food hygiene, stock management and budgeting in preparation for Year 2 • Support 12 people into new voluntary or work placements • Support 50 people to attend activities in the local community • Support 70 people to attend social and leisure activities • Support 20 people to feel more independent • Support 30 people to feel more supported and able to cope • Support 70 people to attend the service • Design a bespoke catering training course • Staff and volunteer training to support catering enterprise • We will work collaboratively with local self advocacy charity My Life My Choice
Year 2	<ul style="list-style-type: none"> • Use training kitchen to produce cakes and quiches for the tea room at Blewbury • Use training kitchen to make sandwiches and food to order for delivery to local businesses • Support 12 people into new voluntary or work placements

	<ul style="list-style-type: none"> • Support 50 people to attend activities in the local community • Support 70 people to attend social and leisure activities • Support 20 people to feel more independent • Support 30 people to feel more supported and able to cope • Support 70 people to attend the service • Deliver bespoke catering training course for 6 people (to include training in the kitchen, food hygiene, money management, tea room placement, catering enterprise placement) • We will seek to work collaboratively with local education and training providers • We will continue to work collaboratively with My Life My Choice
Year 3	<ul style="list-style-type: none"> • Use training kitchen to produce cakes and quiches for the tea room at Blewbury • Use training kitchen to make sandwiches and food to order for delivery to local businesses • Use training kitchen to expand the food to order catering service to include a small scale 'meals on wheels' type befriending service for older people • Support 12 people into new voluntary or work placements • Support 50 people to attend activities in the local community • Support 70 people to attend social and leisure activities • Support 20 people to feel more independent • Support 30 people to feel more supported and able to cope • Support 70 people to attend the service • Deliver bespoke catering training course for 6 people • We will seek to work collaboratively with Age Concern
Year 4	<ul style="list-style-type: none"> • Use training kitchen to produce cakes and quiches for the tea room at Blewbury • Use training kitchen to make sandwiches and food to order for delivery to local businesses • Use training kitchen to expand the food to order catering service to include a small scale 'meals on wheels' type befriending service for older people • Support 12 people into new voluntary or work placements • Support 50 people to attend activities in the local community • Support 70 people to attend social and leisure activities • Support 20 people to feel more independent • Support 30 people to feel more supported and able to cope • Support 70 people to attend the service • Deliver bespoke catering training course for 6 people • We will seek to work collaboratively with Age Concern

Budget for Didcot Day Service

Style Acre has a large supported living provision that provides carers for adults with learning disabilities and autism. We support a wide range of people from those with severe complex needs who require round the clock 1:1 care to those with milder disabilities who require less support.

In the financial year ending March 2016 Style Acre's total income was £5,520,679. Total expenditure was £5,701,803. Of this £4,195,553 was supported living income, £4,205,222 was supported living expenditure. Our total reserves amounted to £1,766,615 of which £1,036,736 is our general funds, maintained at a level that will sustain the charity for approximately two months.

Funding cuts mean we are seeing a greater pressure on the personal budgets of new referrals and existing people we support. Style Acre needs to 'fill the gap' in some of these areas to ensure there is no detriment to the people we support. Our Day Services, Work Programme and other support services are added value services that enable Style Acre to offer a truly person centred approach and enhance the quality of life of those we support. Funding for these services comes from service-user payments and fundraising. The cost of providing our Didcot Day Service Hub over the next four years is detailed below. A full budget template for the Didcot hub has also been completed and is attached with our application.

Expenditure £	Year 1	Year 2	Year 3	Year 4
Salaries/related costs	176,914	181,925	188,783	196,831
Premises costs	43,057	43,451	43,720	43,995
Transport and expenses	16,274	16,762	17,097	17,439
Professional fees	3,854	3,970	4,047	4,130
Equipment and consumables	27,034	29,080	31,763	35,077
Marketing and PR	375	386	394	402
Other / miscellaneous	38,825	39,990	40,789	41,603
Total	306,333	315,564	326,595	339,499
Income				
Service-user payments	263,538	267,194	272,957	278,808
SODC revenue grant	22,000	19,000	15,000	10,000
New income from social enterprise	10,000	16,160	24,482	35,030
New income from catering training course fees	0	2,525	3,570	5,152
Internal subsidy	10,795	10,685	10,586	10,509
Total	306,333	315,564	326,595	339,499

Monitoring

T2 provides reports on the numbers of attendees and on the various activities undertaken. It also measures softer outcomes such as: how life has changed as a result of attending the service and in what way (improved self-esteem and confidence, improved life and social skills, greater pride in their appearance, a reason to get out of bed etc.). We will collect stories and case studies of the people we support and their achievement, carry out satisfaction surveys to ensure we maintain quality and monitor the number of people supported and hours of support provided. We keep track of referrals and requests from families through word of mouth recommendation and monitor complaints and compliments.

Conclusion

T2 will continue to deliver flexible support to adults with learning disabilities. We will also develop a new catering enterprise to provide work and voluntary placements for the people we support and to generate income to support the day service. We are a forward- looking organisation and are keen to work collaboratively with other social care providers to meet the needs of the local community.

We will maintain and enhance our reputation as a high quality, community focused and trusted partner to develop and create exciting opportunities and will develop new partnerships that bring added-

Fish Volunteer Centre		Ref	SRev\17
To employ an office manager for their volunteer centre, which offers a range of support services and community transport scheme for residents in Sonning Common and the surrounding villages.			
Total cost (over four years)	£149,060	Amount requested (over four years)	£12,000
Previous grants: No previous grants			

District ward areas covered:

Kidmore End & Whitchurch, Sonning Common, Woodcote & Rotherfield

Scoring

Does the grant reduce each year?		
The grant reduces each year over the grant period without reducing services.	Score	2/2
Long term financial plan		
Their four-year financial plan appears reasonable and achievable.	Score	2/2
Do they have at least one year's running costs in reserve?		
Yes - the organisation has reserves of £54,000 at 1 January 2016. This includes a sinking fund to purchase a new minibus.	Score	2/2
Have they covered their costs for the last two years?		
The organisation made small surpluses in 2014 (£5,541) and 2015 (£10,814).	Score	2/2
What are their other funding sources?		
Some funding is relatively secure, such as the contribution from Oxfordshire County Council from the current bus pass scheme.	Score	1/2
Evidence of local need		
Corporate Projects Officer: There is a clear need for this service based on the evidence provided (suggested score 2 points).	Score	2/2
Grants Officer: The organisation states that during the period 9 October 2015 to 8 October 2016 there were: 197 return bus journeys (local shopping trips), 1996 passengers were carried 7123 miles.		
Working with our corporate priorities		
Corporate Projects Officer: The service offers a high level of contribution to our priority 'services that reflect our resident's needs' in this specific part of the district (suggested score 1 point - due to the limited area covered).	Score	1/2 (counts as 2 points as weighted scores)
Grants officer: This service offers some contribution to the thriving communities' priority and one of our equality objectives.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
Corporate Projects Officer: While they have not provided a formal volunteering policy they use high numbers of volunteers to run their service and encourage volunteering (suggested score 1 point).	Score	1/2
Grants Officer: If they do not have a volunteering policy in place we strongly recommend adopting one and suggest we considering making any award conditional on this.		
What evidence is there that their service is the best solution to the need identified?		
Corporate Projects Officer: They are already established so are a strong solution to the need and do link with county-wide organisations for support in transport (suggested score 2 points).	Score	2/2
How well do other agencies / council staff support the service this organisation		

provides?			
They provided letters of support from Kidmore End Parish Council, Sonning Common Health Club and Lunch Club a local health specialist and Community First Oxfordshire.		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The proposed targets are reasonable and achievable.		Score	2/2
How achievable/reasonable is their project delivery/development plan?			
The project plan is reasonable and appears to be achievable.		Score	2/2
What is the funding for?			
The funding will allow the organisation to continue and improve its service and increase the number of beneficiaries.		Score	1/2
Total score	23/26	Recommended Grant	£12,000

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>We are very active in the community and are constantly requested to help but are informed, at times, of the difficulty the public have in communicating with our office due to the out of date office system. This has also been stated by the health centre and parish councils.</p> <p>In order to address the current situation, and bearing in mind a substantial increase in population by 2020, it has been decided to implement a new office system using IT and a permanent part time office worker.</p>
Why is your service is the best solution to meet this need?	<p>Due to the long and very successful history of FISH we are widely known in our area of operation.</p> <p>We enjoy a good working relationship with all our stakeholders and despite at times problems in our office with regard to bookings we have a high success rate of meeting the needs of our clients</p> <p>In our current accommodation we enjoy a good size office and community room with kitchen and toilet. We have identified a need for the community room which is used by: A visiting podiatrist, a group of Carers as a respite area. End of life sessions organised by the health Centre.(These sessions are for clients with disabilities), Management meetings.</p> <p>We know the Community that we serve and again have identified a considerable number of lonely elderly clients. Over the last 5 months we have started a befriending service where one of our volunteers ,who has training in Social Welfare organises visits. The volunteer doing the visiting is matched with like interests with our client and this initiative has been very well received and we see this progressing in the future.</p>
Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)	<p>The elderly, infirm disabled and lonely in the whole community. Currently FISH has in the region of 400 regular clients.</p> <p>This includes arrangements for volunteer drivers to pick up and transport to hospitals, dentists, clinics, health centres. In addition, we make arrangements for taking relatives to hospitals and care homes to visit families and loved ones.</p> <p>We also have developed a befriending service where home visits are arranged by a qualified volunteer for those who are housebound and are lonely. This service was introduced some six months ago and currently the numbers of weekly visits made is approximately ten with a forecast that this will increase substantially over the period of this grant application.</p> <p>Other services that we provide are picking up prescriptions and other provisions for those unable to do that for themselves.</p> <p>On a monthly basis, we organise a tea party open for all where regularly we will provide refreshments and entertainment for 40-65 people. For those unable to make their own way, we provide a pick-up service by private car and minibus.</p> <p>The FISH community room is being used more and more by groups needing a free and inviting environment. These include carer and craft groups.</p>

Applicant's financial forecast - Fish Volunteer Centre

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£54,000	£59,380	£56,190	£54,600	£54,060
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)		£10,000	£10,000	£8,000	£6,000
	Training and development (all staff and volunteers)		£1,000			
	Expenses	3900	3900	4000	4100	4200
	Agency fees and other related employment costs					
Building costs	Rent/mortgage	£5,000	£5,000	£5,000	£5,000	£5,000
	Business rates	£580	£1,100	£1,100	£1,100	£1,100
	Gas					
	Water					
	Electricity	£400	£450	£450	£450	£450
Services	Total					
	Waste collection/disposal					
	TV license/packages					
	Wi-Fi/broadband	£500	£550	£550	£550	£550
	Phone Line					
	Building maintenance					
	Cleaning	£500	£500	£500	£500	£500
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
Supplies, equipment and consumables	Stationery and postage	£50	£50	£50	£50	£50
	ICT development					
	Meetings costs (conference rooms, catering etc etc)	£1,200	£1,200	£1,200	£1,200	£1,200
	Publicity and marketing (design, print and photocopying)	£2,900	£2,900	£2,900	£2,900	£2,900
	Furniture, equipment and maintenance	£650	£650	£650	£650	£650
	Bus service, repair and fuel	£4,200	£4,250	£4,300	£4,350	£4,400
Professional costs	Building Insurance	£600	£600	£600	£600	£600
	Trustee Insurance	£240	£240	£240	£240	£240
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc)		£2,000	£1,000	£500	£500
	Bus Tax Insurance	£900	£900	£900	£900	£900
Other costs	Fund for a replacement minibus	£5,000	£5,000	£5,000	£5,000	£5,000
	Total Expenditure (B)	£26,620	£40,290	£38,440	£36,090	£34,240
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)	£3,550	£3,550	£3,700	£3,900	£4,200
	Contracted services from local authorities and other organisations					
	Bus Fares	£5,500	£5,500	£5,800	£6,000	£6,200
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£1,000	£6,000	£5,000	£3,000	£2,000
	Grants from philanthropic foundations/organisations	£1,100	£1,100	£1,100	£1,100	£1,100
	Fundraising income from community / events	£11,000	£11,100	£11,300	£11,500	£11,600
	Other donations	£9,000	£9,000	£9,100	£9,200	£9,300
Other income	Income from interest on reserves, endowment funds etc	£500	£500	£500	£500	£500
	Fuel Rebate	£350	£350	£350	£350	£350
Total Income (C)		£32,000	£37,100	£36,850	£35,550	£35,250
Balances at year end (i.e. line A - line B + line C)		£59,380	£56,190	£54,600	£54,060	£55,070

Applicant's project delivery/development plan - Fish Volunteer Centre

Project delivery and development plans.

FISH was started in 1978 by Ann Butler Smith and was known as the Good Neighbours Scheme which soon became known as the Sonning Common FISH Volunteer Centre.

The organisation developed having its office in the village hall.

In 1985 FISH was asked to incorporate the running of the SCOPE minibus and since then the organisation has had a dual role in organising both a very successful programme for the minibus plus a growing demand for the use of volunteer car drivers.

We have seen over the years the development of local villages and the Sonning Common Health Centre which serves this enhanced Community. FISH has expanded its area of activity in line with this development in South Oxfordshire and covers such villages as Sonning Common, Rotherfield Peppard, Kidmore End, Dunsden, and Binfield Heath. Currently we are looking at the need to expand this area which we see as essential in an ageing community.

We work in a collaborative way with such Parish Councils extending this way of working with Caversham Good Neighbours (CGN) and the Wantage Citizen Advice using Best Practice.

The introduction of a new computer system for booking clients appointments is being done in a collaborative way with CGN in using their experience. We shall build our plans on the CGN experience over the last four years and already have our lists of required information for such a system. This development is necessary due to the increasing workload in our office.

Recruitment of a permanent part time member of staff will be managed by Mary Norris who is our office manager and who, before retirement, had her own recruitment business.

Over the years we have worked with ORCC (now Community First Oxfordshire) with regard to many topics including ongoing funding.

We enjoy the networking support as part of the 60+community transport schemes across the County providing a door to door car service and some like ours a minibus service.

We are members of the Community Transport Association (CTA) and have been for the last 4 years.

Our Transport Manager actively participates in attending their workshops which have provided leadership skills in Community transport and influencing the development of better strategy, policy, and adherence to regulations. They have also provided training on the various aspects of operating a community bus service. As part of the service provided by the CTA we receive publications and information sheets on legal and practical issues relating to operating a community minibus. This form of collaborative working for us produces an efficient working minibus.

Part of our development is linked to the Community Transport and Concessionary fares Section at OCC .We have dealt with the section our contact being Shirley McAnemy. We have applied and received funding for MIDAS training for our drivers and in the near future we will be applying for funding for MIDAS and disabled access training. They have also worked with us to give advice on restraint harness equipment for securing wheelchairs. .and occupants safely using the fixing points in our bus.

Oxfordshire Sexual Abuse & Rape Crisis Centre	Ref	SRev\37
Providing support groups, counselling, advocacy, helpline and email support, training and outreach work for victims of rape and sexual abuse.		
Total cost (over four years)	£344,987	Amount requested (over four years)
		£52,500
Previous grants: Revenue grant 2013/14 – 2016/17 £40,000 (£10,000/year)		

District ward areas covered:

All areas

Scoring

Does the grant reduce each year?		
Yes, the grant amount reduces by around 25 per cent each year. The proportion of their total costs covered by our grant reduces by between 3 and 8 per cent each year.	Score	2/2
Long term financial plan		
Their four-year financial plan is comprehensive and they expect to break even each year. There is a significant increase in their costs going into next year mostly relating to staff costs.	Score	1/2
Do they have at least one year's running costs in reserve?		
No, but they meet their own reserves policy to have between 3 and 6 months running costs at all times.	Score	1/2
Have they covered their costs for the last two years?		
Yes, they have made a reasonable but not excessive surplus for the last two years.	Score	2/2
What are their other funding sources?		
They provided a comprehensive list of funding sources, many of which are secured for next year (although often ring-fenced for specific activities).	Score	1/2
Evidence of local need		
Community Safety Team Leader: There is strong evidence of need (suggested score - 2 points).	Score	2/2
Grants Officer: There is strong external evidence of need for support for victims of sexual crime/abuse, including within the Community Safety Partnership's action plan.		
Working with our corporate priorities		
Community Safety Team Leader: They offer high levels of contribution to the thriving community priority (suggested score 2 points).	Score	2/2 (counts as 4 points as weighted scores)
Grants officer: They offer high levels of contribution to a number of actions within the thriving communities' objective and with our equality objectives.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
Their volunteering policy seems robust and they encourage volunteering where possible (with over 70 volunteers at the moment).	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Community Safety Team Leader: I am confident this is the best solution, but would like to see them link-up with other domestic abuse services (suggested score 2 points). I suggest this is a condition of the grant.	Score	2/2
Grants Officer: They have a proven track record of providing specialist support for victims of rape and sexual abuse and provided strong evidence of support from external agencies.		

How well do other agencies / council staff support the service this organisation provides?			
Community Safety Team Leader: Strongly supports this service (suggested score 2 points).		Score	2/2
Grants Officer: Internal officers and external agencies gave strong support to this service.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
Their targets seem reasonable. Their organisational targets could have reflected more how their organisation will change over the four years.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
Their delivery and development plans appear robust and they are likely to achieve them.		Score	2/2
What is the funding for?			
To continue their support services for women who have experienced rape or sexual abuse, their training programme for people working with victims of rape and sexual abuse and raising awareness.		Score	1/2
Total score	23/26	Recommended Grant	£52,500

Applicant responses	
<p>How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?</p>	<p>Evidence is provided by the year on year increase in numbers of people accessing our services. In 2014-15 we saw a 30% increase in the number of women we supported across our services, compared to the previous year. We currently have a 6-9 month waiting list to access face to face services because of the demand on our organisation.</p> <p>This mirrors Thames Valley Police's reporting figures for sexual violence, which saw 376 people report sexual crimes in South Oxfordshire, an increase of 41% on the previous year. We know from national evidence (Sexual Offending overview -Ministry of Justice, Home Office & the Office for National Statistics, 2013) that only around 15% of those who experience sexual violence will report this to the police, putting the actual number of crimes in the South Oxfordshire region around 2500 in the last 12 months.</p> <p>The Sexual Offending overview also anticipates that 2.5% of the female population will experience some form of sexual violence in any 12 month period. Given South Oxfordshire's female population we would expect that in excess of 1700 women will experience sexual violence in any given year. Furthermore we know that many women take years to overcome their experiences, meaning that many more need support.</p> <p>The South Oxfordshire Community safety plan for 2016-17 outlines a need to work on domestic abuse, rape and female genital mutilation, highlighting the need for organisations such as OSARCC to be providing support in this area.</p> <p>Need is also evidence by the success of our training programme in south Oxfordshire over the last 4 years. We have repeated trained more than 50 professionals a year, and often have to run a waiting list for these courses. Professionals attending the Sexual Violence Awareness courses report increased confidence in both their personal and their organisations capacity to support survivors of sexual violence, increased awareness of perpetrator tactics and the law, and increased awareness of our services as a referral point for survivors. Participants on this course have described it as an "amazing course" and in line with feedback from participants we have developed a second 'Working with Disclosures' course to further increase confidence of professionals.</p> <p>Service users describe our work as 'life changing' with some telling us:</p>

	<p>“It was like being heard by somebody for the first time, someone I could trust, who would listen to me and understood what I needed, gave me options and put everything in place I had asked for. It was like a weight has been lifted off of my shoulders, finally being able to trust a professional and know that they would keep to their word.”</p> <p>“I am now back at work full time and can function, [I] also don't want to harm myself and [am] in a loving/equal relationship.”</p> <p>“This service has saved my life and my mind, wouldn't be here without it.”</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>OSARCC has been providing services to survivors of sexual violence since 1979, as such we have a long history of providing services which meet the needs of the local community.</p> <p>OSARCC has been externally verified as meeting the Rape Crisis England and Wales National Service Standards which act as a compliance and quality check for Rape Crisis Centres across England & Wales. OSARCC provides a value for money service with more than 70 volunteers contributing to our work.</p> <p>Service users can access multiple services at the same time. For example a service user might use the advocacy service to cope with the day-to-day impact of the violence they have experienced and the counselling service to help with the longer term recovery of their experience. This means that survivors can access holistic provision within one agency removing the need to 'retell' their experience.</p> <p>All staff and volunteers attend the in house training of the local centres and also attend further CPD in order to ensure the efficiency of their work and continued support of the service users.</p> <p>Professionals routinely rate our training as good or excellent with many reporting it has enable them to support survivors more effectively.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Beneficiaries include the following groups located in each of the 5 districts of Oxfordshire:</p> <p>Female survivors of sexual violence of any age (helpline and email support services - 347 in 2015/16, we anticipate 10% of these live in SODC)</p> <p>Female survivors of sexual violence over the age of 18 (support group, advocacy and counselling service - 109 in 2015/16, 10 from SODC)</p> <p>Male and female friends, family and professional supporters of survivors (helpline and email support services). Professional supporters of survivors (training and advice services - 54 trained in SODC in 2015/16).</p> <p>Young people aged 14 and above (outreach services, 582 in 2015/16).</p> <p>In 2016/17 we will also be launching new services for those ages under 18, this work will include outreach work in schools raising awareness of healthy relationships and consent, and face to face support for women aged under 18.</p> <p>Our services are available to many minority groups including those with disabilities, those from minority ethnic groups, those who have mental health issues, those who have a reliance on drugs and alcohol. We provide travel expenses to service user when this will prohibit their access to the service.</p>

Applicant's financial forecast - Oxfordshire Sexual Abuse & Rape Crisis Centre

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of gear (A) (include savings and reserves in this figure)		£135,259	£136,857	£136,857	£137,511	£137,346
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)					
	Director costs	£ 40,461	£ 42,484	£ 44,608	£ 46,838	£ 49,180
	Administration Officer costs	£ 21,998	£ 23,098	£ 24,253	£ 25,466	£ 26,739
	Services Manager Costs	£ 9,901	£ 31,190	£ 32,749	£ 34,386	£ 36,106
	Volunteer & Outreach Coordinator Costs	£ 28,581	£ 30,010	£ 31,510	£ 33,086	£ 34,740
	Counselling Coordinator costs (2 x part time post)	£ 19,109	£ 40,128.17	£ 42,135	£ 44,241	£ 46,453
	Support Group Facilitator costs	£ 12,369	£ 12,987	£ 13,637	£ 14,319	£ 15,035
	Big Lottery Project Coordinator costs	£ 21,624	£ 22,705	£ 23,840	£ 25,032	£ 26,284
	Big Lottery project worker costs (2 x part time posts)	£ -	£ 30,360	£ 31,878	£ 33,472	£ 35,145
	Training and development (all staff and volunteers - includes helpline volunteer supervision)	£ 13,000	£ 13,000	£ 13,000	£ 13,000	£ 13,000
	Expenses - travel for all staff	£ 8,000	£ 8,400	£ 8,820	£ 9,261	£ 9,724
	Clinical supervision costs for staff	£ 9,600	£ 9,600	£ 9,600	£ 9,600	£ 9,600
	Clinical supervision costs for volunteer counsellors	£ 3,600	£ 7,200	£ 9,000	£ 10,800	£ 10,800
Building costs	Rent/mortgage	£ 26,000	£ 26,000	£ 26,000	£ 26,000	£ 26,000
	Business rates	£ -	£ -	£ -	£ -	£ -
	Gas	£ -	£ -	£ -	£ -	£ -
	Water	£ -	£ -	£ -	£ -	£ -
	Electricity	£ -	£ -	£ -	£ -	£ -
Services	Waste collection/disposal	£ -	£ -	£ -	£ -	£ -
	TV license/packages	£ -	£ -	£ -	£ -	£ -
	Wi-Fi/broadband	£ 1,500	£ 1,500	£ 1,500	£ 1,500	£ 1,500
	Phone Line	£ 1,500	£ 1,500	£ 1,500	£ 1,500	£ 1,500
	Building maintenance	£ -	£ -	£ -	£ -	£ -
	Cleaning	£ 850	£ 893	£ 937	£ 984	£ 1,033
	Alarm/Emergency lighting maintenance	£ -	£ -	£ -	£ -	£ -
	Legal Costs for staff contracts etc	£ -	£ -	£ -	£ -	£ -
	Window cleaning/landscaping	£ -	£ -	£ -	£ -	£ -
Supplies, equipment and consumables	Stationery and postage	£ 3,000	£ 3,000	£ 3,000	£ 3,000	£ 3,000
	ICT development	£ -	£ 1,000	£ 1,000	£ 1,000	£ 1,000
	Meetings costs (conference rooms, catering etc etc)	£ 1,000	£ 1,000	£ 1,000	£ 1,000	£ 1,000
	Publicity and marketing (design, print and photocopying)	£ 5,000	£ 8,500	£ 9,000	£ 9,500	£ 10,000
	Furniture, equipment and maintenance	£ 500	£ 1,000	£ 1,000	£ 1,000	£ 1,000
	Database costs	£ 1,800	£ 1,800	£ 1,800	£ 1,800	£ 1,800
Professional costs	Building Insurance	£ -	£ -	£ -	£ -	£ -
	Trustee Insurance	£ 500	£ 500	£ 500	£ 500	£ 500
	Public/Employee Liability & Personal Accident	£ 2,500	£ 2,500	£ 2,500	£ 2,500	£ 2,500
	Professional fees (accountants, legal, HR etc)					
Other costs	Service user travel and translation services costs	£ 2,000	£ 2,000	£ 2,000	£ 2,000	£ 2,000
	Director MA costs		£ 6,000	£ 6,000		
	Young Women's project conference costs					£ 5,000
	Young Women's project monitoring and learning costs		£ 15,000	£ 15,000	£ 15,000	£ 15,000
	Service evaluation costs	£ 3,000	£ 6,000	£ 6,000	£ 6,000	£ 6,000
	External training costs	£ 2,000	£ 2,000	£ 2,000	£ 2,000	£ 2,000
	Total Expenditure (B)	£ 239,392	£ 351,354	£ 365,766	£ 374,785	£ 393,639
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)	£ 5,000	£ 7,500	£ 10,000	£ 10,000	£ 10,000
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	Grants from local councils, agencies, government bodies	£ 130,000	£ 15,000			
	Grants from philanthropic foundations/organisations	£ 9,300	£ 41,700			
	Fundraising income from community / events	£ 15,000	£ 20,000	£ 22,500	£ 25,000	£ 27,500
	Other donations	£ 5,000	£ 12,500	£ 12,500	£ 12,500	£ 12,500
	SODC grant	£ 10,000	£ 20,000	£ 15,000	£ 10,000	£ 7,500
	Predicted Gov and Local Authority grants		£ 60,000	£ 60,000	£ 60,000	£ 60,000
	Predicted Funding income from foundations		£ 31,534	£ 95,000	£ 112,000	£ 123,000
	Big Lottery Young Women's Funding	£ 66,570	£ 143,000	£ 151,300	£ 145,000	£ 153,560
Other income	Income from interest on reserves, endowment funds etc	£ 120	£ 120	£ 120	£ 120	£ 120
	Total Income (C)	£ 240,990	£ 351,354	£ 366,420	£ 374,620	£ 394,180
	Balances at gear end (i.e. line A - line B + line C)	£ 136,857	£ 136,857	£ 137,511	£ 137,346	£ 137,887

Applicant's project delivery/development plan - Oxfordshire Sexual Abuse & Rape Crisis Centre

Strategic Business Plan 2016-19

1. Introduction

Oxfordshire Sexual Abuse and Rape Crisis Centre (OSARCC) is a feminist organisation that exists to support women survivors of sexual violence whose lives have been affected by rape, sexual abuse or any other form of sexual violence.

We provide a variety of specialist services that include:

- Phone and email support for women and girls of any age
- Face to face support for adult women
- Support for those who are supporting women survivors
- Training and advice for people in other organisations who are working with survivors
- Outreach work in schools and universities to prevent violence against women and girls
- Campaigning, education and awareness raising amongst the population at large

OSARCC is an independent organisation affiliated to and working under the guidance of Rape Crisis (England and Wales). We were established in 1979 and registered as a charity and company limited by guarantee in 2009.

This document outlines our three-year strategy for 2016-19. It will be reviewed and developed on an ongoing basis by all OSARCC volunteers, trustees and staff. Further information can be found in the accompanying business plan.

2. Vision, Mission and Aims

Our Vision:

For women and girls to be free from the fear, experience and stigma of sexual violence and supported when it does occur.

Our Mission:

To support women survivors of sexual violence, promote and advocate for their needs and work towards the elimination of sexual violence

Aims

We have set ambitious aims for the next few years to ensure delivery our mission and that we continue to grow and develop as an organisation.

1. To provide a diverse range of effective services that meet the needs of women and girls in Oxfordshire who are affected by sexual violence
2. To raise awareness of the prevalence and impact of sexual violence and the needs for specialist services to support survivors
3. To challenge and change public attitudes about sexual violence in Oxfordshire and beyond

4. To explore the gap in services for survivors who do not define as women, and seek to create a strategy to address this lack of provision.

3. Core Values

Non-Directive

We do not try to influence women to take any particular action, nor do we try to impose our views on their decisions. We help service users to explore their options, in a way that does not pressure them to choose any specific path.

Non-Judgmental

We do not judge service users or other OSARCC members on their decisions

Empowerment

We aim to empower survivors to make their own decisions and to support them in whatever way they need.

Confidentiality

Whatever a service user says is confidential to the organisation within safeguarding limits.

Free

We provide free services in order to be accessible to all survivors.

Challenging Discrimination

We are a non-directive and non-judgemental organisation, but we will challenge discrimination in any form.

Committed to Good Practice

We strive to ensure the best quality service at all times. Working in line with the Rape Crisis England and Wales National Service Standards.

Women led

OSARCC believes that sexual violence is both a cause and consequence of women's inequality and discrimination. We are therefore committed to challenging such discrimination in our work, to run our services for women by women, to delivering our services in a safe, women-only space and to working within an empowerment approach. Our values are based on feminist principles and we aim to work with others towards the elimination of sexual violence.

Belief

We believe what women tell us. Furthermore, we firmly believe that sexual violence is never the fault of the survivor and we actively seek to challenge this myth.

4. Context

OSARCC's aims and objectives are informed by an assessment of the prevalence of sexual violence and the need for specialist support services for survivors in Oxfordshire. Sexual violence affects huge numbers of women and girls in the UK. 1 in 5 women will experience a sexual offence in her lifetime and 69,000 women experience rape every

year¹. The impact of sexual violence can be significant and long lasting with many women and girls choosing not to report to the police.

Oxfordshire is a rural county with several large populous towns, including Oxford, which has a diverse and transient population. Access to specialist sexual violence support is limited. OSARCC is the only non-statutory agency providing multiple holistic specialist services as a single provider and the county does not have a Sexual Assault Referral Centre.

Use of OSARCCs service increases year on year, this growth reflects the success of our previous strategic plan, which saw us increase our training and outreach provision, and the launch of both ISVA and counselling services. Nevertheless, the increased waiting lists for our services, and increase reporting figures in Oxfordshire (the number of sexual offences reported to the police from April 2013 – March 14 to April 2014 to March 15 increased by 43%) highlight the need to continue to ensure the on-going provision of service to meet the needs of women and girls across Oxfordshire.

We recognise that sexual violence affects people of all genders with an estimated 404,000 females and 72,000 males experiencing some form of sexual violence on average each year.² Increased requests for information on services which support survivors who are male or have complex gender identities, and those under the age of 18 have highlighted a need for OSARCC to explore provision for these groups.

OSARCC recognises the importance of women only space and the need to continue to work within a feminist empowerment framework. Any future service developments will always be guided by the core values which underpin our work.

5. Objectives 2016 -19

In order to ensure clarity, the objectives are in three categories:

- 1) **Overarching objectives** -These objectives ensure the on-going day to day delivery of services, focusing on finances, structures, and OSARCC's role within a wider framework of services across Oxfordshire
- 2) **Primary objectives** -These focus on service delivery for both support and prevention work, ensuring that women and girls across Oxfordshire are able to access support appropriate to their needs, and that we are furthering our work on awareness raising and prevention.
- 3) **Longer term objectives** - These objectives focus on gaps in the local area, recognising that they will need significant investments of resources.

¹ An Overview of Sexual Offending in England and Wales, January 2013 <https://www.gov.uk/government/publications/an-overview-of-sexual-offending-in-england-and-wales>

² An Overview of Sexual Offending in England and Wales, January 2013 <https://www.gov.uk/government/publications/an-overview-of-sexual-offending-in-england-and-wales>

Overarching Objectives

Primary Objectives

Longer Term Objectives

1) Achieve and maintain sustainability for OSARCC and its services through the development of a fundraising strategy, business plan, volunteer strategy, and Human Resources plan.

2) Consolidate OSARCC's position as the specialist sexual violence support organisation in Oxfordshire by using our specialist centre of expertise. Working in collaboration with statutory and voluntary agencies, as well as the public, to improve the response to survivors of sexual violence in Oxfordshire.

3) Develop a communications and marketing strategy to improve information provision for survivors and increase awareness of both sexual violence issues and support services across all communities.

4) Maximise and develop the listening service capacity including use of new technologies to increase accessibility and service user take-up

5) Ensure the continuation of our face to face services, meeting service users' needs with sustainable and high-quality services, creating a plan to manage and support women who may be waiting to access the services.

6) Engage in proactive awareness raising activities that challenge myths around sexual violence with the public, partners and other agencies, prioritising work on issues of sexual consent.

7) Ensure a focus on engagement with harder to reach groups across our services and to ensure service users' voices are heard at every level of the organisation.

8) To develop holistic support and preventative services for those under 18 and their families

9) Directly or indirectly address the gap in support for male survivors, and those with complex gender identities, across Oxfordshire, through exploration of service delivery models with partner organisations.

Targets 2016-2019

- 1) Achieve and maintain sustainability for OSARCC and its services through the development of a fundraising strategy, business plan, volunteer strategy, and Human Resources plan.
 - a. Creation of fundraising strategy, business plan, volunteer strategy, and Human Resources plan, with annual reviews with key stakeholders on an annual basis
- 2) Consolidate OSARCC's position as the specialist sexual violence support organisation in Oxfordshire by using our specialist centre of expertise. Working in collaboration with statutory and voluntary agencies, as well as the public, to improve the response to survivors of sexual violence in Oxfordshire.
 - a. Delivery of our external training program to professionals reaching 100 professionals each year across the county

- b. Sharing knowledge through forums and meetings for example the Rape & Serious Sexual Assault working group, CPS meetings
 - c. Resume the Sexual Violence Working Group meeting for key voluntary and statutory agencies across Oxfordshire, chaired by OSARCC
 - d. Create an online platform outlining pathways of support to survivors across Oxfordshire
- 3) Develop a communications and marketing strategy to improve information provision for survivors and increase awareness of both sexual violence issues and support services across all communities.
- a. Place at least two proactive media stories on OSARCC services
 - b. Increase engagement with OSARCC's social media by 10% on 2015-16 baseline levels
- 4) Maximise and develop the listening service capacity including use of new technologies to increase accessibility and service user take-up
- a. Increase the use of the helpline and email support services by 20% on 2015-16 levels
 - b. Launch text based service
 - c. Explore opportunities for other uses of technologies, for example web based support services such as forums
- 5) Ensure the continuation of our face to face services, meeting service users' needs with sustainable and high-quality services, creating a plan to manage and support women who may be waiting to access the services.
- a. Deliver 36 weekly support groups and support at least 20 women per year
 - b. Continue the delivery of our counselling service and secure future funding for sustainability of the service
 - c. Continue the delivery of our advocacy service, reaching at least 60 women per year
 - d. Develop a 'drop in' service for women on the waiting list
 - e. Create a robust and transparent 'waiting list' management system – for example offering monthly calls from the helpline to women on the waiting list
 - f. Publish service specific / targeted groups information materials
- 6) Engage in proactive awareness raising activities that challenge myths around sexual violence with the public, partners and other agencies, prioritising work on issues of sexual consent.
- a. Plan and deliver on awareness raising events
 - b. Work alongside and support partners in awareness raising activities
 - c. deliver schools based consent work to at least 800 young people a year
- 7) Ensure a focus on engagement with harder to reach groups across our services and to ensure service users' voices are heard at every level of the organisation.
- a. Meet with organisations working with 'easy to ignore' groups at least twice a year
 - b. Create a service user forum to help design, deliver and monitor services across the organisation
 - c. Explore ways of engaging service users in volunteer, staff, and trustee roles within the organisation
- 8) To develop holistic support and preventative services for those under 18 and their families
- a. Create a plan for delivery of services to those aged 14-18 based on identified need
 - b. Explore service for families of supporters, including increased use of our helpline based service for this demographic

- 9) Directly or indirectly address the gap in support for male survivors, and those with complex gender identities, across Oxfordshire, through exploration of service delivery models with partner organisations.
- a. Run focus group sessions with other agencies exploring the existing provision and gaps in service
 - b. Look to find partner agencies to co-deliver work to male survivors.

6. Resources

Personnel resources required to deliver our work plan are as follows:

- 1 FTE Director
- 0.8 FTE Services Manager
- 0.8 FTE Centre Administrator
- 1 FTE Volunteer and Outreach Co-ordinator
- 1.13 FTE Counselling Coordinator(s)
- 1 FTE Advocate
- 0.5 FTE Support Group Coordinator
- 0.67 FTE Project Coordinator (Young Women's Project)
- 1.25 FTE Young Women's Workers (to be recruited in 2017)
- 50 x part time Helpline Volunteers
- 10 x part time Counselling Volunteers
- 10 x part time Fundraising Volunteers

Our current premises is based at a confidential location in central Oxford, enable us to undertake our current work in a comfortable, safe space. We are exploring the possibility of 'outreach hubs' across the county to deliver work from (this already happens with our advocacy service).

Service delivery is undertaken in the following ways:

- 1) Helpline and email services
 - a. Delivered through the use of trained volunteers who undertake a 72 hour training programme
 - b. We recruit and train 24 volunteers a year (delivered by a peer learning model and overseen by our Volunteer & Outreach Coordinator)
- 2) Counselling service
 - a. Delivered through qualified paid staff and qualified volunteers who undertake a 60 hour training programme on top of their external counselling qualifications
 - b. We recruit and train 8 volunteers a year (delivered by a peer learning model and overseen by our Volunteer & Outreach Coordinator)
- 3) Support Group service
 - a. Delivered through a qualified paid staff member (Support Group Coordinator) and two volunteers who have 12 months experience of delivering helpline work with OSARCC
 - b. Volunteers are recruited and trained on a 'ad hoc' basis
- 4) Advocacy service
 - a. Delivered through a paid qualified ISVA
 - b. May include volunteer delivery a later date

- 5) Training and advice for people in other organisations who are working with survivors
 - a. Delivered by our Volunteer & Outreach Coordinator, and volunteers
- 6) Outreach work in schools and universities to prevent violence against women and girls
 - a. Delivered by our Project Coordinator, and volunteers
- 7) Campaigning, education and awareness raising amongst the population at large
 - a. Overseen by our Director and delivered through staff and volunteers

The operational work of the organisation is overseen by our Services Manager. Referrals and enquires about the service are undertaken by our Centre Administrator, who also oversees data collection and analysis for all services. The Director acts as the strategic lead for the organisation, including exploring partnership working with other agencies, and fundraising.

OSARCC has a three year fundraising plan in place, with a wide mix of funding sources to ensure the on-going provision of services. The organisation commits to holding 3-6 months running costs in order to avoid gaps in provision.

7. Collaborative working

OSARCC seeks to work collaboratively wherever possible, in order to run a cost effective service.

We currently work in collaboration with the following organisations who provide free room hire for our outreach work:

- Mind
- Early Intervention Hubs
- Children's Centres

We also seek to share learning and other resources with other Rape Crisis Centres and survivor based services across the Thames Valley Region.

We work collaboratively with Thames Valley Police running prevention campaigns aimed at perpetrators. This work will continue in 2016-2020 building on the success of the 'Consent is Everything' campaign in 2015-16.

During 2016-2020 we will seek to actively increase our collaborative working and are currently in conversation with the following organisations looking at how we can maximise impact whilst reducing cost:

- Reducing the Risk – for delivery of training on Domestic and Sexual Violence
- ODAS – looking at shared working (for example the outreach provision offered by the organisation)
- Circles South East, Thames Valley Restorative Justice Service, ODAS, Thames Valley Partnership – looking at providing holistic support to perpetrators and survivors through partnership working
- Restore – we currently rent space from Restore and have previously had conversations about more joint working, for example joint fundraising events, sharing the costs of any such events and maximising income for both organisations
- Oxfordshire Advocacy – exploring the feasibility of increasing advocacy provision across the organisations, sharing our specialist knowledge
- Other charitable organisations – for example exploring the feasibility of shared office space and suppliers

8. Monitoring and evaluation

Monitoring and evaluation is undertaken to monitor and analyse use and provision of service, evaluate effectiveness, develop services and ensure OSARCC is meeting its aims and outcomes. Critically, it is also an important way in which we involve our service users in the development and decision-making of our services, which enables us to ensure that service users remain at the heart of the organisation. We monitor and evaluate in a number of ways across the services. The helpline and email services are anonymous, so data is not actively asked for from service users who access these services.

Helpline

- Call log sheets capture time, length and type of call alongside data about the caller
- Our stats database is updated monthly to record all calls, hang ups and key information about each call
- Our caller ID database records all new callers and captures key data about each caller
- Stats and service delivery is reviewed by staff and reported to trustees on a six-weekly basis
- An online survey on our website captures information from service users about themselves and the impact of our service

Email

- Email log sheets capture time, length and type of call alongside data about the emailer
- Our stats database is updated monthly to record all incoming and outgoing emails and key information about each email
- Our caller ID database records all new callers and captures key data about each emailer
- Stats and service delivery is reviewed by staff and reported to trustees on a six-weekly basis
- An online survey on our website captures information from service users about themselves and the impact of our service

Face to face services

- Data monitoring sheets capture key data from each service user
- Each service user completes a before and after questionnaire to capture data on the impact of the service based on indicators such as self esteem, ability to form relationships, physical health, and emotional well-being
- Annual evaluations of the services service are conducted by an external evaluator, including qualitative one to one interviews with group members, staff and volunteers
- Consultation with service users via email, phone and in the group contributes to informing service development

In 2016-2020 we will also be undertaking a holistic review of our monitoring, evaluation and learning work, aligning it more effectively to our Theory of Change and to funder outcomes to ensure that we are able to provide robust outcomes data on the impact of our service.

9. Risk analysis

The board of trustees undertakes an annual risk review to identify and take steps to mitigate any risks to the organisation. The largest current risk is funding. We are mitigating this risk by increasing both the number and mix of funding sources - generating income via grants, general fundraising and donations and earned income via the provision of external training.

Oxfordshire Association for the Blind		Ref	SRev\59
Information, Advice and Support for Visually Impaired People and their Carers in South Oxfordshire			
Total cost (over four years)	£242,300	Amount requested (over four years)	£25,000
Previous grants: Revenue grant for core costs £20,000 between 2013/14 – 2016/17 (£5,000 / year) Revenue grant for core costs £24,859 between 2008/9 - 2012/13 (£4,863 in 2008/9 then £4,999 / year) Revenue grant for core costs (amounts unknown) in 2007/8 and earlier.			

District ward areas covered:

All areas

Scoring

Does the grant reduce each year?			
The organisations request reduces year on year over the four-year period.			Score 2/2
Long term financial plan			
The organisation's four-year financial plan is comprehensive and achievable.			Score 2/2
Do they have at least one year's running costs in reserve?			
At 31 March 2016 the organisations held reserves of £320,568 this meets their reserves policy to hold free reserves to cover 12 months of expenditure (£331,352 at 31 March 2016).			Score 1/2
Have they covered their costs for the last two years?			
The organisation has made losses in the last two years (£7,415 in 2014/15 and £14,739 in 2015/16) but these are minimal against the size of their turnover.			Score 0/2
What are their other funding sources?			
The list of incoming funding provided doesn't identify any secured funding for 2017-18.			Score 1/2
Evidence of local need			
Equality officer: There is strong evidence of local need. OAB are the only organisation in the district providing this service across South Oxfordshire (suggested score 2 points).			Score 2/2
Working with our corporate priorities			
Equality officer: High levels of contribution towards one of our equality objectives (suggested score 2 points).		Score	2/2 (counts as 4 points as weighted scores)
Grants officer: This service contributes to our priority around 'thriving communities and to our equality objective to help deliver better outcomes for disadvantaged groups.			
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?			
A volunteering policy is provided.			Score 2/2
What evidence is there that their service is the best solution to the need identified?			
Equality Officer: Significant levels of evidence that this is the best solution to meet the identified need (suggested score 2 points).			Score 2/2
How well do other agencies / council staff support the service this organisation provides?			
Equality Officer: I strongly support the work this organisation does to meet the needs of people with visual impairments (suggested score 2 points).			Score 2/2
Grants Officer: Support for the organisation is provided by a number of national organisations.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			

The proposed targets increase year on year over the four-year period and evidence of need was provided to support this growth.	Score	2/2
How achievable/reasonable is their project delivery/development plan?		
The project plan provided appears reasonable and achievable.	Score	2/2
What is the funding for?		
The funding will help to ensure the continued service in South Oxfordshire together with an increase in the number of beneficiaries.	Score	1/2
Total score	23/26	Recommended Grant
		£25,000

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>1650 people in South Oxfordshire are living with either moderate or severe sight loss - a recent (2015) figure derived from the Royal National Institute of Blind People's sight loss data tool http://www.rnib.org.uk/knowledge-and-research-hub-key-information-and-statistics/sight-loss-data-tool.</p> <p>There are over 670 residents of South Oxfordshire on Oxfordshire Association for the Blind's database and over the past 12 months we have provided help on 495 occasions to individuals through visits, email or telephone. We are constantly seeking to identify people in the area who are in need of our services in order to ensure they receive information about ways in which OAB could assist them and have the opportunity to access our services.</p> <p>By its very nature, sight impairment causes difficulties with communication, daily living skills, access to information, mobility and recreation, and therefore a need for information, advice and support to retain and develop independence and autonomy.</p> <p>OAB has existed in Oxfordshire for nearly 140 years; we are very familiar with the needs of local visually impaired people and their families. We work in close cooperation with all the agencies and organisations in the county who support sight impaired people, all of which recognise the need for an association that provides local services to local people. These include the County Council Visual Impairment Team, the Education Department, the Oxford Eye Hospital, the Macular Society, Guide Dogs and the Retinitis Pigmentosa Society. OAB is also a leading member of the Low Vision Strategy Group of Oxfordshire, which has developed the Oxfordshire Low Vision Strategy designed to meet the needs identified by all of the agencies and our services users in the county including in South Oxfordshire.</p>
Why is your service is the best solution to meet this need?	<p>Services provided by OAB for the visually impaired residents of South Oxfordshire are not replicated in the area. Indeed, we work closely with agencies such as social services Visual Impairment Team to ensure that we complement statutory provision.</p> <p>OAB is the only charity in the county providing support for all. Other groups may help people with a specific need or eye condition. OAB's services are available to everyone affected by sight loss, whatever their eye condition or degree of sight loss, and whether or not they are formally registered as sight impaired. We also support carers.</p> <p>No other local charity provides a comparable range of services, from information and advice to the resource centre (the only one in the county) to services such as IT training, children's activities and emotional support.</p> <p>With over 100 years' experience, OAB takes a long-term view and is working to prepare for the inevitable increased demand on services due to rising numbers of people affected by sight loss. We are working to increase sustainability and planning by developing more collaborative working so that we are in the best possible position to meet local needs into the future.</p>

<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The beneficiaries of our support will initially be the 670 visually impaired people in South Oxfordshire with whom we already have contact, their families and carers. In addition, there is a constant stream of people we are made aware of through new referrals including from the Oxford Eye Hospital (where we have a Sight Advisory Desk to enable us to begin to support people swiftly) and the county council visual impairment team, with whom we are in frequent contact.</p> <p>Service users may be of any age but the majority, due to the demographics of visual impairment (one in five people aged 75 and over are living with sight loss), are elderly and often have additional impairments or infirmity. Many of our services focus on the needs of this older age group but we have also recently expanded our work to provide support and activities for visually impaired children and young people, and their families.</p> <p>There will also be a benefit to local people through the provision of rewarding volunteering opportunities and free sight impairment awareness training for our own volunteers and those volunteers supporting anyone with a visual impairment in South Oxfordshire.</p>
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Applicant's financial forecast - Oxfordshire Association for the Blind

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this		£179,500	£162,700	£152,700	£144,000	£135,300
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually	39800	43600	46700	46700	£46,700
	Training and development (all staff and volunteers)	200	£200	£200	£200	£200
	Expenses	900	£1,100	£1,100	£1,100	£1,100
	Agency fees and other related employment costs	0	£0	£0	£0	£0
Building costs	Rent/mortgage	£100	£100	£100	£100	£100
	Business rates	£600	£700	£700	£700	£700
	Gas	£200	£200	£200	£200	£200
	Water	£200	£200	£200	£200	£200
	Electricity	£200	£300	£300	£300	£300
	Depreciation	£2,200	£2,200	£2,200	£2,200	£2,200
Services	Total					
	Waste collection/disposal	£200	£200	£200	£200	£200
	TV license/packages	£0	£0	£0	£0	£0
	Wi-Fi/broadband	£100	£100	£100	£100	£100
	Phone Line	£500	£500	£500	£500	£500
	Building maintenance	£200	£200	£200	£200	£200
	Cleaning	£500	£500	£500	£500	£500
	Alarm/Emergency lighting maintenance	£300	£300	£400	£400	£400
	Legal Costs for staff contracts etc	£0	£0	£0	£0	£0
	Window cleaning/land scaping	£0	£0	£0	£0	£0
Supplies, equipment and consumables	Stationery and postage	£600	£600	£700	£700	£700
	ICT development	£400	£400	£400	£400	£400
	Meetings costs (conference rooms, catering etc etc)	£100	£100	£100	£100	£100
	Publicity and marketing (design, print and	£400	£400	£400	£400	£400
	Furniture, equipment and maintenance	£800	£800	£900	£900	£900
	Depreciation-furniture and equipment	£500	£900	£900	£900	£900
	ICT maintenance	£700	£700	£700	£700	£700
	Activity materials	£100	£100	£200	£200	£200
	Transport	£100	£200	£200	£200	£200
	Equipment purchased for resale to clients at nil profit	£1,300	£1,300	£1,400	£1,400	£1,400
Equipment purchased for demonstration/training	£1,500	£400	£400	£400	£400	
Professional costs	Building Insurance	£500	£500	£600	£600	£600
	Trustee Insurance					
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc	£300	£400	£400	£400	£400
Other costs	Fundraising - direct costs	£500	£600	£600	£600	£600
Total Expenditure (B)		£54,000	£57,800	£61,500	£61,500	£61,500
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£1,000	£1,000	£1,000	£1,000	£1,000
	Earned income (charity shops, fees for training etc - if	£2,000	£3,000	£3,000	£3,000	£3,000
	Contracted services from local authorities and other organisations	£0	£0	£0	£0	£0
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£2,000	£2,000	£2,000	£2,000	£2,000
	Grants from philanthropic foundations/organisations	£18,000	£20,000	£20,000	£20,000	£20,000
	Fundraising income from community / events	£2,000	£3,500	£3,500	£3,500	£3,500
	Other donations	£4,000	£7,500	£7,500	£7,500	£7,500
	Legacies	£7,500	£10,000	£15,000	£15,000	£15,000
Other income	Income from interest on reserves, endowment funds etc	£700	£800	£800	£800	£800
Total Income (C)		£37,200	£47,800	£52,800	£52,800	£52,800

Applicant's project delivery/development plan - Oxfordshire Association for the Blind

Services and future plans in South Oxfordshire

Services currently provided or being developed by OAB include the following:

- Information and advice on anything to do with visual impairment, including all aspects of coping and developing independence
- Help in identifying specialist equipment and daily living aids that will promote independence, and the opportunity to see and try out and loan such equipment
- IT training sessions, enabling someone to use computers and mobile devices.
- Reducing social isolation and emotional support.
- Visual impairment awareness training to volunteers, local charities, organisations and carers.
- Work with children and young people.

Living with sight loss: information and advice

The provision of information and advice is at the core of what we do at OAB. It is provided at our resource centre (the only one of its kind in Oxfordshire), a permanent desk at the John Radcliffe Oxford Eye Hospital, over the phone, by email, through individual volunteers and volunteer groups and by a quarterly newsletter and increasingly on-line.

Much of the content of our newsletter and website is relevant to the whole county, but we also make people aware of local news and events. For example, the most recent newsletter (November 2016 <http://www.oxeyes.org.uk/website/newsletter/>) included two articles from the SODC *South News* magazine, and a piece from the editor of DAWN, the Didcot, Abingdon and Wantage talking newspaper. Most editions carry something from the SODC residents' newsletter *Outlook*. Past issues have included information specific to South Oxfordshire, including articles about local community funding, recycling and access.

People may contact us for information, advice or support about anything to do with visual impairment as well as providing the much needed emotional support those who are struggling to come to terms with their sight loss. We also signpost people to other services and sources of support, including good neighbour schemes and social groups.

Last year this service helped 495 South Oxfordshire residents.

Development plans for the information/advice service

- We will continue to provide information and advice on all aspect of coping and developing independence to visually impaired people in South Oxfordshire.
- Continue to work with other organisations to deliver the objectives of the Oxfordshire Vision Strategy.

Equipment Aids

We stock a wide range of daily living aids, from talking watches to daylight lamps, and large-print diaries to the latest electronic magnifiers. Individuals, groups and organisations are welcome, and do, visit. We spend time with people to find out about their eye condition, how their sight is affected, and discussing what changes the longer term may bring. Part of our resource centre is fitted out as a demonstration kitchen; for most people, it is hugely important to be able to continue to prepare their own meals and drinks, and here they can discuss kitchen tasks they find difficult, get help with advice on techniques and suggestions for gadgets.

Some smaller items are for sale in the resource centre but they are not sold at a profit; others are for demonstration purposes only. Unfortunately, a lot of specialist equipment is expensive; video magnifiers for example cost around well over £1000, which puts them out of the reach of many people. However, second-hand equipment is frequently donated to OAB and we endeavour to make this available to those who would not otherwise be in a position to afford it. The equipment is checked and cleaned before we assess its suitability for an individual on the waiting list, deliver and install it.

Development plans for the continued provision of life-changing equipment

- We operate a person-centred approach to our support, which aims to meet the needs of individual residents of South Oxfordshire. We will continue to give each person the opportunity to identify their own needs and work with them to meet their aspirations.

I.T. Training Sessions

IT training at OAB has developed in response to what visually impaired people have asked us for and is delivered at our training suite.

For someone with a visual impairment, the ability to use I.T. successfully can make a major contribution to retaining independence, reducing reliance on others, and allowing them to keep in touch with friends and the world around them. It is of course also essential for people's employment prospects.

At OAB we continue to look for innovative ways to help people with sight loss to be as little different as possible from the rest of a population that increasingly sees 'being online' as something one takes for granted.

We offer one-to-one training sessions in information technology skills. These are tailored to an individual's needs and range from a basic introduction to IT to general improvement

of skills/introduction of new skills to using speech on a mobile device, including how to manage emails and text messages, web browsing etc.

In addition to training, we demonstrate and give people the opportunity to try different software and mobile devices such as smartphones and tablet computers. This free, impartial advice is invaluable. We help them decide what will be the best solution for them, bringing together an understanding of eye conditions with knowledge of the technology.

The work OAB does in this field is well recognised by other organisations; we get referrals from the Low Vision Clinic at the Oxford Eye Hospital, rehabilitation officers at the Oxfordshire Visual Impairment Team (Social and Community Services), and Age UK (amongst others).

We expect increasing numbers of people to access this service. More than 80% of sight loss is in the 60+ age bracket – a group that is set to increase in size. As time goes on, people losing their sight in older age will increasingly be users of IT and keen to adapt their skills and continue to do the things most of us now take for granted, from accessing information to organizing grocery deliveries to online banking. IT skills are also increasingly fundamental to the way in which people use and organise their leisure time, whether to obtain information about leisure activities, to make bookings, or through the use of social media to keep in touch and make arrangements.

We are not aware of any other one-to-one free training in Oxfordshire unless you are employed or in full-time education; there is certainly no free specialised training and advice of the sort OAB provides. We therefore believe that the service OAB provides is essential to enabling the sight impaired residents of South Oxfordshire to access information technology.

Development plans for technology assistance and training

- OAB believes that providing visually impaired people with IT skills is essential if they are to access information, services, and community/leisure facilities on a more equal footing. We will continue to make one-to-one IT training available to all South Oxfordshire residents affected by sight loss.
- The amount of people accessing this service from South Oxfordshire do not currently match the percentage of beneficiaries from some other areas of the county. We will therefore take measures to make people from South Oxfordshire more aware of this service, and aim to increase the numbers accessing it.
- We plan to run workshops on specific topics. One area we are looking at is video gaming, which is a huge leisure activity especially for younger people and an important way in which they connect with their peers. We are talking to Special Effect (an Oxfordshire charity that works to help people with physical disabilities to enjoy computer games) about such a workshop that will be promoted in South Oxfordshire.

Reducing social isolation and emotional support

The emotional impact of losing your sight can be intense; people have described feelings akin to grief and bereavement. Talking to someone in confidence can be immensely helpful in understanding and dealing with difficult emotions and OAB provides free counselling sessions for people struggling with their sight loss. Our counsellor is herself registered blind.

When people are ready, we try and help to build on their confidence with the provision of enjoyable and fulfilling activities and social opportunities.

A relatively new OAB group ActivEyes provides some really exciting sporting opportunities for sight impaired members and is going from strength to strength. We have a regular programme of activities including cycling and blind tennis, and the group also undertake ad-hoc events, recently attending a British Blind Sports Day event and a day out Rock Climbing. We are seeking to collaborate with Henley Rowing Club next year to offer this as a new activity. If popular, we are very open to this being a regular activity.

There are also several groups in South Oxfordshire where visually impaired people can get together socially. These help to forge friendships and give people an opportunity to share ideas and strategies, find out about activities and events and how daily living aids used by others may be able to help them. The groups in Didcot, Wallingford, Thame and Henley also provide valuable respite for carers.

In addition, we have good links and provide support and our expertise to groups such as Goring Macular Group and Oxfordshire Retinitis Pigmentosa Group. A large amount of that support is in South Oxfordshire.

We could not offer this range of social opportunities without the help of volunteers:

- **The social groups in Didcot, Wallingford, Thame and Wantage are run entirely by local volunteers.**
- **Our activities group for visually impaired adults ActivEyes was set up and is run by a volunteer. As the group has grown, a second volunteer has been recruited to assist him.**

Development plans for social groups in South Oxfordshire

- South Oxfordshire residents attending any group will continue to receive support and assistance in accessing other community, leisure and support facilities.

- **We will increase our efforts to widen awareness of the ActivEyes group to draw in more residents from South Oxfordshire, thus increasing participation in activity and sport.**
- We will ensure that the Didcot and Thame social groups are publicised to visually impaired local residents, giving them the opportunity to get out and meet other people.
- We will pursue a possible collaboration with Henley Rowing Club.

Outreach and liaison with other groups

OAB offers free visual impairment awareness training to volunteers from organisations whose services are available to and likely to benefit Oxfordshire residents living with sight loss. In this way, we build up strong networks across the county, and work/share knowledge with other organisations.

Our aim is to ensure that assistance OAB cannot itself provide is available from another source, and to do all we can to ensure that the help given is appropriate through the provision of training/information/advice to other groups.

In South Oxfordshire, we have run visual impairment awareness workshops for volunteers from:

- **Chinnor Good Neighbour Scheme**
- **Didcot Good Neighbour Scheme**
- **Henley Good Neighbours**
- **Wallingford Volunteer Centre**
- **Wantage Good Neighbour Scheme**
- **Thame Day Centre**

In addition, we have trained volunteers in groups whose services are available across the county, such as the Oxfordshire Volunteer Befriending Scheme, Phone Friends (Age UK) and Keen (which provides sports and social activities for disabled children and adults).

We have recently held information days in Thame and Henley. An OAB stall was set up in the towns' libraries and an OAB staff member was available to answer questions, give out information and show examples of daily living aids and equipment. Some people have needs that can be followed up subsequently, perhaps with referral to an OAB service or to another organization.

As well as Oxfordshire-based groups, we are increasingly building links with national organisations; for example, running IT workshops jointly with RNIB.

Development plans for training, outreach events and future collaborations

- **We will hold further information days in South Oxfordshire, including Didcot in early spring 2017.**
- **We will continue to offer free training to groups in South Oxfordshire whose services are provided by volunteers and available to sight impaired people. We will proactively approach more such groups in South Oxfordshire with the offer of such training.**
- **In 2015 we received some funding from the Future-Building Fund to develop visual impairment awareness training courses for companies and organisations whose work brings them into contact with people living with sight loss; these include care homes, care agencies and organisations working with disabled people. A fee is charged for the training and we will continue to market these courses and build up this activity in order to enhance our longer-term sustainability.**
- **We have also recently met with the Future-Building Fund to explore other possible funding and social enterprise opportunities.**

Work with children and young people

Over the past few months, OAB has been developing activities and support for children and young people, who are well supported by statutory services in terms of education and mobility, but have traditionally been much more limited in their access to activities and family support. We have been working with Oxfordshire's visual impairment team, LOOK Oxfordshire and the county's Special Educational Needs Support Services (SENS) to provide activities such as arts and crafts, museum trips and sports for visually impaired children and young people from South Oxfordshire and across the county. The events and activities are all open to sight impaired children and young people and their families, including other siblings; the inclusivity is an important aspect. Around half of the children and young people also have other disabilities.

We also work with the SENS to provide I.T. support to their team of six specialist teachers.

Development plans for work with children and young people

- There are currently ten families in South Oxfordshire who receive information about events and activities for children and young people. We will work to build contacts with those who have not yet attended.
- We will provide an average of one activity a month which will be publicised to all the children, young people and their families in South Oxfordshire for whom we have contact details.

Home-Start Southern Oxfordshire	Ref	SRev\47
Home-Start Southern Oxfordshire is a voluntary home-visiting scheme for families with young children who are under stress and experiencing difficulties.		
Total cost (over four years)	£320,326	Amount requested (over four years)
		£66,706
Previous grants: Revenue grant for running costs 2008/9 – 2012/13 £10,724 (£1,585 08/09, £1,639 9/10 then £2,500/ year		

District ward areas covered:

Chinnor, Watlington, Chalgrove, Berinsfield, Didcot West, Didcot South, Didcot North East, Cholsey, Benson & Crowmarsh, Wallingford, Goring, Sonning Common, Woodcote & Rotherfield, Henley-on-Thames and Thame.

Scoring

Does the grant reduce each year?		
The grant request is for 30 per cent for the first two years and then reduces to 15 per cent and then eight per cent.	Score	2/2
Long term financial plan		
The financial plan provided is reasonable but indicates that the income and expenditure over the four year period will be equal. This is very unlikely and raises some concern over the viability of the figures provided.	Score	1/2
Do they have at least one year's running costs in reserve?		
The organisation has £93,200 in reserves and their expenditure up to 31 March 2016 was £89,346.	Score	2/2
Have they covered their costs for the last two years?		
The organisation made a very small profit in 2014-15 and a loss of £25,589 in 2015-16.	Score	1/2
What are their other funding sources?		
The organisation has identified sources of funding of £55,261 but none are yet secured.	Score	1/2
Evidence of local need		
Community Safety Team Leader: There is strong evidence of local need (suggested score 2 points). Equality Officer: Whilst the evidence of need provided is limited, the number of referrals indicates there is a clear need (suggested score 2 points). Grants Officer: Some evidence of local need but with reduced children's centre provision the demand will increase.	Score	2/2
Working with our corporate priorities		
Community Safety Team Leader: There is a strong contribution to our thriving communities and to our equality objectives (suggested score 2 points). Equality officer: The service offers high levels of contribution to our equality objectives (suggested score 2 points). Grant Officer: This service contributes to a number of actions within our 'thriving communities' priority and to the equality objective around helping to deliver better outcomes for disadvantaged groups.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation's operating model is reliant on volunteers and they have a policy in place.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Community Safety Team Leader: I would like more information about their volunteer training, referral figures and links with other support organisations but feel they meet the need identified well (suggested score 2 points). Equality officer: There is significant evidence that this is a strong solution to the need (2	Score	2/2

points).			
How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Yes, I strongly support the service this organisation provides (suggested score 2 points). Grants officer: Support from local health and social workers, children's centres, midwives and many others.		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets seem reasonable but there is no growth in them over the four year period which is concerning, as the grant request shows a large reduction in years two and three.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
The draft strategic plan for 2016-19 provided seems reasonable and achievable.		Score	2/2
What is the funding for?			
The funding will allow them to continue their service and increase the number of beneficiaries in South Oxfordshire.		Score	1/2
Total score	23/26	Recommended Grant	£66,706

Applicant responses

<p>How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?</p>	<p>Home-Start has been based in Didcot delivering our services across southern Oxfordshire for over 27 years. We have a proven track record of offering appropriate support to vulnerable families in the area. When funding has been available, we have been able to expand our services to meet more of the identified need. The limited funding that we currently have is targeted towards specific families such as Military Families, those with Post Natal Illness who attend our Group, and outreach from one Children's Centre. We have had funding in the past to cover deprived local communities, urban deprivation and the broad range of towns and villages throughout southern Oxfordshire. We receive referrals for families requiring our support, from: Health Visitors; Children's Centres; Social Services; Home-School Link Workers; Early Intervention Service; Domestic Abuse Service and we welcome self referrals from families themselves. When we have been able to offer support in these areas we then become involved with other organisations working with families and initiatives such as Child Protection; Team around the Child; Complex Needs etc,. Referrers are aware of our limited service, but continue to contact us in the hope that support is available. In the past three months we have received 15 referrals that we are unable to accept. There will be many more that have not been referred to us because of our known situation. We are forwarding two letters of support and could send many more if you require them. The only thing that is limiting the services we can offer to our families is lack of funding. The funding we have requested is based on historical information regarding the cost of providing our services and the number of families we are able to support within that funding. We have tapered the annual request on the expectation that we will be able to find funding from other organisations in the future. The need as mentioned above, particularly with the rapidly expanding area of Great Western Park, Didcot, can only increase. We have recently undertaken a survey amongst referrers which is attached. An example of one referred family we have currently been unable to accept is a family where four agencies have asked for our service. The family has recently moved in to an isolated area, with no transport. They have a 5 year old child with Cerebral Palsy, an 18 month old child with hearing impairment and 2 month old twins who were born 8 weeks prematurely. The family have no local support and are struggling to attend medical appointments. It is heartbreaking that it is only lack of financial support that prevents us from helping this and many other families from receiving our unique services. We have been working with the Children's Centres, providing outreach and other services. With their imminent closure, the demand for our service will, and is already, increasing.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Our home-visiting service is unique within the District. There is no other service offering direct support to families with young children in their own homes, using volunteers. We have a proven track record in recruiting and retaining suitable volunteers, and matching them to the needs of the families identified above. We have an excellent working relationship with referrers who have identified the need for our services.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Home-Start Southern Oxfordshire is a unique service available to families who have at least one child aged under 5 years. The main beneficiaries of the project would not be just the children under 5, but the parents, other children, the wider family, the volunteers and indirectly the wider community. Parents will benefit by the reduction in family isolation and an increase in social networks. Home-Start can strengthen parent/child relationships, improve parents' physical health and emotional well-being. We can help families connect with other services they may have difficulty in reaching or engaging with, such as health, community services, housing, and education. Volunteers can accompany families to appointments if transport is difficult or if they simply need support. Children benefit by becoming happier, more confident, better prepared for nursery and school. Volunteers will benefit by being able to offer and give something back to their local community, this is often a stepping stone into further education or employment. By allowing the families to engage with aspects of the local community, this will encourage community cohesion and support groups to develop within the local community for these families. We work in collaboration with other local Home-Start schemes</p>

Applicant's financial forecast - Home-Start Southern Oxfordshire

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£93,447	£93,447	£93,447	£93,447	£93,447
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)					
	Training and development (all staff and volunteers)		£500			
	Expenses	1500	£1,515	£1,530	£1,545	£1,561
	Agency fees and other related employment costs					
	Staff: Senior Organiser (P/T)	5602	5659	5715	5772	5830
	Staff: Organiser 1 (P/T)	13755	13893	14031	14172	14314
	Staff: Organiser 2 (P/T)		12136	12258	12380	12504
	Staff: Group Worker (P/T)	4979	5029	5079	5130	5181
	Staff: Office Manager (P/T)	13242	13374	13508	13643	13779
	Admin Assistant (P/T)	3970	4009	4049	4089	4131
Building costs	Rent/mortgage (new OCC charge from 1st April 2017)		£7,750	£7,828	£7,906	£7,985
	Business rates					
	Gas					
	Water					
	Electricity					
	Service charge - a share of running/maintenance costs	£3,500	£3,535	£3,570	£3,606	£3,641
Services	Total					
	Waste collection/disposal					
	TV license/packages					
	Wi-Fi/broadband					
	Phone Line	£1,612	£1,628	£1,644	£1,661	£1,677
	Building maintenance					
	Cleaning					
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
Supplies, equipment and consumables	Stationery and postage	£1,773	£1,791	£1,809	£1,827	£1,845
	ICT development					
	Meetings costs (conference rooms, catering etc etc)					
	Publicity and marketing (design, print and photocopying)					
	Furniture, equipment and maintenance	£500	£505	£510	£515	£520
Professional costs	Building Insurance					
	Trustee Insurance					
	Public/Employee Liability & Personal Accident	£611	£617	£623	£630	£636
	Professional fees (accountants, legal, HR etc)	£50	£50	£50	£50	£50
Other costs	Volunteer Training / Travel Expenses	£5,000	£5,050	£5,101	£5,151	£5,203
	Home-Start UK Consultancy Fee	£1,043	£1,427	£1,432	£1,446	£1,461
	AGM costs	£400	£404	£408	£412	£416
	Childrens Christmas Party	£400	£404	£408	£412	£416
Total Expenditure (B)		£57,937	£79,276	£79,553	£80,347	£81,150
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)					
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	Grants from local councils, agencies, government bodies	£2,000	£2,020	£2,040	£2,061	£2,081
	Grants from philanthropic foundations/organisations	£10,000	£10,100	£10,201	£10,303	£10,406
	Fundraising income from community / events	£500	£505	£510	£515	£520
	Other donations	£20,769	£17,818	£17,576	£30,094	£36,682
	Royal British Legion	£15,000	£15,150	£15,302	£15,455	£15,609
	BBC Children In Need	£9,668	£9,668	£9,668	£9,668	£9,668
SODC Grant		£24,015	£24,256	£12,251	£6,184	
Other income	Income from interest on reserves, endowment funds etc					
Total Income (C)		£57,937	£79,276	£79,553	£80,347	£81,150
Balances at year end (i.e. line A - line B + line C)		£93,447	£93,447	£93,447	£93,447	£93,447

Applicant's project delivery/development plan - Home-Start Southern Oxfordshire

Project Delivery and Development Plan

Standards and Methods of Practice

. Home-Start works with families who are experiencing difficulties or suffering stress and who have at least one child under five years of age. These families are offered support in their own homes by volunteers for as long as is necessary.

. Each Home-Start scheme is an independent voluntary organisation which works towards the increased confidence and independence of the family by:

- offering support, friendship and practical assistance
- visiting families in their own homes, where the dignity and identity of each individual can be respected and protected
- reassuring parents that difficulties in bringing up children are not unusual and encouraging enjoyment in family life
- developing a relationship with the family in which time can be shared and understanding can be developed; the approach is flexible to take account of different needs
- encouraging the parents' strengths and emotional well-being for the ultimate benefit of their own children
- encouraging families to widen their network of relationships and to use effectively the support and services available within the community.

We receive referrals from agencies such as:

- Health Visitors;
- Social Workers;
- Home-School Link Workers;
- Army Welfare & SSAFA
- Domestic Abuse Service;
- Didcot Women's Refuge;
- Oxfordshire County Council, Speech and language Service;
- Children's Centres;
- Midwives;
- Families can also refer themselves.

We have 27 years of experience of working with families and have robust measurement and Quality Assurance control procedures in place, to ensure that we can deliver our planned services in the most effective way to meet our families' needs.

Our other funding sources vary from year to year with applications to large funders - such as BBC Children in Need and the National Lottery, grants from local town and parish councils; as well as numerous small grant giving trusts and individuals. Most of these are for a single year.

We are constantly seeking opportunities for collaborative working and have worked closely with the Children's Centres in the past. With the closure of many Children's Centres we will look at ways of providing services to help the families who have additional needs as a result of this loss of service. We have specific funding to work with military families and work closely with Welfare Officers.

There is a continuity of Home-Start service for families who move from one area to another, and asked to be referred on to another Scheme for support.

A new opportunity has arisen for us to work in collaboration with a local business, we will offer their staff lone worker/personal safety training based on Home-Start standards, in return for their funding support. We hope to offer this training to other businesses and community groups in the area.

We will try to identify other groups who are providing complementary services, such as the Didcot based Balsam Family Project to see if we can set up any collaborative working.

In particular we are aware of the dramatic increase in the number of families moving into new accommodation in Didcot, particularly Great Western Park, many of whom are in social housing with young families often isolated from family and friends and in need of our services.

Our intention is to use the SODC grant to resource the SODC area with additional Organiser time and volunteers to try to meet the above identified needs.

We are sending a copy of our Strategic Plan for 2016-19, which although in early DRAFT form, gives further information, on pages 3 & 4, about the Community Profile that we are supporting; and, throughout the document, on the way we deliver our services.

We are also sending a copy of South Oxfordshire population growth projection which we will be supporting. This is taken from Insight.oxfordshire.gov.uk website.

Community First Oxfordshire		Ref	SRev\10
Community mobilisation service - Advice and support on activities including community transport management, community hall management, rural shop and pub management, community led plans and action.			
Total cost (over four years)	£282,892	Amount requested (over four years)	£74,250
Previous grants: Revenue grant for core costs £72,219 between 2013/14 – 2016/17 (average grant £18,055/year) Revenue grant for core costs £187,133 between 2006/7 and 2012/13 (average grant £26,733/year)			

District ward areas covered:

All areas

Scoring

Does the grant reduce each year?		
The grant reduces very slightly year on year for the four-year period.	Score	1/2
Long term financial plan		
A financial plan for the cost of the service being provided in South Oxfordshire is provided and appears comprehensive and achievable.	Score	2/2
Do they have at least one year's running costs in reserve?		
The organisations reserves are in line with its reserves policy.	Score	1/2
Have they covered their costs for the last two years?		
The organisation has made a loss in the last two years (£57,244 in 2015 and £72,209 in 2016).	Score	0/2
What are their other funding sources?		
The organisation has identified some other sources of funding with a very small amount being secured.	Score	1/2
Evidence of local need		
Economic Development: (relating to the shops/pub officer work): There is medium evidence of need within the application, but it is out of date (suggested score 1 point). Corporate Projects Officer: Lots of current and relevant evidence of need in the community, including our own corporate plan (suggested score 2 points).	Score	2/2
Working with our corporate priorities		
Economic Development: (relating to the shops/pub officer work) - medium levels of contribution to 'Investing in the District's Future' (suggested score 1 point). Corporate Projects Officer: High levels of contribution to a number of our priorities including thriving communities, services for residents and investing in the districts future (suggested score 2 points). Grant officer: This service contributes significantly to our 'thriving communities' priority.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
Corporate Projects Officer: Their volunteering policy looks strong and comprehensive. They encourage volunteering in the community. They use occasional volunteers themselves and have a small team of community ambassadors (suggested score 2 points).	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Economic Development: (relating to the shops/pub officer work) I'm confident this is the best service to meet the need based on their experience and knowledge (suggested score 2 points). Corporate Projects Officer: They are already established with lots of community groups and are well placed to work on volunteering schemes as they have been contracted by Oxfordshire County Council (via OCVA) to deliver a volunteering/community support project	Score	2/2

across the county (suggested score 2 points).			
How well do other agencies / council staff support the service this organisation provides?			
Economic Development: (relating to the shops/pub officer work) good levels of support for this service and organisations - their work is complimentary to our service (suggested score 1.5 points). Corporate Projects Officer: Very strong support for the organisation and this service (suggested score 2 points).		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The suggested targets cover four areas of work; rural transport, community halls, rural retail and community led planning, which seem reasonable.		Score	2/2
How achievable/reasonable is their project delivery/development plan?			
The business plan is comprehensive and appears deliverable.		Score	2/2
What is the funding for?			
The funding is to continue the existing services in South Oxfordshire.		Score	1/2
Total score	22/26	Recommended Grant	£74,250

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>The 2012 South Oxfordshire Core Strategy noted, in relation to services in rural communities:</p> <p>'There are shops and post offices in some of these rural settlements but many face economic problems which can lead to closure. They are an important part of community life and provide an essential service for some residents.</p> <p>Services have declined in many villages and there is concern that some settlements will increasingly become just places for commuters to sleep. Our monitoring shows that in 1991, 42 parishes had a food shop but by 2008 this had decreased to 31. In the same period, the number of parishes with a petrol filling station fell from 29 to 15, and with a GP surgery from 19 to 12.</p> <p>A number of parishes have produced parish plans, which local people see as key to being able to influence the future of their communities. Our review of all the recent parish plans shows that maintaining existing services and facilities as well as providing new ones is a strong priority. Many people also recognise the need for more affordable housing, but there is some concern about levels of future housing growth threatening the character and appearance of villages.</p> <p>Transport in rural areas is an issue and unsurprisingly South Oxfordshire has high levels of car ownership. In 2001, 46.9 per cent of households had two or more cars compared to the South East average of 27.9% and the England average 37.9%.'</p> <p>In July 2016 Oxfordshire County Council withdraw subsidies paid to run 118 subsidised bus routes in Oxfordshire, as a result many rural bus services have ceased operation.</p> <p>The 2011 Census showed that a small minority (3.9%) of Oxfordshire's population lived in a rural hamlet or isolated dwelling. However, around four in ten of those people lived in South Oxfordshire (40.1%). In comparison just over a quarter lived in West Oxfordshire (26.8%) whilst one in five were in Vale of White Horse (20.8%) and about one in ten were in Cherwell (11.5%).</p> <p>According to the Office for National Statistics Mid-2014 Population Estimate 27,300 people, 19.9% of South Oxfordshire's population, were aged 65 and over; 3,800,</p>

	<p>2.7% of South Oxfordshire's population were aged 85 and over.</p> <p>The 2011 Census showed that proportionately more of those aged 65 and over in South Oxfordshire were living in rural areas (41.5%) than the county average (33.4%). The DEFRA 2013 Rural Ageing Research Report suggests that older people living in rural areas fare better than their urban counterparts on several determinants of health and wellbeing. However, the report finds that older people in rural areas are likely to have some specific needs, including around transport and housing; these may present a growing challenge as the older population increases. The 2011 Census also showed that 26.9% of people aged 65 in South Oxfordshire lived alone.</p> <p>CFO works to support community led solutions to the reduction in services, helping to address the challenges that these reductions create.</p> <p>Please see also see the appended business plan</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>In the SODC Corporate Plan 2016-2020 the Leader of the Council and the Cabinet member for the Corporate Plan comment 'We know that one thing that has hurt rural communities is the loss of their last bus services, and we are looking at what we can do to help those communities to maintain vital transport links.' CFO is the only organisation in Oxfordshire that offers specialist community transport advice and support. It is working with South Oxfordshire community transport schemes to address the issues resulting from the loss of bus services.</p> <p>CFO's advice and support for community halls, rural shops and pubs and community led planning also contributes to the council's priority of building thriving communities and improving the lives of residents.</p> <p>The corporate plan makes support for communities to help themselves a priority. CFO's mission is 'to help communities help themselves'. All our services and activities are designed to be community led, with community plans and decisions made locally rather than remotely.</p> <p>One way that the council will support communities to help themselves is by helping to increase the number of people volunteering in the district. CFO is already helping to support an estimated 1,100 volunteers in South Oxfordshire.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>South Oxfordshire communities, as a whole, will benefit from the advice and support that CFO offers. In particular, the following community groups and volunteers will directly benefit from our advice and support:</p> <ol style="list-style-type: none"> 1. existing community transport schemes (26 schemes with an average 15 volunteers) = 390 volunteers 2. community building committees (78 community buildings with an average 6 committee members) = 468 volunteers 3. individuals, community groups and organisations will benefit from improved volunteering support in the district 4. Communities with community shops (there are 6 community shops with an estimated 35 volunteers = 210 volunteers) or those thinking about starting a community enterprise will benefit. The community members will benefit from direct access to shopping and other services from both community shops and independent retail shops 5. Parish and town councils will receive direct support from CFO to ensure that appropriate community actions are effectively implemented with council backing – we will work with at least 10 parishes each year (10 groups with an average 10 volunteers) = 100 volunteers

Applicant's financial forecast - Community First Oxfordshire

Balance at start of year (A) (include savings and reserves)		£0	£5,778	£9,022	£6,922	£2,701
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)					
	Director	£10,395	£10,665	£10,932	£11,161	£11,385
	Director	£10,395	£10,665	£10,932	£11,161	£11,385
	Office manager	£6,923	£7,103	£7,281	£7,434	£7,583
	Community development worker	£8,437	£8,657	£8,873	£9,059	£9,241
	Community development worker	£6,006	£6,162	£6,316	£6,449	£6,578
	Community development worker	£5,660	£5,807	£5,952	£6,077	£6,198
	Training and development (all staff and volunteers)	£250	£257	£263	£268	£274
	Expenses	£3,000	£3,078	£3,155	£3,221	£3,286
	Agency fees and other related employment costs	£1,500	£1,539	£1,577	£1,611	£1,643
Building costs	Rent, rates, water, heat, power, cleaning	£3,750	£3,848	£3,944	£4,027	£4,107
Services	Phone and IT	£750	£770	£789	£805	£821
Supplies, equipment and consumables	Stationery, printing and postage	£3,000	£3,078	£3,155	£3,221	£3,286
	Subscriptions	£1,250	£1,283	£1,315	£1,342	£1,369
	Meetings costs (rooms, catering etc etc)	£250	£257	£263	£268	£274
	Furniture, equipment and maintenance	£100	£103	£105	£107	£110
Professional costs	Building Insurance	£0	£0	£0	£0	£0
	Trustee Insurance	£100	£103	£105	£107	£110
	Public/Employee Liability & Personal Accident	£350	£359	£368	£376	£383
	Professional fees (accountants, legal, HR etc)	£4,000	£4,104	£4,207	£4,295	£4,381
Other costs	Governance costs	£500	£513	£526	£537	£548
	Total Expenditure (B)	£66,616	£68,348	£70,057	£71,528	£72,959
			£1,0260	£1,0250	£1,0210	£1,0200
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£4,500	£4,617	£4,732	£4,832	£4,928
	Earned income (neighbourhood planning fees, place-making)	£20,000	£16,000	£10,000	£8,000	£5,000
	Earned income (commissions, consultancy/training fees)	£5,250	£6,000	£8,500	£10,000	£12,500
Donations, grants and fundraising	Grants from local councils - SODC	£16,669	£19,000	£18,750	£18,500	£18,000
	Grants from local councils - Oxfordshire County Council	£12,875	£12,875	£12,875	£12,875	£12,000
	Grants from central government - DEFRA (via ACRE)	£12,500	£12,500	£12,500	£12,500	£12,500
	Grants from philanthropic foundations/organisations	£0	£0	£0	£0	£0
	Fundraising income from community / Other donations	£0	£0	£0	£0	£0
Other income	Income from interest on reserves, endowment funds etc	£600	£600	£600	£600	£600
	Total Income (C)	£72,394	£71,592	£67,957	£67,307	£65,528
	Balances at year end (i.e. line A - line B + line C)	£5,778	£9,022	£6,922	£2,701	-£4,729

Applicant's project delivery/development plan - Community First Oxfordshire

Business plan

1. Introduction

Community First Oxfordshire (CFO) carries on the work of Oxfordshire Rural Community Council (ORCC), which was founded in 1920 – the first rural community council in England.

Community First Oxfordshire follows the example of many other Rural Community Councils (RCCs) that have found that their skills and expertise can benefit urban as well as rural communities. Our mission is 'to help communities help themselves'. We support communities across Oxfordshire to prepare their own action plans, recruit local volunteers and provide their own services and facilities.

2. The need in South Oxfordshire

The [2012 South Oxfordshire Core Strategy](#) noted, in relation to services in rural communities:

'There are shops and post offices in some of these rural settlements but many face economic problems which can lead to closure. They are an important part of community life and provide an essential service for some residents.

Services have declined in many villages and there is concern that some settlements will increasingly become just places for commuters to sleep. Our monitoring shows that in 1991, 42 parishes had a food shop but by 2008 this had decreased to 31. In the same period, the number of parishes with a petrol filling station fell from 29 to 15, and with a GP surgery from 19 to 12.

A number of parishes have produced parish plans, which local people see as key to being able to influence the future of their communities. Our review of all the recent parish plans shows that maintaining existing services and facilities as well as providing new ones is a strong priority. Many people also recognise the need for more affordable housing, but there is some concern about levels of future housing growth threatening the character and appearance of villages.

Transport in rural areas is an issue and unsurprisingly South Oxfordshire has high levels of car ownership. In 2001, 46.9 per cent of households had two or more cars compared to the South East average of 27.9% and the England average 37.9%.'

In July 2016 Oxfordshire County Council withdraw subsidies paid to run 118 subsidised bus routes in Oxfordshire, as a result many rural bus services have ceased operation.

The [Oxfordshire Joint Strategic Needs Assessment Annual Report 2016](#) provides relevant information about South Oxfordshire's rural population and in particular older people in rural areas. The 2011 Census showed that a small minority (3.9%) of Oxfordshire's population lived in a rural hamlet or isolated dwelling - a proportion broadly comparable with the South East (4.1%) and England overall (3.1%). However, around four in ten of

those people lived in South Oxfordshire (40.1%). In comparison just over a quarter lived in West Oxfordshire (26.8%) whilst one in five were in Vale of White Horse (20.8%) and about one in ten were in Cherwell (11.5%).

According to the Office for National Statistics Mid-2014 Population Estimate 27,300 people, 19.9% of South Oxfordshire's population, were aged 65 and over; 3,800, 2.7% of South Oxfordshire's population were aged 85 and over.

The 2011 Census showed that proportionately more of those aged 65 and over in South Oxfordshire were living in rural areas (41.5%) than the county average (33.4%). The DEFRA 2013 Rural Ageing Research Report suggests that older people living in rural areas fare better than their urban counterparts on several determinants of health and wellbeing. However, the report finds that older people in rural areas are likely to have some specific needs, including around transport and housing; these may present a growing challenge as the older population increases. The 2011 Census also showed that 26.9% of people aged 65 in South Oxfordshire lived alone.

3. South Oxfordshire's priorities

South Oxfordshire District Council's Corporate Plan 2016-2020 will help to build thriving communities that people want to be proud of, and seeks to improve the lives of residents. The Leader of the Council and the Cabinet member for the Corporate Plan comment 'We know that one thing that has hurt rural communities is the loss of their last bus services, and we are looking at what we can do to help those communities to maintain vital transport links.' CFO is the only organisation in Oxfordshire that offers specialist community transport advice and support, and we are already working with a number of South Oxfordshire community transport schemes to address the issues resulting from the loss of bus services.

CFO's advice and support for community halls, rural shops and pubs and community led planning also contributes to the council's priority of building thriving communities and improving the lives of residents.

The corporate plan also makes support for communities to help themselves a priority. CFO's mission is 'to help communities help themselves' and all our services and activities are designed to be community led, with community plans and decisions made locally rather than remotely.

One way that the council will support communities to help themselves is by helping to increase the number of people volunteering in the district. CFO, through its work with communities in South Oxfordshire is already helping to support an estimated 1,100 volunteers.

One of CFO's corporate aims is to 'empower everyone in communities on an equal and inclusive basis'. Therefore, in planning and delivering our services we support the council's overall commitment to 'Provide fair and accessible services and employment opportunities that meet the needs of everyone, and positively promote inclusion, in line with the Equality Act.'

4. Current support provided by CFO in South Oxfordshire

Oxfordshire Rural Community Council (now CFO) was awarded a revenue grant of £72,219 by South Oxfordshire District Council for the period 2013-2017. This grant funding has enabled CFO to proactively support and mobilise communities across South Oxfordshire, focusing on:

- Advice and information to enable community transport schemes to be retained or new ones created; including support for a new voluntary car driver scheme in Garsington, support for a new mini-bus for Chalgrove Age Concern, advice for Watlington Voluntary Drivers, Benson Helpline, FISH Volunteer Centre, Wallingford Volunteer Centre, Henley Volunteer Bureau
- Advice and information to support the operational needs of running and improving a community hall; including support for halls in Stadhampton, Benson, Chalgrove, Elsfield, Horton, Lewknor, Didcot
- Advice and information to support the operational needs of running and improving a rural shop; including support for shops in Horspath, the Talking Shop Sandford on Thames, South Stoke, Checkendon PO, Brightwell-cum-Sotwell community shop
- Support for the preparation and implementation of community led plans; including support for community led plans for Berinsfield, Binfield Heath, Burcot and Clifton Hampden, Culham, Garsington, Howe Hill, Little Milton, Shiplake, South Stoke, Tetsworth, Waterperry, Waterstock

The availability of funding to support community led plans has enabled the CFO community development team to identify parishes that are interested in neighbourhood planning. CFO is currently providing (or has provided) neighbourhood planning support to Warborough, Watlington, Benson, Long Wittenham, Chalgrove, Baldons and Wheatley.

5. Additional support to be provided by CFO from 2017 to 2021

In the next four years CFO will continue to provide all the support in South Oxfordshire that it has provide in the last four years, but in response to increasing concerns about service reductions and their impact on communities, CFO is looking to provide additional support. It is intended that elements of this support will generate income for CFO. This will reduce CFO's need for council funding to provide support in South Oxfordshire. CFO recognises the need to provide value for money services. Additional services being offered or being planned include:

Community transport advice and support - A minibus sharing scheme which brokers the 'downtime' of minibuses owned by local community organisations to other local groups needing access to affordable group transport.

Based on similar well-established projects in Gloucestershire and Wiltshire, the scheme works by taking care of all the business of making minibuses available to the community (such as legal issues, vehicle bookings, driver arrangements and billing) before passing a fee to vehicle lenders after each journey which can be put towards vehicle running and replacement costs.

Community halls, shops and pubs advice and support – CFO is already offering Portable Appliance Testing (PAT) training and testing equipment. This service is proving very popular and whilst training fees and equipment hire charges are modest, the service is generating an increasing amount of income.

CFO has also worked with Trust for Oxfordshire's Environment (TOE2) to fund energy audits for community halls. An extension to this area of work will be the recommendation of an energy broker who can reduce the cost of gas and electricity. CFO will receive a commission if the energy broker can reduce a hall's energy bills.

Community led planning and action advice and support - Town and parish councils are under pressure to meet the needs of their communities but very few town and parish councils have the skills and expertise needed to manage services that are being reduced. CFO is working with sister organisations across England, to provide a service that will support town and parish councils who want to take over services that are being reduced. Support will be provided with planning, procurement and management, including the recruitment of staff and volunteers as appropriate.

There will be a renewed emphasis on community mobilisation/action, as well as planning. Oxfordshire County Council via Oxfordshire Community and Voluntary Action (OCVA) is funding CFO until 2019/19 to carry out community audits in order to understand the needs of local communities in target areas, and identify gaps and opportunities to access local and external resources to meet those needs, work with local people, OCVA and other partners to achieve community-focused solutions

Income will be generated in the form of a consultancy fee or management charge for supporting town and parish councils that want to take over local services and facilities.

Income will also be generated from CFO's support from for neighbourhood planning and CFO is looking to expand its place-making activity. The challenge is how to turn new residential developments into thriving, active and successful communities where people have a positive sense of belonging. CFO wants to work with communities, local planning authorities and developers to make sure the right kind of social and community amenities are in place. The Land Trust has already indicated that it wants to work in partnership with CFO at Great Western Park.

6. The support CFO will deliver in South Oxfordshire from 2017 to 2021

CFO will continue to proactively support and mobilise communities across South Oxfordshire. We will use our team of specialist advisers and community development workers who to deliver the following annual activity.

Community transport advice and support

1. Advising and supporting new and existing community transport schemes via general emails, information sheets, newsletters training events and forums
2. Providing email/phone/face to face advice on specific matters e.g. governance, fund-raising, operational management, insurance
3. Signposting residents in need to appropriate community transport schemes
4. Administering the OCTA badge hospital parking permit scheme for South Oxfordshire community transport schemes
5. Administering Transport Impact Funds on behalf of Oxfordshire County Council and promoting fund availability in South Oxfordshire
6. Updating the Oxfordshire Community Transport Directory
7. Setting up and managing a vehicle sharing brokerage for South Oxfordshire community transport schemes

Contribution to South Oxfordshire District Council's corporate priorities:

- Support rural communities with maintaining their transport links by working with bus operators to look at options to continue some of the bus services previously supported directly by Oxfordshire County Council.
- Provide additional support to voluntary and community groups to help them to find the volunteers they need, to provide vital services to residents
- Increase the number of people volunteering in the district.

Main collaborative partners	Nature of joint working
South Oxfordshire community transport (CT) schemes	CFO advising, supporting, promoting CT schemes
Oxford Health NHS Trust	CFO administering car park concessions, signposting Trust to volunteer driver schemes
Oxford University NHS Trust	CFO administering car park concessions, signposting Trust to volunteer driver schemes
Community Transport Association (CTA)	CTA providing policy and legislation advice, sharing best practice, promoting importance of CT at national level; CFO feeding back best practice examples
Age UK Oxfordshire (AUKO)	AUKO providing DBS checks, identifying need; promoting schemes to residents in need
Oxfordshire County Council (OCC)	OCC providing small grants for starting up schemes and training; CFO administering start up grants; CFO updating the Oxfordshire CT directory
Oxfordshire Community and Voluntary Action (OCVA)	OCVA helping to recruit CT volunteers
Volunteer Link-Up	Volunteer Link-Up helping to recruit CT volunteers and advising on CT schemes providing
South Oxfordshire DC policy and partnerships team	CFO working with the policy and partnerships team to promote CT volunteering

Community halls advice and support

1. Advising and supporting community halls via general emails, information sheets, newsletters training events and forums.
2. Providing email/phone/face to face advice on specific matters e.g.: governance, fund-raising, operational management, refurbishment, insurance, energy costs
3. Training and equipment for PAT testing

Main collaborative partners	Nature of joint working
South Oxfordshire community hall management committees	CFO advising, supporting, promoting halls
South Oxfordshire town and parish councils	CFO advising, supporting in relation to their support for halls
Trust for Oxfordshire's Environment (TOE2)	TOE2 funding energy audits, CFO promoting audits
ACRE Network (national network of rural community councils)	ACRE providing policy and legislation advice, sharing best practice, promoting importance of halls at national level; CFO feeding back best practice examples
South Oxfordshire DC policy and	CFO working with the policy and

partnerships team	partnerships team to promote community hall management volunteering
Oxfordshire Community and Voluntary Action (OCVA)	CFO working with OCVA to promote community hall management volunteering

Contribution to South Oxfordshire District Council's corporate priorities:

- Provide additional support to voluntary and community groups to help them to find the volunteers they need, to provide vital services to residents
- Increase the number of people volunteering in the district.

Rural retail advice and support

1. Advising and supporting community and independent village shops and pubs via general emails, information sheets, newsletters and forums.
2. Providing email/phone/face to face advice on specific matters e.g.: management, fund-raising, operations advice, refurbishment, insurance

Contribution to South Oxfordshire District Council's corporate priorities:

- Supporting the creation of an environment that allows enterprising small and medium sized businesses to grow.
- Championing our small and medium sized businesses in South Oxfordshire.
- Provide additional support to voluntary and community groups to help them to find the volunteers they need, to provide vital services to residents
- Increase the number of people volunteering in the district.

Main collaborative partners	Nature of joint working
South Oxfordshire rural shops and pubs	CFO advising, supporting, promoting shops and pubs
South Oxfordshire DC economic development team	ED team signposting rural shops and pubs to CFO
ACRE Network (national network of rural community councils)	ACRE providing policy and legislation advice, sharing best practice, promoting importance of rural shops and pubs at national level; CFO feeding back best practice examples
Plunkett Foundation	CFO promoting specialist initiatives such as 'the pub is hub'
South Oxfordshire DC policy and partnerships team	CFO working with the policy and partnerships team to promote community shop/pub volunteering
Oxfordshire Community and Voluntary Action (OCVA)	CFO working with OCVA to promote community shop/pub volunteering

Community led planning and community action advice and support

1. Promoting the value of having a community led plan and/or neighbourhood plan (annual information/training event for whole county)
2. Using the community audits funded by Oxfordshire County Council to identify need for support in implementing community led solutions

3. Providing email/phone/face to face information and advice on how to produce a community led plan and/or neighbourhood plan
4. Revisiting completed community led plans to ascertain progress and offer advice/support to progress stalled action
5. Setting up and managing a support service for town and parish councils taking over services and facilities.

Contribution to South Oxfordshire District Council's corporate priorities:

- Engage with residents on issues, services or projects which affect them, and consider their views in making decisions.
- Investigate opportunities for increasing the role of parish councils in hyperlocal issues.
- Maintain a close dialogue with town and parish councils in order to understand the issues they face, and where possible work with them to find solutions.
- Strongly supporting the development of neighbourhood plans for our towns and villages.
- Provide additional support to voluntary and community groups to help them to find the volunteers they need, to provide vital services to residents.
- Increase the number of people volunteering in the district.

Main collaborative partners	Nature of joint working
South Oxfordshire town and parish councils/OALC	CFO advising, supporting in relation to their support for community-led and neighbourhood plans and support for implementing the actions from community led plans
South Oxfordshire DC policy and partnerships team	CFO working with the policy and partnerships team to promote community action and volunteering
ACRE Network (national network of rural community councils)	ACRE providing policy and legislation advice, sharing best practice, promoting importance of community led planning and a support service for town and parish councils, at national level; CFO feeding back best practice examples
Oxfordshire County Council (OCC)	OCC funding via OCVA, CFO to carry out community audits to understand the needs of local communities in target areas, and identify gaps and opportunities to access local and external resources to meet those needs, work with local people, OCVA and other partners to achieve community-focused solutions
Oxfordshire Community and Voluntary Action (OCVA)	OCVA helping to recruit volunteers and voluntary sector partners needed to successfully implement community led solutions
South Oxfordshire DC planning team	CFO working with the planning team to support the preparation of neighbourhood plans
Planning Aid	Planning Aid providing policy and

	legislation advice, sharing best practice, promoting importance of neighbourhood planning at national level; CFO feeding back best practice examples
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7. Targets, outcomes and monitoring 2017-2021

It is recommended that SODC review the following targets and outcomes with CFO on a yearly basis, to make sure that they remain relevant to the needs of SOC residents and the priorities of SODC.

Community transport advice and support

SODC priority	Activity	Output and outcome performance indicators and annual targets	Monitoring frequency
Support communities to help themselves. - Support rural communities with maintaining their transport links	Advising and supporting new and existing community transport schemes via general emails, information sheets, newsletters training events and forums	12 general update emails	Quarterly
		2 information sheets	Annual
		4 newsletters	Annual
		1 information forum/training event	Annual
		Level of service satisfaction (measured by survey)	Annual
Support communities to help themselves. - Support rural communities with maintaining their transport links	Providing email/phone/face to face advice on specific matters e.g. governance, fund-raising, operational management, insurance	Advice on at least 25 separate specific matters	Quarterly
		At least one application to the OCC transport impact fund	Annual
		Level of service satisfaction (measured by survey)	Annual

Community halls advice and support

SODC priority	Activity	Output and outcome performance Indicators and annual targets	Monitoring frequency
Support communities to help themselves. - Provide additional support to voluntary and community groups	Advising and supporting community halls via general emails, information sheets, newsletters training events and forums	12 general update emails	Quarterly
		4 information sheets	Annual
		4 newsletters	Annual
		1 information forum/training event	Annual
		Level of service satisfaction (measured by survey)	Annual
Support communities to help themselves. - Provide additional support to voluntary and community groups	Providing email/phone/face to face advice on specific matters e.g. governance, fund-raising, operational management, insurance	Advice on at least 30 separate specific matters	Quarterly
		At least 4 successful hall improvement projects achieved with the help of CFO information/advice	Annual
		Level of service satisfaction (measured by survey)	Annual

Rural retailing advice and support

SODC priority	Activity	Output and outcome performance Indicators and annual targets	Monitoring frequency
Supporting the creation of an environment that allows enterprising small and medium sized businesses to grow	Advising and supporting community and independent village shops and pubs via general emails, information sheets, newsletters and forums	12 general update emails	Quarterly
		4 information sheets	Annual
		4 newsletters	Annual
		1 information forum/training event	Annual
		Level of service satisfaction (measured by survey)	Annual

Supporting the creation of an environment that allows enterprising small and medium sized businesses to grow	Providing email/phone/face to face advice on specific matters e.g.: management, fund-raising, operations advice, refurbishment, insurance	Advice on at least 15 separate specific matters	Quarterly
		At least 2 successful retail improvement projects achieved with the help of CFO information/advice	Annual
		Level of service satisfaction (measured by survey)	Annual

Community led planning and community action advice and support

SODC priority	Activity	Output and outcome performance Indicators and annual targets	Monitoring frequency
Support communities to help themselves. - Maintain a close dialogue with town and parish councils in order to understand the issues they face, and where possible work with them to find solutions.	Arranging an annual information event. Providing email/phone/face to face information and advice on how to produce a community led plan and/or neighbourhood plan	At least 2 communities supported to start a plan	Annual
		At least 4 communities supported through the planning process	Annual
		1 information forum/training event	Annual
		Level of service satisfaction (measured by survey)	Annual
Support communities to help themselves. - Maintain a close dialogue with town and parish councils in order to understand the issues they face, and where possible work with them to find solutions.	Revisiting completed community led plans to ascertain progress and offer advice/support to progress stalled action	At least 8 communities supported to maintain momentum, recruit volunteers and implement actions	Annual
		Level of service satisfaction (measured by survey)	Annual

Riverside Counselling Service		Ref	SRev\9
An affordable counselling service for individuals, couples and groups in the local communities, including a dedicated young people's service called The Space.			
Total cost (over four years)	£509,890	Amount requested (over four years)	£65,000
Previous grants: No previous grants			

District ward areas covered:

Watlington, Chalgrove, Berinsfield, Didcot West, Didcot South, Didcot North East, Cholsey, Benson & Crowmarsh, Wallingford, Goring, Kidmore End & Whitchurch, Sonning Common, Woodcote & Rotherfield, Henley-on-Thames

Scoring

Does the grant reduce each year?		
The grant reduces slightly year on year over the four-year period.	Score	1/2
Long term financial plan		
A detailed financial plan is provided, the costs increase considerably in 2017-18 when compared to those provided in the accounts for the year up to 29 February 2016.	Score	1/2
Do they have at least one year's running costs in reserve?		
The organisation has less than one year of running costs in reserve. No reserve policy is provided.	Score	0/2
Have they covered their costs for the last two years?		
The organisation has made surpluses over the last two years (£5,247 2015) and (£8,713 in 2016).	Score	2/2
What are their other funding sources?		
Funding sources are identified as being predominantly from fee paying clients (£89,980 estimated for 2017-18). Some other fundraising is planned but not yet secured.	Score	1/2
Evidence of local need		
Equality officer: There is a local need for this service (suggested score 2 points). Grants officer: The organisation has provided detailed information about the need for counselling services across Oxfordshire from NHS sources.	Score	2/2
Working with our corporate priorities		
Equality officer: The service offers medium levels of contribution to our equality objectives, but I have reservations around the affordability/pricing of their services, especially for young people (suggested score 1 point). Grants officer: The service offers some contribution to our equality objective to help deliver better outcomes for disadvantaged.	Score	1/2 (counts as 2 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation has provided its volunteering policy and has an active volunteer base.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Equality officer: This is a mid-way solution, but their payment/affordability policy may be preventing young people (and others) accessing their services (suggested score 1 point). Grants Officer: Third party evidence to support the work of the organisation is provided.	Score	2/2
How well do other agencies / council staff support the service this organisation provides?		
Letters of support received from two separate local GP's.	Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		

The targets proposed show large increases over the four year period which is in line with the proposed increase in costs and therefore considered reasonable.		Score	2/2
How achievable/reasonable is their project delivery/development plan?			
A comprehensive business plan is provided.		Score	2/2
What is the funding for?			
The funding will enable the organisation to continue their existing services in Henley and Wallingford and to expand into two new areas; Didcot and Berinsfield.		Score	2/2
Total score	21/26	Recommended Grant	£65,000

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

Adult Counselling: The service began in 1989 due to an identified unmet need for affordable counselling in the local community. From 1989-2009 3 volunteer counsellors saw 3-12 clients per week. During 2009 this rose to an average of 29 clients a week with 9 counsellors. Currently there are 30 counsellors seeing over 100 individuals weekly, reflecting the growing need. The NHS has long waiting lists and even then offers only 6 weeks of counselling to those with mild to moderate mental health issues, which is rarely sufficient. Private counselling is more readily available, but not affordable for everyone. Our service is unique in the SODC area, providing professional counselling with little or no wait, at a minimal cost, to those who are most in need.

A recent MIND survey on NHS mental health provision states that: "One in 5 of those surveyed have waited over a year for treatment and one in 10 had been waiting over two years.

Waiting times can have a devastating impact on a person's life. They can exacerbate mental distress and cause relationships to break down, jobs to be lost, people to be isolated. But far too many people are still waiting far too long to receive treatment."

As a client recently said:

"You have to fight and fight to get access, so when I heard that I could be seen by a counsellor at Riverside in just a couple of weeks, I felt at last, someone has heard me!"

Young People's Counselling: The specific need for mental health provision for young people has been well documented in recent research. In response to increased demand, we established 'The Space', which works specifically with young people from the age of 12.

Studies suggest that approximately one in five young people has mental health difficulties. The number of young people hospitalised for self-harm in England has increased by 68% in the past 10 years. There is also evidence suggesting that the incidence of eating disorders has increased in the past decade. Of young people referred by GP's to local specialist NHS mental health services, one fifth are rejected for treatment. Mental health difficulties in adolescence have a lasting impact, not only on later adult mental health, but also on physical health, educational attainment, and work-force participation and satisfaction. Cuts to Child and Adolescent Mental Health Services (CAMHS) have been identified as a major factor in the rise in mental health problems among adolescents. Our local CAMHS service is located 22 miles away in Abingdon, making it inaccessible for some of the most vulnerable young people. Our service for young people also offers after school and evening sessions which further reduce barriers to attendance. Increased availability of mental health services is urgently required.

Our counsellors monitor their clients' progress, with 87% of them improving significantly over the course of counselling. Our client satisfaction surveys rate their experience an average of 9.1 out of 10.

Why is your service is the best solution to meet this need?

RCS and The Space are well-respected, highly organised and clinically effective services. We have a proven track record of delivering high quality counselling, group-work and consultation to those in need. We value the good relationships we have within the community, which we maintain through our awareness raising and outreach initiatives, and which serve to extend our reach and reduce the stigma of seeking help in a timely way. This is reflected in the referrals we receive from GP's, schools and colleges and in the individuals who self-refer. Despite challenging economic and operating conditions we continue to thrive and this is testament to our strong ethos and the balance of sustainable growth and

	<p>thoughtful innovation, such that in the past year, alongside our core delivery of assessment and 1:1 counselling sessions we have offered groups for adults with ADHD, and a Mindfulness Course in a local secondary school. Our organisational structure, and governance model, values and supports the membership of the organisation at all levels, from trustees to volunteers, through provision of regular supervision, professional development opportunities and a strong culture of reflective practice. This ensures that our committed and thriving clinical team offer our clients a robust and consistent service.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Those who will benefit are adults and young people within our catchment who are unable to have their mental and emotional health needs met by statutory provisions or the private sector.</p> <p>For adults, Riverside bridges the gap between NHS provision and the often prohibitively expensive private provision by offering affordable professional counselling, with little or no waiting time, for those who need access to support straight away. We have already expanded our service from Henley-on-Thames to Wallingford and are seeking to establish additional satellites in Didcot and Berinsfield.</p> <p>For Young People in South Oxfordshire, we are able to offer a service for those unable to access the NHS CAMHS services located in Abingdon 22 miles away. Additionally, high thresholds of clinical severity and long waiting times mean that many young people cannot access support through the NHS or cannot access it early on before difficulties become entrenched or more severe. We offer counselling with little or no waiting time to people, regardless of the complexity of their needs. Our counselling service also offers sessions to young people outside school times, an important factor for many families. We are seeking to establish additional satellites for young people in Didcot and Berinsfield.</p>

Applicant's financial forecast - Riverside Counselling Service

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in		£31,024	£31,047	£36,052	£36,232	£36,342
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	£79,352	£104,610	£108,990	£113,730	£118,540
	Training and development	£687	£2,550	£2,420	£2,440	£2,360
	Expenses	£310	£370	£390	£410	£430
	Agency fees and other related employment costs					
Building costs	Rent/mortgage	£12,390	£9,520	£8,700	£9,090	£9,550
	Business rates					
	Gas					
	Water					
	Electricity					
Services	Total					
	Waste collection/disposal					
	TV license/packages					
	Wi-Fi/broadband					
	Phone Line	£168	£205	£220	£235	£260
	Building maintenance					
	Cleaning					
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
Supplies, equipment and consumables	Stationery and postage	£561	£570	£580	£595	£605
	ICT development					
	Meetings costs					
	Publicity and marketing	£662	£950	£950	£700	£700
	Furniture, equipment and maintenance	£139	£150	£150	£150	£150
Professional costs	Building Insurance					
	Trustee Insurance	£723	£790	£810	£830	£850
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc	£495	£510	£520	£530	£540
Other costs	Miscellaneous	£723	£750	£790	£830	£870
	Total Expenditure (B)	£96,209	£120,975	£124,520	£129,540	£134,855
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income					
	Contracted services from local authorities and other organisations					
	Fees received from clients	£74,425	£89,980	£95,100	£100,500	£106,700
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£5,000	£5,000			
	Grants from philanthropic foundations/organisations	£5,000				
	Fundraising income from community / events	£8,611	£8,300	£8,500	£9,500	£10,500
	Other donations	£1,510	£1,200	£2,500	£2,700	£3,000
	Grants from this application	£0	£20,000	£17,000	£15,000	£13,000
Other income	Income from interest on reserves, endowment funds etc	£1,686	£1,500	£1,600	£1,950	£2,100
	Total Income (C)	£96,232	£125,980	£124,700	£129,650	£135,300
Balances at year end (i.e. line A - line B + line C)		£31,047	£36,052	£36,232	£36,342	£36,787

Applicant's project delivery/development plan - Riverside Counselling Service

Riverside Counselling Service www.riversidecounsellingservice.co.uk

Friends' Meeting House, 45 Northfield End, Henley-on-Thames, RG9 2JJ
Phone: 07879 381 334 E-Mail: riversidecounsellingservice@gmail.com

2016-17 [Riverside Business Plan 2](#)

Business Plan 2016-17 and beyond

The Strategic Vision:

To provide a sustainable, affordable, professional and accessible counselling service, to those who most need it in the locality of Henley-on-Thames and surrounding areas for individuals, couples and young people.

The Team

Our team, made up of the Trustees, Clinical Leads, administrative staff, Counsellors, and other ancillary volunteers, is vital to providing the high quality service we provide to clients. Our service regularly attracts a high calibre of placement counsellors in BACP accredited trainings who value the clinical supervision, professional development opportunities, organisational structure and reflective learning environment we provide in return.

Client Satisfaction

For all clients seen we ask them to complete a client satisfaction survey at the end of counselling. In the year 2015/16 we achieved a satisfaction rating of 9.10 out of a maximum of 10. These are just some of the comments received from clients following their counselling.

I found it very helpful and useful.

Clinical
Leads
Trustees

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I hear you have recently opened a practice in Wallingford which is 25 metres from my house! Good plan. It would have made sense to offer a monthly direct debit so that money does not have to be handed over at the end.

I am very happy with the support I received during a challenging period of change in my life. X showed great patience, professionalism and understanding throughout my sessions and I would highly recommend her and Riverside to anyone. Thank you.

She really listened to me and helped me to validate my own experience. I feel that she has helped me enormously and in a way that I can continue to benefit from by using the skills and lessons she has taught me.

First class service. An amazing journey and a truly transformational experience.

X has been amazing. She has helped me through a very difficult time in my life. She has taught me how to become my own counsellor. I feel like I can face the unknown future remembering to have faith in myself. X has given me that confidence, restored my self-worth and helped me to turn a corner.

My counselling with X was fantastic. Painful at times but she was completely committed to helping me. I am so grateful for X and to Riverside.

I do not fully understand how this form of counselling achieves change or progression? I think perhaps this was not the correct avenue for my particular needs. Also a lack of direction to each session. X was lovely and a good listener.

10 X was my counsellor for a year last year after I was made redundant and was re-evaluating my life choices. Our sessions helped me focus in areas which were important or problematic for me. She helped me make the transition to a lifestyle which is much more authentic for me.

11. I think you provide a very important service filling a big void in the NHS. Your service should be available in other areas of the country.

An effective service

We routinely use CORE outcome measure to evaluate change in clients presenting difficulties from the start to completion of counselling. This measure is used across similar services in both

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statutory and voluntary organisations in the UK and so allows us also to evaluate our effectiveness as compared to other services. Of the CORE forms collected from clients ending counselling between June 15-May 16, 87% of clients demonstrated an improvement in results which compares favourably with last year's result at 81%.

A timely service

We routinely monitor how long it takes for someone to be 'allocated' following their initial enquiry. This is the time for them to begin in regular counselling sessions. They will, prior to this, have had an Initial Consultation with one of our allocations team to discuss their needs and the appropriateness of our service to meet their needs. The length of time is formulated as an average and reflects the needs of clients often to have sessions outside of working hours, or at a location close to their home.

Average length of time to Allocation:

13/14	14/15	15/16	
Av Days	42	40	55
Weeks	6	5.7	7.9
Shortest- Days	14	11	7
Longest- Days	127	117	312

An affordable service

We continue to be able to offer clients reduced fee sessions, with those who can afford to pay the standard fee doing so, and those unable to afford the standard fee being subsidised from core funds. In addition we are now collecting Gift Aid on fee donations which provides additional income to support our service delivery.

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Average fee:

13/14	14/15	15/16	
Male	23	24	25
Female	25	22	24
Average	24	23	25
Highest	50	50	50
Lowest	10	5	10

Riverside Counselling Service - Development Targets for 2016 and beyond

- Attract & recruit high calibre placement and qualified counsellors from reputable training institutions and accredited training programs, to maintain and build on current client numbers in line with demand.
- For qualified counsellors: Provide appropriate opportunities for professional development to retain expertise and experience within the team.
- Consider ways of attracting specialist counsellors e.g. couple counsellors in order to offer a broader range of clinical service.
- Management Committee: continue to meet regularly and maintain open and transparent communication. Dates of meetings to be agreed annually, in advance.
- Succession planning: To think strategically about the team to prepare for the future as the service evolves.
- Annual reviews of counsellors: so there continues to be accountability and the provision is evaluated and clinically driven.
- Supervision standards upheld.
- Recruit and maintain a good quorum of Trustees, define roles, select chair.
- Consider linking trustees to specific areas of the service.
- Advisory committee: maintain and build to enhance expertise in specialist areas so Riverside has good professional support.
- Patron: seek & select appropriate patron/patrons to promote the service in line with ethos.

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A containing and safe working environment

- Where all members of the team feel held in mind and valued.

- Continue to provide and promote an ethos that enables reflection, encourages open communication and transparency.
- Maintain monthly team development and reflective practice group.
- Organisational dynamics to be thought about psychodynamically.
- Management Committee to create a space to think strategically about Riverside so that the service ethos is prioritised.

Finances

- Ensure the service remains viable and sustainable.
- Adopt a budget annually that meets the Service's requirement and is progressive and motivational.
- Fundraising strategy enhanced to enable sustainable provision to meet the identified needs of the community: This will be achieved through an integrated programme of fundraising events throughout the year, alongside applications for grants & to trusts and foundations.
- Explore opportunities for collaborative working and links with local businesses (through involvement with OCVA, OxLEP and the Robin Network for example)
- Strategic development of income generating activities alongside core activities, such as provision of training.

See Fundraising Strategy Document

Raising Awareness

Promotion and networking to ensure there is awareness of the provision of Riverside Counselling Service and The Space, its purpose and values:

- Increase number of referrals with new volunteer placement students joining in the autumn.

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- Increase number of client sessions
 - o By producing updated leaflet and renewing contact with:
 - § GP's
 - § Health Professionals, CMHT & CAMHS
 - § Community groups
 - § Other counselling/psychotherapy agencies
 - o Ensure we adequately meet the placement requirements (for example - number of client hours achieved by students)
 - o Maintain number of volunteer placement counsellors: If increase in referrals, increase number of counsellors.
 - o Provide clear professional development opportunities within the organisation for placement students in the later stages of training and post-qualification.

Training & CPD for Counsellors

Continue program of CPD events:

- Once a month: Clinical Case Discussion Group.
- Regular free to attend professional development workshops for Riverside Counsellors & counsellors with The Space.
- Invite external Speakers of high professional standing & promote to external delegates for CPD event: 3-4 times a year.
- Health & Safety workshop annually for all counsellors.
- Safeguarding training for all counsellors working with young people.
- Introduction to Counselling course to run again January 2017.
- Consideration of further training programs in line with the professional development of the service.

Governance

- Maintain accreditation status

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- Continue to meet BACP requirements for an accredited service.
- Update policies and procedures as required: ratification of new & updated policies at MC meetings.
- Analyse and evaluate data to ensure a high quality of service is maintained.
- AGM: appropriate procedure followed and information shared.

Premises

- To maintain good relationships with current providers.

- Ensure premises can accommodate a growing workforce and increasing client numbers: ensure provision meets demands.
- To match provisions with location of counsellors and clients.

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The Space – Counselling Service for Young People

The Space is a confidential, non-judgemental professional counselling service for young people from age 12 – 20+. Young people can self-refer, or can be referred by another trusted person such as a parent, teacher or GP. We offer a sliding scale of fees and offer some free places according to need. Anyone can come for an initial appointment to explore whether or not what we offer will be right for them. We see young people for a variety of issues that may be causing them concern such as:

Riverside Counselling Service launched this dedicated young people’s service in February 2015 in order to reach some of our disadvantaged youngsters, who otherwise would not be able to afford to access counselling services. In order to reach out to a broad demographic we offer subsidised counselling to the young clients. Those who can afford to are asked to make a small contribution for their 50 minute weekly counselling sessions.

Timely access to services at a crucial time

“Asking for help is a massive thing for any young person. But adults seem to see it as a simple task. Please do something about it. It’s time that this changed. We need help.”

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The time of life through secondary school and into young adulthood is an exciting one. Adolescence is the fastest changing period of development after infancy with rapid developments neurologically, emotionally and physically. It is also a period of increased risk and change that can destabilise. If not attended to, this can worsen, with life-long consequences. Adolescence can be a time of establishing new and positive norms as young people develop their adult identity. It is an important life stage for intervention.

This is why at Riverside Counselling Service launched a dedicated service for young people at the start of 2015. For those young people who are struggling with emotional and mental health difficulties. Transition points, such as between child and adult services at age 18, entering and leaving Local Authority care, or leaving school are critical times for supporting young people. The Space does not have a cut off at age 18 and so can support young people at these key transition times.

“Very often there’s no help available until the problem has become totally unmanageable. There isn’t help for me to be able to manage things myself and stop health crises”

Public Health England young people’s survey February 2014

Some key figures:

- Anxiety disorders are among the most prevalent mental ill health problems affecting adolescents
- Half of all mental illnesses (excluding dementia) start by age 14, three quarters by age 24
- By 2026 it is estimated 8.25 million adults will have at least one of a range of mental health disorders including depression, anxiety and eating disorders (excluding dementia)
- 10% of school pupils (5-16 years) suffer from a diagnosable mental health disorder – approximately three children in every class
- Between 6%- 20% of young people may have self-harmed
- Nearly 80,000 children and young people suffer from severe depression

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- Young people in the poorest households are three times more likely to have poor mental health than those in wealthier homes
- Vulnerable groups such as those in care, young people in the criminal justice system, teenage parents, asylum seekers, Lesbian, Gay, Bisexual or Transgender young people, and those excluded from education are over represented in the figures for mental and emotional health problems

What kind of service is needed?

Young people don't want to have to negotiate complex systems to access services when they are seeking help – at The Space they can self-refer and we aim to offer counselling tailored to individual therapeutic need, whether that is for a brief intervention, or longer-term work.

“Young people’s mental and physical health are intertwined, and at the heart of health and wellbeing are their relationships with others. Relationships are at the centre of young people’s health and wellbeing.... Relationships can help make them resilient, but they can also make them vulnerable. Recognising and supporting healthy relationships is central to improving young people’s physical and mental health and wellbeing.....”

The psychodynamic approach to counselling offered at The Space has relationships at the core, and through the relationship with their counsellor young people are supported to explore the issues they bring.

The report *Improving young people’s health and wellbeing - A framework for public health (PHE2015)* concluded that young people:

- felt they had not been taken seriously, especially concerning mental health issues at school or with health professionals
- wanted access to objective staff who were friendly, empathic, nonjudgemental, honest and understanding
- valued the contribution of youth workers, and that of community counselling and therapeutic services

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- felt there should be more specialist services for young people
- valued long-term contact with services for keeping them healthy after they emerged from a crisis

Our aim is to continue to develop a high quality, responsive and evidence based service for the young people of Henley on Thames and the surrounding areas. Our service addresses the points highlighted above and in so doing we can offer a small but significant, evidence based, support to address these difficulties and to help young people to maximise their full potential.

The Space - Development Targets for 2016 and beyond

Increase the number of Counsellors available to work with Young People

Overview: There are currently 11 counsellors/therapists working with young people. Two of these are working solely with young people. Counsellors on placement are asked to allocate some of their total hours to The Space at intake in line with their course case requirements. We have also recruited a placement student on a Cognitive Behavioural Therapy (CBT) training (Anna Freud Centre) who will be offering a dedicated CBT service for The Space. She is starting in early November.

Next steps:

- Counsellors wanting to work with Space clients identified and supported through supervision
- Links with courses to be promoted in an on-going way. Contacts with courses maintained and information about placements given (Oxford. Birkbeck, Metanoia, Terapia, Regents College etc.) Placement Coordinators for courses identified and contacted regarding availability of placements with The Space and ensure we meet placement requirements
- Placement opportunities promoted in line with new BACP working with Young People’s Guidance (see separate section below)

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- Possibility of using freelance therapists/counsellors for paid work to be agreed, to match demand until a pool of Placement/Volunteer Counsellors can be established
- Explore the possibility of advertising placements through the BACP student database service
- Database of placement contacts to be produced

Venue – ‘A Place for The Space’

Overview: Venues currently being used include Friends’ Meeting House, Yoga Central+, Henley Volunteer Bureau, in Henley and the Friend’s Meeting House Garden Room and Ridgeway in Wallingford.

Next steps:

- A partnership agreement is being sought with YMCA with a view to locating ‘garden office’ type premises on site at 2 Lawson Rd.
- Spec drawn up and quotes obtained for different building types for competitive pricing.
- Funding streams identified for Capital costs (Thamesfield Youth Association etc.)
- Partnership agreement drawn up

Raise Profile & Awareness Raising

Overview: We have created a database of local schools and colleges. Mailshot sent in January 2016 to all, including Space Leaflets and a covering letter introducing the organisation. This year we will continue to make links with GPs/Schools/Colleges/Youth Groups to promote the service

- All counsellors working with YP to use Space paperwork for GP letters and other correspondence.
- GP and school/college direct visits to introduce service (Draw up a timetable of visits) and continue to add to database of contacts.

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- Attend events to raise profile (Music On The Meadows, Christmas Market, Living Advent etc.)
- Contribute to programme of open CPD events/conferences to raise awareness of The Space.
- Database of contacts added to.
- Opportunities for collaboration with partner services/organisations explored.
- Timetable of visits developed.

Increase Client Sessions

- Increase number of Referrals & Assessments (in balance with availability of counsellors)
- Increase number of client sessions to 40 pw by improving links with:
 - i. GPs
 - ii. Other Health Professionals (CAMHS)
 - iii. Schools & Colleges
 - iv. Youth & Community groups (eg Nomad/YMCA/The Bridge)
 - v. Other counselling/psychotherapy agencies

As resources permit we would like to develop a brief counselling self-referral slot and explore the possibility of offering 'Adolescent Exploratory Therapy' model (Brent Centre) and links with Pegasus Psychotherapy.

Fundraising.

- Riverside Counselling Service/The Space – Development of fundraising strategy document
- Target for fundraising identified and agreed
- Current fundraising plans implemented (SODC, Stuart Turner, Henley Town Council)

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- Further opportunities (grants & trusts) investigated (Future Building Fund/Sportivate/High Sheriff/Police Commissioner/YMCA)

CPD for Counsellors working with adolescents

Overview: Counsellors working with Space clients are able to access specialist CPD to support their clinical development. This will include regular specialist workshops (monthly groups) as well as part of the overall programme of CPD.

BACP guidance on working with young people has been produced recommending further training for qualified counsellors who wish to specialise in work with young people. It is envisaged that The Space can provide specialist placements for counsellors wishing to develop skills in working with young people in return for a programme of CPD opportunities. A plan for development to be drawn up and to explore links with the Association for Psychodynamic Practice and Counselling in Organisational Settings (APPCIOS)

- Contribute specialist CPD (relating to working with young people) to the programme of Riverside CPD
- Regular Adolescent Workshops – 2 monthly groups for RCS counsellors working with YP
- Suicide/Self Harm and working with risk CPD workshops
- Margot Waddell to speak at public lecture (Development of Borderline Personality)
- Plans drawn up for a programme of CPD for counsellors specialising in work with YP (Work discussion groups, supervised placements, seminars, support in joining APPCIOS – possibilities of accredited top-up training to be explored)
- The clinical lead is now a Full Member of APPCIOS. Initial talks have taken place with APPCIOS with a view to accreditation of courses
- Project plan drawn up for 'Relating to Adolescents – further Psychodynamic Counselling Skills for Counsellors working with Young People' Training Course

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Assessment team: To maintain coherent assessment & allocation processes

& procedures:

- Continue to integrate assessment of Space clients with RCS assessment processes.
- Additional counsellors identified to undertake Initial Consultations (IC's) for The Space
- Dedicated IC & Allocations Coordinator for The Space by April 2017
- Job description to be drawn up

Working safely with young clients:

- Safeguarding Policies & Procedures reviewed annually
- Safeguarding Policy to be included in counsellor handbook and raised at induction
- Safeguarding training for all counsellors in line with Oxfordshire Safeguarding Children Board requirements
- Safeguarding Leads to attend Specialist Training as required
- Riverside Policies & Procedures reviewed in relation to working with Young People (safer recruitment, lone working, consent, assessment etc)
- CPD sessions on relating to self-harm and managing risk
- Review Safeguarding Policy annually
- Safer Recruitment Policy drawn up and implemented

Working with young people in groups

Overview: We aim to widen access to therapeutic support to those who would not attend for 1:1 counselling through the provision of groups for young people. Starting in October 2016 we piloted a Mindfulness Course at Gillotts School. In order to offer this independently of a certified mindfulness practitioner we will need to train one of our team in the Mindfulness In Schools Project programme called Dot Be (.B) This training will certify the practitioner to run the programme in schools and gives access to updated materials and resources to run the programme.

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- Mindfulness Groups – Pilot project being run at Gillotts School (starting 31/10) over 8 weeks

Subject to evaluation and to funding we envisage repeating this group in partnership with other local schools/colleges

Other groups we would like to develop are:

- Emotional Wellbeing Drop in group in partnership with YMCA
- Young People's Anxiety & Depression group
- Parenting Teenagers – explore possible collaborations with schools/voluntary sector organisations such as Parentlink
- 'Sport & Thought' group – a year long football based intervention for adolescent boys at risk of exclusion/offending – this is being explored as a partnership project subject to funding. Links to be explored with OUFC/RFC as well as with local league football teams.

Advisory committee/YP Trustee/Patron for The Space

Possible people for the board of trustees and an advisory committee to be identified and agreed – for example a C&A psychiatrist/Clinical Psychologist/C&A Psychotherapist

Visits to Young People's Counselling services

To support planning & development of 'The Space' and build relationships with other therapeutic and relationship based services – visit/speak to identified services for adolescents such as Nomad, No. 5, The Abingdon Bridge, The Bridge Service, Open Door, Off the Record, Brandon Centre, Brent Centre.

South Oxfordshire Food and Education Alliance		Ref	SRev\41
A growing service offering vocational training and employment support to young and vulnerable people and a food bank for non-profit organisations.			
Total cost (over four years)	£2,301,100	Amount requested (over four years)	£94,000
Previous grants: No previous awards			

District ward areas covered:
All areas

Scoring

Does the grant reduce each year?			
The grant reduces by over 10 per cent most years (year four's reduction is slightly less).			Score 2/2
Long term financial plan			
Their financial plan shows a significant increase in staffing costs over the grant period compared to their current costs, but they hope to work with more vulnerable people and non-profit group over the four years, which might account for some of the increase.			Score 1/2
Do they have at least one year's running costs in reserve?			
No, and they currently do not meet their reserve policy to hold at least six months running costs in reserve.			Score 0/2
Have they covered their costs for the last two years?			
No, they covered their costs this year, but made a small deficit in 2014.			Score 1/2
What are their other funding sources?			
They plan to cover most of their other costs with income from contracted services and membership fees for their food bank service, although only some of this income is guaranteed. The rest will come from grants and donations they have yet to secure.			Score 1/2
Evidence of local need			
Equality officer: There is strong evidence for both elements of their service (suggested score 2 points). Community Safety Team Leader: Strong evidence of need (suggested score 2 points). Grants Officer: There is good evidence showing a local need for their training service and food re-distribution service.			Score 2/2
Working with our corporate priorities			
Equality officer: The service offers high levels of contribution to our equality objectives (suggested score 2 points). Community Safety Team Leader: Strong levels of contribution (suggested score 2 points). Grant officer: This service contributes well towards the 'jobs for everyone' and 'thriving communities' objectives.			Score 2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?			
Their policy seems robust and they actively encourage volunteers, with over 100 currently working with them.			Score 2/2
What evidence is there that their service is the best solution to the need identified?			
Equality officer: Strong evidence this is the best solution to these issues (suggested score 2 points). Community Safety Team Leader: There is some evidence this is a good solution, but I'm not that familiar with their service and there are other groups offering similar vocational training (suggested score 1 point). Grants Officer: Over the last two years, they have built up a good network of community			Score 2/2

organisations to distribute excess food to. They have built a good reputation for their training programme which fills a gap in the statutory/mainstream education system. They provided reasonable evidence of support from external agencies as well.			
How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Strongly support this service (suggested score 2 points). Grants Officer: This organisations has strong support from other officers and external organisations.		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
Their activity based targets seem fairly reasonable. Their operational targets could be improved to build more sustainable income streams and other collaborative working.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
Their project delivery and development plan seems robust and reasonable and, if they can secure the required funding/resources, should be achievable.		Score	2/2
What is the funding for?			
To increase capacity for their existing service.		Score	1/2
Total score	21/26	Recommended Grant	£94,000

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>There is a great need for the work SOFEA does. In providing help, support and training for vulnerable and disadvantaged people and providing food to those in need, we play a vital role in our community.</p> <p>A report from August 2016 "The employment landscape for young people in the UK" by Ernst and Young sets out the need for organisations such as SOFEA in reducing youth unemployment and providing non traditional opportunities for those young people needing an alternative to school or college. This is exactly what we have developed at SOFEA. The mainstream education and training environment does not suit many young people, especially those with significant barriers such as disability, learning difficulty, poor home support and mental health issues.</p> <p>The report "Future in Mind" by the Department of Health and NHS England 2015 demonstrates the importance of activity such as that provided by SOFEA in ensuring good mental health in young people, especially those disadvantaged or vulnerable. We are working with partners on a bid to provide some services for Oxfordshire's Children and Adolescent Mental Health Services.</p> <p>"Oxfordshire Skills Strategy" 2016 produced by the Oxfordshire Skills Board for OXLEP sets out four strategic priorities, all of which SOFEA plays a part in supporting, especially "Up-skilling and improving the chances of young people and adults marginalised or disadvantaged from work, with a particular focus on those claiming ESA to move them closer to the labour market." Oxfordshire Skills Board have indicated their support for this application. The refreshed version of this strategy, available later this year, continues to place emphasis on this group and even greater emphasis on bridging the gap for young people to employment.</p> <p>Sophie, a Trainee at SOFEA, says "SOFEA has helped me get something better than I ever thought I would get".</p> <p>On November 22nd we received from Oxfordshire County Council a list of over 50 young people in South Oxfordshire who are currently not in</p>

	<p>Education, Employment or Training. These young people are exactly the cohort we specialise in working with and can accommodate at SOFEA, in addition to those currently with us. This list probably indicates only the tip of the iceberg, we believe there are many more young people who do not access education and training provision.</p> <p>SODC Corporate Priorities to provide homes and jobs for everyone and to ensure that Didcot's potential is unlocked indicates the need for the work of SOFEA. Didcot Town Council has previously provided a small amount of funding to support SOFEA.</p> <p>Many other local charities are under financial pressure. If they can make cost savings through their membership of our food redistribution, then it can make the difference between being able to provide the service and not. A Nat Cen survey for the national charity FareShare reached the conclusion that one in five of the charities supported with food would close without it.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>SOFEA is the only organisation in the South Oxfordshire area that provides a full time, professional, innovative education programme for young people who have struggled in other mainstream settings. Our unique three phase approach of work experience, behavioural support and qualifications is proven to work and our progression rate is 85%. Young people engaging with SOFEA quickly appreciate that they are providing an essential service to their community of real value, while gaining the skills and attitudes they need. Our staff have expertise in teaching, therapeutic settings, coaching, business and the charitable sector. The case studies and testimonials on our website, as well as those below demonstrate the impact we have. The staff at SOFEA have worked with the most vulnerable young people in Didcot and surrounding area for over 6 years (and prior to that teaching in Didcot schools since 1995) and have considerable expertise in engaging with them and successfully getting them into work. There is no other organisation in South Oxfordshire with the access to, or the ability to distribute such large quantities of nutritious food to other organisations. We have a fully professional logistics operation, which is able to distribute several tonnes of food each week.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The primary beneficiaries of the need we have identified will be young people aged between 14 and 24 who participate in our education and training programmes and are equipped not just for work but for successful futures, we will work with up to 100 per year from South Oxfordshire.</p> <p>In addition local employers benefit as they are able to tap into a pool of labour that was previously not available to them, we will work with up to 24 employers each year in South Oxfordshire.</p> <p>Local community groups who provide food to their service users will also be able to benefit from the provision of high quality nutritious food at low or no cost. We aim to work with every school breakfast club and elderly lunch club in South Oxfordshire who would like to use the service and many others, such as disability centres and foodbanks.</p> <p>The redistribution of surplus food prevents food waste and consequently reduces the impact on the environment, there will be 300 tonnes less waste each year.</p> <p>The combination of food redistribution and training for disadvantaged people means that the whole community benefits from the work of SOFEA.</p>

Applicant's financial forecast - South Oxfordshire Food and Education Alliance

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£18,000	£77,250	£95,350	£112,450	£143,550
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Training and development (all staff and volunteers)	£5,500	£6,500	£7,500	£7,500	£7,500
	Expenses	£3,000	£6,000	£7,000	£8,000	£8,000
	Agency fees and other related employment costs	£1,000	£1,000	£1,000	£1,000	£1,000
	Staff costs (please list all paid posts individually including on-costs):	£211,000	£328,000	£359,000	£405,000	£520,000
Building costs	Rent/mortgage	£43,000	£45,000	£45,000	£45,000	£50,000
	Business rates	£4,000	£4,000	£4,000	£4,000	£4,000
	Gas	£0	£0	£0	£0	£0
	Water	£3,000	£3,000	£3,000	£3,000	£3,000
	Electricity	£6,000	£6,000	£7,000	£8,000	£9,000
	Service Charge	£4,000	£4,000	£4,000	£4,000	£4,000
Services	Waste collection/disposal	£0	£500	£500	£1,000	£1,000
	TV license/packages	£0	£0	£0	£0	£0
	Wi-Fi/broadband	£1,000	£1,000	£1,000	£1,000	£1,000
	Phone Line	£500	£500	£500	£500	£500
	Building maintenance	£2,000	£3,000	£3,000	£3,000	£4,000
	Cleaning	£500	£500	£1,000	£1,000	£1,000
	Alarm/Emergency lighting maintenance	£500	£500	£500	£500	£500
	Legal Costs for staff contracts etc	£0	£0	£0	£0	£0
	Window cleaning/land scaping	£0	£0	£0	£0	£0
	Pest control	£400	£400	£400	£400	£400
Supplies, equipment and consumables	Stationery and postage	£6,500	£6,500	£6,500	£6,500	£6,500
	ICT development	£4,000	£4,000	£4,000	£4,000	£4,000
	Meetings costs (conference rooms, catering etc etc)	£500	£500	£500	£500	£500
	Publicity and marketing (design, print and photocopying)	£4,000	£5,000	£5,000	£5,000	£5,000
	Furniture, equipment and maintenance	£50	£500	£1,000	£1,500	£2,000
Professional costs	Building Insurance	£0	£0	£0	£0	£0
	Trustee Insurance	£600	£600	£600	£600	£600
	Public/Employee Liability & Personal Accident	£600	£600	£600	£600	£600
	Professional fees (accountants, legal, HR etc)	£3,800	£5,000	£6,000	£6,000	£6,000
	Health and Safety	£300	£300	£300	£300	£300
	Vehicle hire	£20,000	£10,000	£10,000	£10,000	£0
Other costs	Fuel	£10,000	£12,000	£14,000	£16,000	£18,000
	Vehicle insurance	£8,000	£9,000	£10,000	£10,000	£11,000
	Van livery	£1,000	£2,000	£2,000	£2,000	£2,000
	Forklift rental	£6,000	£1,000	£1,000	£1,000	£1,000
	Chiller rental	£4,000	£0	£0	£0	£0
	Capital expenditure: Vehicles	£20,000	£10,000	£10,000	£0	£0
	Capital expenditure: Equipment	£5,000	£5,000	£0	£0	£0
	Capital equipment: Chillers	£12,000	£0	£12,000	£12,000	£0
	Education supplies	£8,000	£9,000	£9,000	£9,000	£9,000
	Loan repayments	£10,000	£10,000	£0	£0	£0
	Contingency	£1,000	£1,000	£1,000	£1,000	£1,000
	Total Expenditure (B)	£410,750	£501,900	£537,900	£578,900	£682,400
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£120,000	£175,000	£200,000	£225,000	£250,000
	Earned income (charity shops, fees for training etc - if applicable)	£170,000	£200,000	£225,000	£250,000	£275,000
	Contracted services from local authorities and other organisations	£25,000	£40,000	£40,000	£50,000	£50,000
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£60,000	£30,000	£20,000	£20,000	£10,000
	Grants from philanthropic foundations/organisations	£70,000	£50,000	£40,000	£30,000	£30,000
	Fundraising income from community / events	£0	£0	£0	£0	£0
	Other donations	£0	£0	£0	£0	£0
Other income	Income from interest on reserves, endowment funds etc	£0	£0	£0	£0	£0
	Other training income	£25,000	£25,000	£30,000	£35,000	£45,000
	Total Income (C)	£470,000	£520,000	£555,000	£610,000	£660,000
Balances at year end (i.e. line A - line B + line C)		£77,250	£95,350	£112,450	£143,550	£121,150

Applicant's project delivery/development plan - South Oxfordshire Food and Education Alliance

Business Plan 2016-2020

At SOFEA we work with young people to build their employability, whilst providing nutritious food for those in need.

Our values:

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.

Our aims are to:

- feed young people with skills and self esteem
- feed the workforce with skilled and trained people
- feed the most vulnerable members of the community

We will do this by:

- We will always support people disadvantaged in the labour market (back) in to work by breaking down barriers and allowing individuals to develop their self-worth and personal determination to succeed
- We will help to reduce social costs by our determination and unflinching commitment to support at risk individuals to reengage
- We will assist employers in our community to find cost effective ways to recruit the right workers
- We will help to feed those in need in our community
- We will reduce the amount of food being wasted

About Us

Based in Didcot, we serve our community in three ways:

- through a holistic education and training programme for **local** people disadvantaged in the labour market.
- through the redistribution of food to charities across the town, wider community and the wider Thames Valley **region**, which provides the main context for practical work skills.
- by reducing food waste and making a contribution to the **global** environment.

South Oxfordshire Food and Education Alliance is a Charitable Incorporated Organisation, which has developed from our experience in the education and youth sector.

Our combination of academic, practical and therapeutic (head, hand and heart) support is unusual and highly effective.

Our Theory of Change

The problem

- There are many young people who reach the end of their compulsory education without the attitudes, behaviours and skills to progress successfully and it is difficult for them to access the support they need.

- There are many disadvantaged people in our communities in food poverty, needing support.
- There is a great deal of food waste.

What we do

Our vision and mission, through our food rescue operation, is to provide surplus food (from supermarkets, their distribution centres and suppliers) to vulnerable people and to cut waste.

Working closely with communities, local government and food charities we offer this nutritious food to organizations working with at risk people who are unable to or cannot afford to feed themselves or others within their family.

We use our food rescue warehouse to provide training and education for those disadvantaged in the labour market, mostly aged between 16 and 24. The practical training includes generic employability skills such as self-management, teamwork and communication and sector specific skills such as forklift truck driving and stock management for those who wish.

The academic education includes a focus on numeracy and literacy skills and qualifications in personal development, employability, IT, Arts Award, warehousing and logistics

At the core of these programmes our highly skilled team also implements a sophisticated behavioural change programme, which encourages Trainees to explore their own behaviours and to make the changes they think are necessary.

The combination of hand/ heart/ head brings about significant and lasting benefits not just in job outcomes but in broader attitudes and mindsets.

Our Model

Using our food redistribution warehouse to train young people means that they are in a real work environment with a real social impact.

The work is real, not simulated, and needs to be done to a high standard so that SOFEA is compliant with the law and provides food for those in need.

The need to work in a team, communicate and self manage are evident and this provides the context in which we can address profound behavioural change.

Often we work with young people who have serious barriers to their progression and the behavioural work gives them a chance to overcome those barriers, in a flexible and non time limited way.

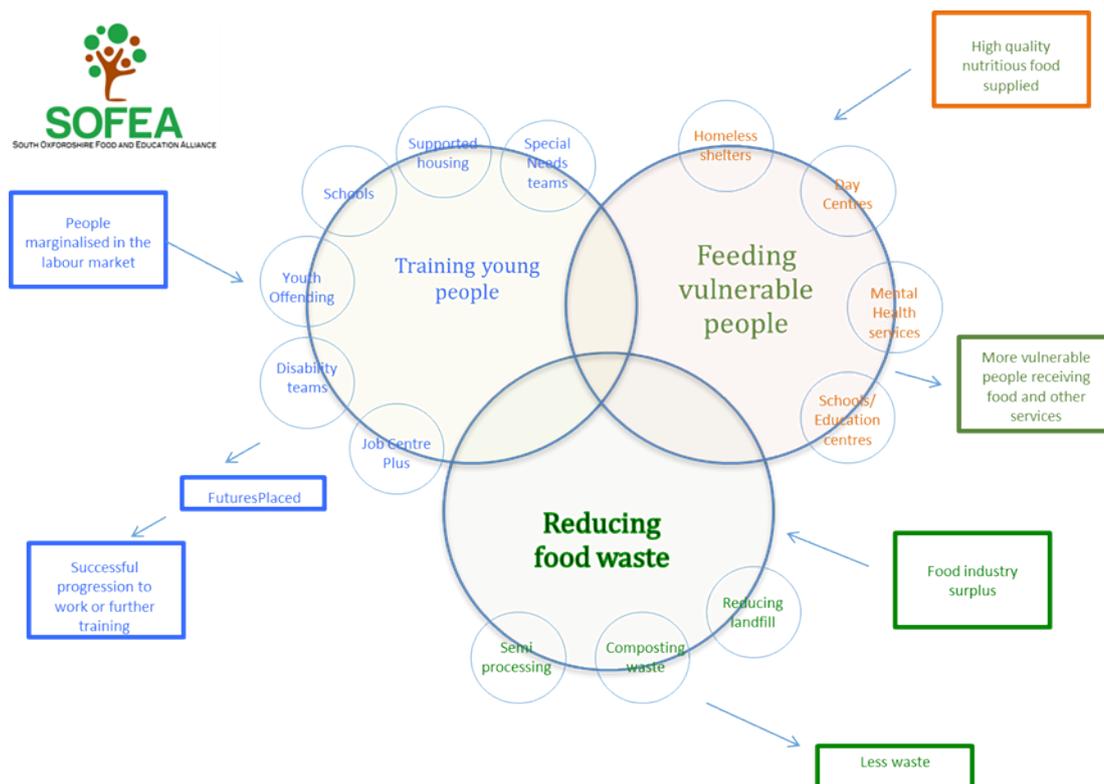
The accredited qualifications they gain from the academic work, then act as currency to future employers.

Through our own recruitment service “FuturesPlaced” we seek to work with local employers to place people in the most appropriate positions.

The diagram below shows the three interconnecting social aims of the organisation. It demonstrates the value chains within the ecosystem that we have created by working with partners.

Partners working with young people are able to refer young people for education and training and the value is created as they progress successfully.

The food industry partners provide surplus food, which enables us to help our charity partners to reduce their food spend and use the saving to enhance their services. The surplus is prevented from going to waste and therefore has an environmental benefit.



Impact

In the short time since we began, some of the outcomes we have achieved are:

- a. 120 young people completed training programmes and progressed to full time employment or back into full time education in our first two years of operation.
30 new Trainees currently on training programmes in 2016-17
- b. 200 people given confidence building opportunities in the period September 2014- May 2016
- c. 130 People given qualifications, including Trainees, long term unemployed, staff and volunteers
- d. 1 million meals provided from food valued at £1.5m in the period September 2014 to May 2016
- e. 500 tonnes of food redistributed to other not for profit organizations and kept from landfill in the period September 2014 to May 2016

- f. Network of over 100 organisations recruited to receive food to May 2016, in the geographical area containing Didcot, South Oxfordshire, Banbury, Oxford, Milton Keynes, Aylesbury, Slough, High Wycombe, Reading, Newbury and Swindon
- g. Network of local employers working directly with us to provide employment opportunities including Tesco, Chefdirect, Batter Bathrooms, Digital Barriers
- h. 10 staff employed, five of whom have been long term unemployed and/ or have disabilities

85% of the young people completing programmes with SOFEA make positive progressions to further training or employment.

We make every effort to continue to support the remaining 15%, by referring them to appropriate organizations and keeping our door open should they wish to return.

Partnerships

Over the last two years SOFEA has developed many strong and sustainable partnerships, including:

Strategic Partnerships

- i. FareShare UK – SOFEA operates FareShare Thames Valley, working with FareShare UK to source food and to maintain food safety standards.
- ii. Activate Learning – SOFEA subcontracts training funding from Activate, the largest FE provider in Oxfordshire and Berkshire. SOFEA is building a longer term relationship with Activate.

SOFEA's Contracts

In order to become sustainable without grant funding in the longer term, SOFEA has developed contracts with the following organizations:

- i. Activate Learning
- iii. Oxlep
- v. Building Better Opportunities – Risk of NEET – led by Activate
- vi. Building Better Opportunities – Entrenched NEET – led by Aspire
- vii. CAMHS – part of a consortium bidding for the renewal of the Child and Adult Mental Health Service, led by Response

Schools

- i. Local schools with whom we partner in providing programmes include St Birinus, King Alfreds, Didcot Girls', Oxfordshire Virtual School, MacIntyre
- ii. Local independent schools who provide volunteers and work experience opportunities Cokethorpe, Radley, St Helen's and St Katherine's and Shiplake

Oxfordshire Wide

- i. Oxfordshire Skills Board and OxLEP – the CEO of SOFEA is the Vice Chair of the Skills Board, which manages the Skills agenda for OxLEP

- ii. Oxfordshire Charity Leaders – the CEO of SOFEA sits on this new group of charity leaders across Oxfordshire
- iii. Oxfordshire Business First – SOFEA is a member of OFB

Local

We are building relationships with local government and stakeholder groups such as:

- i. Vale of White Horse DC
- ii. South Oxfordshire DC
- iii. Didcot Town Council
- iv. Didcot Rotary Club
- v. Didcot First – SOFEA won a Business and Community Award for its partnerships in 2015

Five Year Strategy

Between 2016 and 2020 we aim to ensure that we have the infrastructure, resources and expertise in place to bring our Didcot operation to its full potential. Beyond that we aim to use the expertise we have to include new contexts and new partners in this journey.

Objective 1: To transform the lives of more people from our Didcot site

Target: 150 people engaged in training between Sept '16 and Sept '17

We will expand our scope to include special schools; adults with disabilities and disability groups.

We will develop our engagement with other agencies working with young people to ensure that the benefits of programmes at SOFEA are clear and we are regarded as a “go to partner”

We will introduce new courses at higher academic levels, and will develop a leadership programme for young people to equip them to supervise and manage our operation, with a view to employing them as apprentices.

We will encourage more adults marginalized from the labour market to volunteer with us

Objective 2: To provide more high value, nutritious food to more vulnerable people

Target: Double the capacity of the Didcot site in 2016 – 2017 to over 500 tonnes
Increase the number of active Community Food Members by a further 50 by Spring 2017, focusing on South Oxfordshire

We will do this by fully developing the potential to supply food to charities in the towns we already have a presence in, by Spring 2017, and ensure resources are in place to manage increased activity from Didcot.

We will use our own Leadership programme for young people to grow our own talent and provide the workforce required.

We will work with existing CFMs to identify premises available for collection centres and the resources needed for this.

Objective 3: Develop the training model by Spring 2018

Target: To open three new training opportunities in order to broaden our reach by the end of 2017

We will do this by developing opportunities to add additional training contexts to our existing offer, in IT, customer service, sport and the arts.
 We will work with a range of partners to develop models that enable us to support more people, including the development of our existing model to new locations.

Long Term Objectives

Objective 4: Exploring ownership models to strengthen the position of SOFEA as a community enterprise, including exploring the possibilities of community ownership with our local stakeholders

Objective 5: Adding more contexts for developing the education and training model by exploring options such as working with partners

Objective 6: Scaling the combined food and training model to more sites

Targets

	2016	2017	2018	2019
Trainees / Volunteers	120	150	200	250
Completions	90%	90%	90%	90%
Progressions	85%	85%	88%	90%
Food tonnes rescued	300	500	700	800
CFMs	100	150	220	250
Surplus	£15000	£25000	£50000	£50000
Staff/ of whom apprentices	10	12/4	12/8	14/10

Headline Finances

In the year to June 30th 2016 SOFEA performed as follows:

Income **£308000**

Made up of: Donations £ 51000
 Grants £ 65000
 Sales £ 84000
 Training £108000

Expenditure **£290000**

Made up of: Staff £165000
 Expenses £125000

The projections in the year to June 30th 2017 are as follows:

Income **£500000**

Made up of: Donations £ 80000
 Grants £130000
 Sales £120000
 Training £170000

Expenditure **£475000**

Made up of: Staff £270000
 Expenses £205000

My Life My Choice		Ref	SRev\38
Self-advocacy support groups around Oxfordshire (including Didcot and Henley) for people with learning disabilities.			
Total cost (over four years)	£51,041	Amount requested (over four years)	£16,840
Previous grants: No previous funding			

District ward areas covered:

Didcot West, Didcot South, Didcot North East, Henley-on-Thames

Scoring

Does the grant reduce each year?		
The request is for 33 per cent of the running costs for their service in South Oxfordshire over the four year period and does not reduce over the period.	Score	0/2
Long term financial plan		
A very detailed financial plan is provided.	Score	2/2
Do they have at least one year's running costs in reserve?		
They held £93,185 in reserve at 31 March 2016, which is in line with the organisations reserves policy.	Score	1/2
Have they covered their costs for the last two years?		
The organisation made a profit in the period up to 31 March 2015 of £45,742 but made a loss in the period up to 31 March 2016 due to a £27,500 cut in Oxfordshire County Council's grant and an increase in staff costs of £36,468.	Score	1/2
What are their other funding sources?		
The organisation has identified £8,299 of other ring-fenced funding for the provision of services in South Oxfordshire. There are no assurances about funding for the organisation as a whole.	Score	1/2
Evidence of local need		
Equality officer: There is strong evidence of local need for this service (suggested score 2 points). Grants officer: There is evidence of need for the service in Didcot and Henley but the beneficiaries are in low numbers.	Score	2/2
Working with our corporate priorities		
Equality officer: The service offers high levels of contribution to our equality objectives (suggested score 2 points). Grant officer: This service offers some contribution to our thriving communities' priority and our equalities objective to help deliver better outcomes for disadvantaged people. However, this is limited to the two towns they work in, Didcot and Henley.	Score	1/2 (counts as 2 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation has a clear volunteer policy and was nominated for the Queen's Award for Voluntary Service.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Equality officer: There is strong evidence that this is the best solution to the need based on their external support and own experiences. As far as we know, they are the only self-advocacy group in the county, and offer an award winning service (suggested score 2 points). Grants Officer: Significant level of evidence to support the need for the service.	Score	2/2

How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Strongly support this service (suggested score 2 points). Grants Officer: Oxfordshire County Council has supported the organisation financially for over 15 years showing their support. In addition, grants were supported through Oxfordshire Community Foundation and they were awarded an 'NHS Equality Award'.		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets appear reasonable by offering 24 group meetings (increasing to 26 by March 2018) and four training workshops per financial year across the four year period together with some growth in the number of travel trainees (from 4 to 14 by March 2018). The number of service beneficiaries/members increases by 25 by March 2018.		Score	2/2
How achievable/reasonable is their project delivery/development plan?			
The organisation appears strong in its project management and delivery plans.		Score	2/2
What is the funding for?			
The funding will enable the current projects in Didcot and Henley to continue and potentially grow.		Score	1/2
Other observations and comments			
Officers have no issues regarding funding this organisation.			
Total score	20/26	Recommended Grant	£16,840

Applicant responses

<p>How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?</p>	<p>The need for the group is firstly identified by the current 14 regular attendees at the Henley group and the 15 at the Didcot group. Our monitoring and evaluation processes includes quarterly 'think tanks' with our 130 county wide group members; the collective voice of these group members, through talking about their challenges and experiences helps to inform the Trustees about what the charity should be doing in order to meet their needs. Our research consistently shows that 90+% of our members most value the charity for empowering them to 'have a voice', to learn new skills, and helping them to 'speak up for a fairer society' through the self-advocacy groups.</p> <p>There are around 1.5 million people with learning disabilities in the UK; most have few life opportunities and are often considered the most disadvantaged disabled group, with, for example, only 7% being in paid work or self-employed. Of those that do work, 70% work for less than 16 hours per week (NHS Learning Disability Toolkit, NHS England, 2015). Our beneficiaries are genuinely in need of support to improve their situation, especially in a time of recession and Government spending cuts. Our self-advocacy groups not only gives our beneficiaries a voice to advocate for such things as better education, access to transport, and protection of benefits, but also provides access to work opportunities, projects to build skills/confidence, and a place to belong and to be proud of.</p> <p>Oxfordshire County Council's "Big Plan 2015-18" highlights the importance of self-advocacy, full citizenship, active lives, & work opportunities; the Big Plan is directed by national Government policy Valuing People Now (2012) that stresses the need of rights, independence, and inclusion for people with disabilities. The then Minister for Disabled People Esther McVey launched 'Fulfilling Potential: Making it Happen' (2 July 2013) with the key theme being to "help disabled people do the best they can and take part in their local area" – the work of the MLMC self-advocacy groups strongly meets this theme. The Henley and Didcot group members have said that they want to encourage the general public to see them in a more positive light, as individuals who do want to work, be part of the community and are not a "burden to the taxpayer."</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>MLMC is the only self-advocacy organisation of its kind in Oxfordshire and a leading one both locally and nationally (backed up by awards such as "best co-production" at the National Advocacy Awards 2016, Oxfordshire Charity of the Year 2016, Prime Minister's Big Society Award 2013, and Guardian National Newspaper Charity of the Year 2010).</p> <p>Over its 15 year history, the charity's core work has been the empowerment of people with learning disabilities. Through these years, with experienced staff and trustee support, the charity has consistently delivered on the core mission "to ensure that people with learning disabilities in Oxfordshire have their say and take control of their lives in order to make a positive contribution."</p> <p>MLMC has a track record of running challenging, user-led and creative projects (e.g. StingRay nightclub now entering its 9th year) whilst achieving impressive outcomes, evidenced by increasing membership and expanding reach. The Henley and Didcot groups have been run successfully for six and eight years respectively and many beneficiaries have progressed through the charity to gain paid/volunteer work, travel independently, to be valuable spokespeople and to become trustees of MLMC. We are uniquely experienced and qualified to deliver our work in South Oxfordshire.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The current 14 regular attendees with learning disabilities at the Henley group and the 15 at the Didcot group will be the main beneficiaries. There are also a further 8 people on a waiting list to attend these groups and we hope to meet that need once we secure a larger meeting room which we will do if/when we secure funding. Family carers and support workers also</p>

	<p>benefit by receiving a few hours of respite each month. The local facilitators and co-facilitators of each group benefit by receiving paid work in their local area and the Henley YMCA and Didcot Methodist Church receive fees for the venue hire. Local taxi firms benefit from being paid to transport those group members with more profound and complex needs who do not travel independently or have the necessary support from family carers or support workers. Local shops benefit when we buy such items as refreshments for the group meetings. It is also important for MLMC as a countywide charity to have self-advocacy groups far and wide so that people with learning disabilities benefit from our work throughout the county and not just in the main populated areas e.g. Banbury and Oxford.</p>
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Applicant's financial forecast - My Life My Choice

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£93,185	£120,763	£108,884	£102,769	£95,272
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)	238642	243414	248282	253247	258313
	Training and development (all staff and volunteers)	2980	3039	3100	3162	3225
	Expenses	15822	16138	16461	16790	17125
	Agency fees and other related employment costs	2817	2874	2930	2990	3049
Building costs	Rent/mortgage	24560	25051	25552	26063	26584
	Business rates					
	Gas					
	Water					
	Electricity					
Services	Total					
	Waste collection/disposal					
	TV license/packages					
	Wi-Fi/broadband	680	680	680	680	680
	Phone Line	1000	1000	1000	1000	1000
	Building maintenance					
	Cleaning					
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
Supplies, equipment and consumables	Stationery and postage	2400	2400	2400	2400	2400
	ICT development	3139	3500	3500	3500	3500
	Meetings costs (conference rooms, catering etc etc)	8300	8500	8700	8900	9100
	Publicity and marketing (design, print and photocopying)	12317	2400	2400	2400	2400
	Furniture, equipment and maintenance	600	250	250	250	250
Professional costs	Building Insurance					
	Trustee Insurance					
	Public/Employee Liability & Personal Accident	499				
	Professional fees (accountants, legal, HR etc)	18000				
Total Expenditure (B)		£331,756	£309,246	£315,255	£321,382	£327,626
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	1000	1000	1000	1000	1000
	Earned income (charity shops, fees for training etc - if applicable)	32041	42000	52000	52000	52000
	Contracted services from local authorities and other organisations	21095	27965	27965	27965	27965
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	166548	132750	130000	130000	130000
	Grants from philanthropic foundations/organisations	133591	88340	92757	97394	102264
	Fundraising income from community / events	5059	5312	5418	5526	5637
	Other donations - Legacies					5000
Other income	Income from interest on reserves, endowment funds etc					
Total Income (C)		£359,334	£297,367	£309,140	£313,885	£323,866
Balances at year end (i.e. line A - line B + line C)		£120,763	£108,884	£102,769	£95,272	£91,512

Applicant's project delivery/development plan - My Life My Choice

My Life My Choice strategy 2016-19

My Life My Choice mission

- To make sure that there is independent support for people with learning disabilities in Oxfordshire to have their say, claim their rights and to take control of their own lives.
- To ensure that the views of people with learning disabilities are taken seriously by both professionals in the services they use and by the wider public.
- Also, to 'Power Up' their lives so that they can make a positive contribution to society.

The values of My Life My Choice

- **All projects are led by people with learning disabilities**
- **Building Strengths** – using and valuing people's skills and then achieving great things with exciting projects.
- **Empowerment** – empower people with learning disabilities to achieve the best they can.
- **Building Bridges** – working with communities in Oxfordshire to get real change for people with learning disabilities.
- **Taking Part** – people with learning disabilities making decisions in the group or community.
- **Tackling Exclusion** – Champions campaigning for positive change.
- **Enabling Others** – involving people in activities and roles so they can further develop their skills and confidence.
- **Building a Vision** – involving people in seeing the way forward and the changes needed to get there.
- **Our staff** are expected to be passionate about, and proud of their role. Team working is fundamental to our standards, by assisting others and taking on additional responsibilities / tasks if necessary. We are also results driven, pro-active, committed and self-motivated to achieving targets, embracing accountability for our own actions.

The background of My Life My Choice

1. Who we are

My Life My Choice (MLMC) raises the levels of self-esteem, confidence and quality of life for people with learning disabilities by providing volunteering, training, employment and social opportunities for its members. This disadvantaged group faces multiple levels of deprivation and the charity works to help its members to combat isolation and to lead more fulfilling lives.

The charity is the only independent, user-led, self-advocacy organisation (all 15 trustees have learning disabilities) of its kind in Oxfordshire.

The membership, spread throughout the county, has grown from 320 to over 530 since January 2009. The charity's website receives over 3000 views per month; the three Twitter accounts have a total of 3250 followers (messages raising awareness about disability hate crime have been re-tweeted by MENCAP to their 181,000 followers), and the Facebook account has over 800 'friends'.

2. The need for My Life My Choice

There are around 1.5 million people with learning disabilities in the UK; most have few life opportunities and are often considered the most disadvantaged disabled group with, for example, only 6.7% in paid work (NHS Learning Disability Employment Toolkit, NHS England, 2015).

This is far lower than the 47% employment rate for all disabled people (Office for Disability Issues, 2014). If any of our beneficiaries are to access the workplace or to fulfil their potential then they need the opportunities that MLMC provides to help them contribute towards a better society and to improve their skills and confidence.

The then Minister for Disabled People Esther McVey launched “Fulfilling Potential: Making it Happen” (2 July 2013) with the key theme being to ‘help disabled people do the best they can and take part in their local area’ – the work of MLMC strongly meets this theme. The user-led trustee team have stated that they want to encourage the general public to see them in a positive light; as individuals who do want to work, be part of the community, and are much more than just a “burden to the taxpayer.” MENCAP’s 2012 report “Stuck at Home” identified that 1 in 4 people with learning disabilities spend less than one hour outside their home each day. The “Loneliness and Cruelty” report (Foundation for People with Learning Disabilities, 2012) showed 93% of those interviewed saying that they felt vulnerable and isolated. The different MLMC activities provide safe but challenging opportunities for lonely and isolated people to meet up and to be part of their community.

3. Our projects and why we do them

Champions – this work is core to what we do and what we are about; making sure that people with learning disabilities have a voice and that their views are taken seriously by wider society. The project supports and empowers people with learning disabilities (Champions) to better engage with and influence decision makers and hold them to account through meetings, consultations, lobbying and campaigning.

The Champions currently serve on many boards (e.g. Thames Valley Police Independent Advisory Board) and attend many consultations and meetings (e.g. local authority performance scrutiny) in their efforts to improve services. Oxfordshire County Council (OCC) and Comic Relief funding supports the Champions to make a real difference in this day to day work to help marginalised people with learning disabilities to be less subject to discrimination from public attitudes, laws, policies and services. The funding also supports the Champion’s annual campaigns; for example, our 2016 campaign focuses on championing a fair opportunity to access the workplace.

Groups – The charity runs 11 monthly self-advocacy groups throughout Oxfordshire for 130 regular attendees, giving our members a chance to meet up, to make new friends, to get out of their homes, to get advice, to talk about their interests, express their opinions and to learn new skills. These groups are the ‘life blood’ of our organisation and give an avenue for some of our most marginalised members to have a

'voice' – a core part of our mission. The views of our group members inform and guide the direction of our Champions project and the decisions of the charity trustees. Furthermore, the monthly group meetings address issues of exclusion and loneliness by providing a safe meeting place where beneficiaries discuss, learn about, and practice such things as safety, independence, art, self-improvement, and how to speak up for themselves.

Power Up – Predominantly through training workshops, consultations, film production, Easy Read translation and events, this project seeks to give trainers and their peers with learning disabilities a stronger voice in the community. The team earns fees, develops partnerships and trains professionals/ service-providers to help improve the services to Oxfordshire's learning disabled community; furthermore they help to provide self-advocacy training to the charity's 150+ monthly group members. Power up is very closely connected to our Champions' work and as such is core to what we do. The trainers with learning disabilities are paid for their work. The project has historically shown itself capable of attracting fees and grant funding to be financially self-supporting. Recent times have seen this area of work expand and the trustees are keen to see this trend continue.

Inspections – An area of growth has been our 'experts by experience' work whereby beneficiaries are paid to inspect services; in early 2015 MLMC won a contract worth £27,000pa with OCC which provides paid work opportunities for 5 'experts' to inspect approximately 35 local services pa. Additional inspections work has been secured with the Care Quality Commission through a sub-contract with Choice Support and once the work is up and running we expect there to be between 8-10 inspections per month in the Southern Region. We continue to partner NHS England in completing Care and Treatment Reviews and have recently been training more inspectors and staff so that we can do more of this work. The inspection work allows our 'experts by experience' to have a direct say in how services are run and a voice in how they should be improved.

Travel Buddy – Largely funded via small Trusts and Foundations our travel buddy scheme which commenced in 2010 is designed to "*enable people with learning disabilities to develop skills, knowledge and confidence in travelling independently using public transport or on foot using a peer mentoring 'buddy' system.*" Our travel buddies learn new skills and through training their peers and getting paid, gain a real sense of achievement and self-worth and feel they are making a real contribution within their local communities. For the trainees, overcoming the barriers to independent travel can open up a whole range of new opportunities; socially to meet friends at the cinema, to go bowling, to meet for a drink or go out for a meal, and also as a prerequisite for getting and maintaining volunteering or paid work. Finally, the scheme saves the tax payer money as the trainees who successfully learn how to travel independently no longer require more expensive travel support e.g. taxis or being picked up by minibus.

StingRay - The monthly StingRay nightclub (named after one of the charity's founders Raymond Metcalfe), established in 2007, attracts over 120 people with learning disabilities to each event. As well as providing a fun environment for isolated people to meet new friends and learn new skills (as DJs, for example) the nightclub hosts live bands and dance groups performed by people with learning disabilities. A team of beneficiaries receive support to manage the project, taking care of financial matters, safety, and PR – they make all the key decisions. Oxford's "Plush Lounge" provides the venue, and My Life My Choice receives an annual income through entrance fees of £4000 from the project – an initial grant from the Arts Council in 2007 provided the 'start-up' finance.

StingRadio – the project finished runner-up in the Big Lottery's Jubilee People's Millions competition 2011 and has since developed into one of only three such innovative radio-shows nationally and has broadcast fortnightly for over 4 years. The show features music, advice, information and comment by a team of 24 people with learning disabilities. Local councillors, officials, politicians, and celebrities are interviewed by DJs with learning disabilities. The show is listened to by people with learning disabilities, family carers, support workers, and sector professionals. Originally funded by the Office for Disability and OCC's Big Society Fund the project now relies upon being financed from the charity's general reserves.

4. Our key achievements during 2015/16

- Beneficiary Kevin Preen appears on BBC2's Newsnight to highlight the death of Oxford resident Connor Sparrowhawk; a young man with learning disabilities who died of neglect whilst under the care of Southern Health NHS Trust. Also, the charity's campaign film about Connor's death, which has to date received 15,000 on-line views, is being used by the Open University as part of their Health & Social Care course.
- A team of five trustees with learning disabilities planned, developed and delivered the MLMC "100 club" fundraising initiative. In the first year £600 has been raised.
- Three beneficiaries chosen by NICE (National Institute for Health and Care Excellence) to serve as paid members of a lay committee tasked with producing guidelines for models of service delivery for people with learning disabilities and behaviour that challenges.
- Completed a user-led training film for health professionals with Dominic Slowie (National Clinical Director for Learning Disabilities, NHS England).
- On-going annual training contract secured with University of Hertfordshire.
- Trustee and beneficiary Paul Scarrott spoke recently in a 'live' studio interview for Channel 5 News about NHS England's plan to develop community services and close inpatient services for people with learning disabilities in response to the Winterbourne View abuse scandal.
- MLMC trustee Shaun chairs conferences for National Development Team for Inclusion.
- Two Champions serve as consultants on the Oxfordshire Transforming Care Board.

5. Awards

- Guardian Charity of the Year 2010
- Oxfordshire Community Empowerment Award 2010
- Oxfordshire charity awards Most Creative Fundraising Work 2011
- National NHS Equality Award for “True partnership working” 2012
- Oxfordshire Community Foundation ‘Diamond Jubilee’ Award 2012
- Trustee, Richard West awarded an MBE in the Queen’s 2013 honour list for services to disabled people
- Two beneficiaries, Tommy and Tyrone, received an Enterprise Award 2013 (Oxfordshire Youth Awards) for their work in helping to develop ‘StingTeens’ (a nightclub event for young people with learning disabilities).
- 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. From support using public transport to club nights, My Life My Choice 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 in the charity is making.”*
- MLMC wins Oxfordshire Charity of the Year 2016.
- Beneficiary and trustee Michael Edwards wins highly commended Oxfordshire Volunteer of the Year Award 2016.
- Dr Martin Dare-Edwards, Charity Mentor and Business Catalyst Ambassador for UK Trade & Investment (UKTI) in June 2015 helped develop this 3 year Strategic Plan and he said, *“Following my review of the organisation’s strategy and risk planning I am happy to conclude that MLMC is a brilliant charity that is extremely well-run, well-supported, and is substantially resilient.”*

Broad strategy (2015-2018)

The MLMC trustees, who are annually elected by the membership, have requested that the next 3 years brings a period of consolidation whereby the charity concentrates on increasing beneficiary numbers, improving financial sustainability and improving the quality of our current projects.

The trustees’ direction for improvement identifies the following key areas;

1. Increase the number of self-advocacy monthly groups and the number of beneficiaries attending them.
2. Increase the number of attendees at the StingRay nightclub.
3. Ensure more pay is directed to people with learning disabilities through the charity’s paid work opportunities.
4. Increase the number of beneficiaries involved in the transport buddy scheme.
5. Increase income through the Power Up (film work, training and consultancy) project.
6. Diversify income streams.
7. Increase unrestricted + contingency reserves to £100,000
8. Increase the number of beneficiaries involved in volunteer work.
9. A bigger office
10. Even more news about our work in the papers, on the radio, on the internet, and on TV.

The Chiltern Centre for Disabled Children		Ref	SRev\52
Short break respite care, day services and afterschool/weekend services for disabled children and young people including specialist nursing care.			
Total cost (over four years)	£1,573,207	Amount requested (over four years)	£100,000
Previous grants: Capital grant – 2013 £14,896 kitchen improvements Revenue grant 2013/14 – 2016/17 £100,000 running costs (£25,000/year) Capital grants– 2010/11 £11,999 facility improvements Revenue grant – 2006/7 – 2012/13 £148,772 (average £21,253/year)			
District ward areas covered: All areas			

Scoring

Does the grant reduce each year?		
Yes, but the grant reduces by less than 10 per cent per year (it reduces by around £2,000 each year).	Score	1/2
Long term financial plan		
Their financial forecast covering the four years predicts they will make losses in years three and four, which is concerning.	Score	1/2
Do they have at least one year's running costs in reserve?		
Their policy is to have at least three month's costs in reserves at all times, which was £127,753 in 2015. They had nearly double this.	Score	1/2
Have they covered their costs for the last two years?		
They made a surplus in one of the last two years, but a loss in the other.	Score	1/2
What are their other funding sources?		
The majority of their income each year comes from client contributions, with an additional £100,000 coming from grants, donations etc. None of this funding is secured on an ongoing basis.	Score	1/2
Evidence of local need		
Equality officer: Very good clear evidence of local need for this service (suggested score 2 points). Grants officer: There is good evidence of need for their services.	Score	2/2
Working with our corporate priorities		
Equality officer: Very high levels of contribution towards the council's equality objectives (suggested score 2 points). Grants officer: This service offers good contribution towards our equality objective to help deliver better outcomes for disadvantaged groups and offers some contribution to the Thriving Communities action by encourage volunteering.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation encourages volunteering and has a volunteering policy. They have received a number of awards in recognition of their volunteering efforts.	Score	1/2
What evidence is there that their service is the best solution to the need identified?		
Equality Officer: Significant levels of evidence and support that this is the best solution to meet the identified need (suggested score 2 points). Grants Officer: They are an established provider of this type of service in their location so are well placed to meet the need.	Score	2/2

How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Strong support for this service (suggested score 2 points). Grant officer: There is strong support for this organisation and the work they do.		Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
Their service will provide 54,590 hours of care over the four year period, a total cost of £28.82 per hour of care. Their organisational targets are also reasonable.		Score	2/2
How achievable/reasonable is their project delivery/development plan?			
Their project plan seems reasonable and achievable.		Score	2/2
What is the funding for?			
Core costs to continue to deliver their existing services.		Score	0/2
Total score	20/26	Recommended Grant	£100,000

Applicant responses	
<p>How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?</p>	<p>Review of local data within South Oxfordshire, cross referencing 2011 Census Data with Public Health England Learning Disability Profiles suggest the following nos. of children reside in South Oxfordshire</p> <ul style="list-style-type: none"> • Children with severe learning difficulties 76 (2014) vs 71 (2009) an increase of 7% • Children with Autism 274 (2014) vs 131 (2009) an increase of 209% • Children with learning disabilities 1,103 (2014) <p>With an average 1.8 children per household including siblings 1,990 children/young people are in need of family support.</p> <p>The Chiltern Centre works in close partnership with all agencies responsible for health and wellbeing including social service, education providers (e.g. Bishopswood School, Henley College and ASDAN) and healthcare in both the statutory and voluntary sectors. Services are planned and delivered in liaison and discussion with them.</p> <p>The work of The Chiltern Centre is planned and developed taking into account the views of children/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.</p> <p>Children's feedback is actively sought. As all the children/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.</p> <p>The board of trustee maintains a diverse portfolio of skills and expertise which have included</p> <ul style="list-style-type: none"> - a lawyer specializing in medical negligence at birth (a fast growing sector within disability owing to improved life support and assistance technology - a local authority autism partnership manager from a neighbouring council - parent advisers who have disabled young adults - an adult care provider <p>along side the business, finance, HR and legal skills required to run the charity.</p>

	<p>MENCAP locally identified the skills the Chiltern Centre has as unique beyond their own skills and remit. They support and advocate our aims.</p> <p>Data Sources National Data</p> <ol style="list-style-type: none"> 1. Papworth Disability Facts and Figures 2016 2. Mencap: Short breaks support is failing family carers 3. Disabled Living Foundation 4. Contact a Family www.cafamily.org.uk 5. Family Resource Survey 2014/15 <p>Local Data</p> <ol style="list-style-type: none"> 1. South Oxfordshire District Council Census 2011 www.ons.gov.uk/census 2. Neighbourhood Statistics: Office for National Statistics www.neighbourhood.statistics.gov.uk 3. Insight Oxfordshire www.insight.oxfordshire.gov.uk/census 4. Public Health England https://www.gov.uk/government/organisations/public-health-england
<p>Why is your service is the best solution to meet this need?</p>	<p>The Chiltern Centre can demonstrate financial sustainability, having been providing short break care locally for over 10 years. The care is respected by the wide range of healthcare and education professionals with whom we work in partnership.</p> <p>We are unique in employing paediatric learning disability nurses. They provide clinical support for children with complex health issues and are able to assist with training our non-nursing staff to ensure good standards of health practice at all times.</p> <p>Nursing staff communicate with doctors, paediatricians, acute care services, community nurses, physiotherapists and speech and language therapists.</p> <p>Many of our families refer to us as an extended family that provides an “absolute lifeline”, giving practical help, support and peace of mind.</p> <p>The only alternative care provider for children with these medical needs is up to 60 miles away at a children’s’ hospice (whose primary focus is end of life care) or within hospital (which meets only medical needs, not social and recreational as provided by The Chiltern Centre).</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The Chiltern Centre supports families from across South Oxfordshire who have a child and/or young people with severe 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 including cerebral palsy. 80% of the children require at least 1:1 care, some 2:1 and some even 3:1. The physical and emotional demands of caring for a disabled child can be very challenging, often putting significant strain on family life. Our specialist short break services, helps reduce the pressures that can cause significant stress within the family and, in some cases cause family breakdown. Public Health England Learning Disability Profiles suggest the following nos. of children reside in South Oxfordshire</p> <p>Children with severe learning difficulties 76 (2014) vs 71 (2009) and increase of 7%</p> <p>Children with Autism 274 (2014) vs 131 (2009) an increase of 209%</p> <p>Children with learning disabilities 1,103 (2014)</p> <p>With an average 1.8 children per household including siblings 1,990 children/young people are in need of family support.</p>

Applicant's financial forecast - The Chiltern Centre for Disabled Children

	2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this	£441,260	£415,443	£425,028	£425,782	£424,093
Expenditure	2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs					
Care staff	129,470	133,031	135,691	138,405	141,173
Admin staff	87,170	89,170	90,953	92,773	94,628
Fundraising staff	30,098	28,688	29,262	29,847	30,444
Training and development	6,998	7,191	7,335	7,481	7,631
Expenses - Mileage re-imburement	72	72	72	72	72
Agency fees and other related employment costs	26,244	26,966	27,505	28,055	28,616
Recruitment	12,247	12,584	12,836	13,092	13,354
Building costs					
Rent/mortgage	0	0	0	0	0
Business rates	0	0	0	0	0
Gas	1,244	1,321	1,361	1,402	1,444
Water	518	551	567	584	602
Electricity	1,694	1,799	1,853	1,908	1,966
Services					
Total					
Waste collection/disposal	740	693	707	721	735
TV license/packages	166	166	166	166	166
Wi-Fi/broadband (- within IT/Comp costs)	0	0	0	0	0
Phone Line	1,521	1,410	1,438	1,467	1,496
Building maintenance	8,916	9,006	9,187	9,370	9,558
Cleaning	1,110	1,039	1,060	1,081	1,103
Alarm/Emergency lighting maintenance	64	64	66	67	68
Legal Costs for staff contracts etc	0	0	0	0	0
Window cleaning/land scaping	0	0	0	0	0
Photocopier	2,505	2,322	2,369	2,416	2,465
IT/Comp Costs	3,936	3,650	3,722	3,797	3,873
Outings & Travel Cost	6,215	5,869	5,988	6,109	6,232
Play Equipment	5,239	4,951	5,050	5,151	5,254
Medical Supplies	116	110	112	114	117
Supplies, equipment and consumables					
Stationery and postage (& printing)	984	912	931	949	968
ICT development	0	0	0	0	0
Meetings costs	0	0	0	0	0
Publicity and marketing	0	0	0	0	0
Furniture, equipment and maintenance	3,758	3,796	3,872	3,949	4,028
Food	4,317	4,042	4,123	4,205	4,289
Professional costs					
Building Insurance	1,413	1,413	1,442	1,471	1,500
Trustee Insurance	1,413	1,413	1,442	1,471	1,500
Public/Employee Liability & Personal Accident	1,413	1,413	1,442	1,471	1,500
Professional fees - Auditors	2,272	2,282	2,328	2,375	2,422
Annual Memberships (eg. Ofsted/CQC/Asdan)	4,213	3,693	3,771	3,849	3,930
Other costs					
Fundraising Costs	11,705	11,157	11,380	11,607	11,839
Depreciation	20,158	20,866	21,283	21,709	22,143
Total Expenditure (B)	£377,929	£381,642	£389,311	£397,136	£405,118
Income	2016/17	2017/18	2018/19	2019/20	2020-21
Generated income					
Revenue from Services	231,071	263,750	269,026	274,406	279,894
Earned income (charity shops, fees for training etc)	0	0	0	0	0
Contracted services	0	0	0	0	0
Donations, grants and fundraising					
Grants from local council Yr 1	25,000	28,000	26,000	24,000	22,000
Grants from philanthropic foundations/organisations	5,186	9,476	4,040	5,040	6,040
Fundraising income from community / events	30,000	30,000	30,000	30,000	30,000
Other donations	60,855	60,000	61,000	62,000	63,000
Other income					
Income from interest on reserves, endowment funds	0	0	0	0	0
Total Income (C)	£352,112	£391,227	£390,066	£395,446	£400,934
Balances at year end (i.e. line A - line B + line C)	£415,443	£425,028	£425,782	£424,093	£419,909

Applicant's project delivery/development plan - The Chiltern Centre for Disabled Children

Project Delivery and Development Plan

Background

The Chiltern Centre has provided short break care for families from across South Oxfordshire who have a child and/or young people with severe 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 including cerebral palsy. 80% of the children require at least 1:1 care, some 2:1 and some even 3:1.

The physical and emotional demands of caring for a disabled child can be very challenging, often putting significant strain on family life. Our specialist short break services, helps reduce the pressures that can cause significant stress within the family and, in some cases cause family breakdown.

Our vision

Families in South Oxfordshire District Council with a child/children with learning disabilities and possible complex medical conditions feel supported to meet the challenges they face, informed and confident to make decisions that are right for them.

Our role

We are there to support the family around the disabled child – our short break care is as important for the wider family as it is for the child/young person we support.

We are a direct line of support and information for the family, directing families to appropriate support and services provided by complementary organisations eg Mencap, Camp Mohawk, Thames Valley Adventure Playground.

Strategic Aims 2017/2021

1. Develop a sustainable business model to expand the service we offer by growing top-line revenue and reducing the fundraising requirement to a sustainable level, focusing on establishing a higher value of revenue relative to the amount of subsidised care.
 - a. Provision of ASDAN education programme aimed at young adults unable to access college placements. It teaches life skills and increases independence. Adult social care is better funded than children's services and short- break care for this age-group is under-served.
 - b. Working in partnership with other organisations to deliver specialist care and social opportunities e.g. running a youth group on behalf of The Henley Youth Group
 - c. High-value placements from Local Authorities. Local authorities recognise the Centre's expertise in the management and care of more medically challenging cases. These cases normally require two to one supervision and because LA's have few options for placing such cases, referrals to The Chiltern Centre will be paid for at full-cost.

- d. Children and young persons who have been awarded high-value awards in settlement of medical negligence cases, parents are looking to obtain the *best possible care*.
2. Increase the numbers of families supported in South Oxfordshire District Council adding 2 new families each year, 8 in total by 2021.
 3. Agree measurable outcomes and a monitoring and evaluation plan to ensure care is valued by service users and their families.
 4. Continue to build stronger networks through partnerships with complementary organisations, beginning with those identified through the grant application process i.e
 - a. Nomad Youth & Community Project, Thomley, Style Acre, My Life My Choice for service provision
 - b. Riverside Counselling Service, Home-Start Southern Oxfordshire for potential wider family support
 - c. Further development of the partnership of South Oxfordshire Food and Education Alliance for cost savings and buying efficiencies
 5. Fundraising focus on:
 - a. building a regular giving programme to build unrestricted income levels to a minimum of £20k annually by 2021.
 - b. Upscaling fundraising events by working in partnership with complementary and geographical appropriate charities eg Headway, Sue Ryder

Evidence of Local Need

Public Health England Learning Disability Profiles suggest the following nos. of children reside in South Oxfordshire

- Children with severe learning difficulties 76 (2014) vs 71 (2009) an **increase** of 7%
- Children with Autism 274 (2014) vs 131 (2009) an **increase** of 209%
- Children with learning disabilities 1,103 (2014)

With an average 1.8 children per household including siblings **1,990 children/young people** are in need of family support.

National Disability Statistics & Impact

1. Numbers & Anticipated Growth

- a. In 2012/13, 7% of children were disabled (0.9 million)
- b. Disabled children aged 0-16 are the fastest growing group among the population of disabled people.
- c. It is widely anticipated that the proportion of children and young people who are disabled will increase. It is estimated that there will be over 1.25 million children reporting a disability by 2029. The reasons include improved diagnosis, reduced stigma in reporting disability, and better survival rates for pre-term infants.

- d. It is estimated that there will be 450,000 children and young people (aged 0–19) with learning disabilities in the UK by 2031, a 10% increase from 410,000 in 2011.
- e. The number of people with 3 or more long term conditions is predicted to rise from 1.9 million in 2008 to 2.9 million in 2018.
- f. By 2030 it is estimated that the number of younger adults with learning disabilities may rise by 32.2%, as mortality among people with learning disabilities and children with severe and complex needs has reduced in recent years.

The Chiltern Centre is geographically unique in being able to meet the increasing complex needs of the growing severity and complexity needs, employing nursing staff.

- 2. Type of Disability-** For disabled children, the most common impairments are social and behavioural (33%), learning disability (31%)

The Chiltern Centre focuses on the support of children/young people with learning and behavioural disabilities

3. Education

- a. At 19 years of age, disabled young people are twice as likely as their non-disabled peers to not be in any form of education, employment or training (NEET), 28% compared to 13%.
- b. Between the ages of 16 and 19, disabled people are more likely than non-disabled people to be in the NEET group at least once (33% compared to 24%).

The Chiltern Centre is unique geographically in being licensed to deliver the ASDAN programme. This is a life skills programme for young adults who are unable to access a college education. It's primary focus is to facilitate independence.

4. Vulnerability

- a. Disabled people are significantly more likely to be victims of crime than non-disabled people. This gap is largest amongst 16-34 year-olds, where 39% of disabled people reported being victims of crime, compared to 28% of non-disabled people.
- b. More than 80% of 16 year olds with a statement of Special Educational Needs or disability have reported being bullied, compared to less than 66% of non-disabled young people.
- c. 9 out of 10 people with a learning disability have been a victim of hate crime and bullying.
- d. Children with a learning disability are often socially excluded and 8 out of 10 children with a learning disability are bullied.

The Chiltern Centre facilitates the development of life skills and appropriate behaviours including keeping safe through the ASDAN project and Buddies youth groups.

5. Lifestyle Issues

- a. People with a learning disability are more likely to be obese (28.3% compared to 20.4% of the remaining population).
- b. Disabled people are less likely to participate in sport, compared to those without a longstanding illness or disability (29.3% versus 51.4%).

Healthy eating and exercise are parts of the focus on Chiltern Centre youth groups, work and care with young adults

6. Poverty

- a. The annual cost of bringing up a disabled child is 3 times greater than that of bringing up a non-disabled child.
- b. 19% of households that include a disabled person live in relative income poverty (below

- 60% of median income), compared to 14% of households without a disabled person.
- c. 40% of disabled children in the UK live in poverty. and almost a third of those are classified as living in 'severe poverty'.
 - d. Children in families containing 1 or more disabled person are twice as likely to live in households with combined low income and material deprivation as those in families with no disabled person (22% compared to 10%).
 - e. 38% of disabled children living in workless households, compared to 16% of all children.
 - f. Disabled children are amongst the most likely to experience poverty.
 - g. 84% of mothers of disabled children do not work, compared with 39% of mothers of non-disabled children. Only 3% of mothers of disabled children work full time and 13% work part time.
 - h. 1 in 6 families (17%) with disabled children go without food, 1 in 5 (21%) go without heating, 1 in 4 (26%) go without specialist equipment or adaptations, and 86% go without leisure activities.
 - i. About 60% of children and young people with learning disabilities and mental ill health live in poverty.
 - j. **Half** of family carers say that their caring situation has led to them giving up work altogether or seriously considering doing so.
 - k. **9 out of 10** people who responded to our survey provided more than 10 hours of care every day. Given that this amounts to many more hours than a full-time job,

Financial pressures impacts on carers' stress and quality of life – The Chiltern Centre Care is organised around the family recognising, that the short break is as important for the wider family as it is the child/young person.

7. Impact of Stress & importance of support

- a. More than **7 out of 10** family carers who responded to our survey provide more than 15 hours of care each day.
- b. 99.1% of disabled children live at home and are supported by their families, and only 1 in 13 disabled children receive a regular support service of any sort from.
- c. 65% of families caring for disabled children reported feeling isolated frequently or all of the time –56% felt that the cause of their isolation was due to a lack of support
- d. 90% are worried about cuts to the local services that they need.
- e. 7 out of 10 families caring for someone with profound and multiple learning disabilities have reached or come close to 'breaking point' because of a lack of short break services.
- f. **8 out of 10** family carers have reached, or are close to reaching, breaking point due to a lack of short breaks.
- g. **8 out of 10** people feel they do not get enough short breaks.
- h. A total of **7 out of 10** carers say they do not receive services that fully meet their family's needs.
- i. **8 out of 10** family carers claim that a lack of short breaks has had a negative impact on their family life.
- j. Almost **8 out of 10** people said they have found family life harder due to a lack of short breaks, and many say their marriage or other children are affected.
- k. **9 out of 10** people also said not getting enough short breaks has affected their social life, with many telling us they feel "lonely" and "isolated". Many carers suffer from a lack of sleep because of night-time caring, which adds to their stress and anxiety.

Breaks are an essential part of the support needed by the whole family. They provide much-needed time off for the carer to rest and focus on other activities and family members, and a chance for those they care for to spend time with others and take part in different activities.

Siblings also experience the impact of their family's caring responsibilities. This is not just in terms of providing direct care for their brother or sister, but also in terms of experiencing reduced attention and time with their parent(s), who may be almost solely occupied by caring for their sibling with a learning disability. This can lead to feelings of resentment, which impacts on their own development.

The Chiltern Centre Care is organised around the family recognising, that the short break is as important for the wider family as it is the child/young person.

8. Expertise

- a. Given the diverse and individual needs of the families involved, it is particularly important that these services are flexible in their delivery and are staffed by well-trained professionals.
- b. 75% of GPs have received no training to help them treat people with a learning disability.
- c. 93% of GPs would recommend special training on learning disability to all health professionals.

The Chiltern Centre is unique in employing paediatric learning disability nurses. They provide clinical support for children with complex health issues and are able to assist with training our non-nursing staff to ensure good standards of health practice at all times. Nursing staff communicate with doctors, paediatricians, acute care services, community nurses, physiotherapists and speech and language therapists.

Data Sources

National Data

1. Papworth Disability Facts and Figures 2016
2. Mencap: Short breaks support is failing family carers
3. Disabled Living Foundation
4. Contact a Family
www.cafamily.org.uk
5. Family Resources Survey 2014/15

Local Data

1. South Oxfordshire District Council Census 2011
www.ons.gov.uk/census
2. Neighbourhood Statistics: Office for National Statistics
www.neighbourhood.statistics.gov.uk
3. Insight Oxfordshire
www.insight.oxfordshire.gov.uk/census
4. Public Health England
<https://www.gov.uk/government/organisations/public-health-england>

Thomley Hall Centre		Ref	SRev\34
Volunteering and apprenticeship programme that supports young people/adults to develop skills they can apply in their day-to-day lives and/or a working environment.			
Total cost (over four years)	£534,754	Amount requested (over four years)	£97,500
Previous grants: Capital grant 2014/15 £100,000 new café and social area Revenue grant 2013/14 – 2016/17 £100,000 (£25,000/year) Capital grant 2010-11 - £100,000 teenage provision Capital grant 2008/9 - £17,940 facility improvements Revenue grant 2008/9 – 2012/13 £ 93,000 (average £18,600/year)			

District ward areas covered:

All areas

Scoring

Does the grant reduce each year?		
The grant request reduces very slightly over the four years.	Score	1/2
Long term financial plan		
The financial plan provided shows a considerable increase in expenditure (up from £475,239 in 2015 to £611,035 in 2020).	Score	1/2
Do they have at least one year's running costs in reserve?		
No, the organisation intends to hold reserves of six months running costs and held cash reserves at 31 August 2015 of only four months.	Score	0/2
Have they covered their costs for the last two years?		
The organisation made a small profit in 2014 but a profit of £191,112 in 2015.	Score	1/2
What are their other funding sources?		
The organisation has identified £560,000 of other funding sources, £256,918 is secured.	Score	1/2
Evidence of local need		
Equality officer: There is some evidence of local need, but it is not clearly identified and there is some uncertainty around the actual service - are they apprenticeships (for a specific qualification) or work experience? However, we recognise how important providing work experience opportunities to people with disabilities is (suggested score - 2 points).	Score	2/2
Working with our corporate priorities		
Equality officer: We have worked with this organisation previously and their whole operation contributes to our equality objective around better outcomes for disadvantaged groups and fostering good relations between different groups of people (suggested score 2 points).	Score	2/2 (counts as 4 points as weighted scores)
Grants officer: This service will contribute to the 'jobs for everyone and thriving communities' priorities as well our equality objective to help support communities to deliver better outcomes for disadvantaged groups.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation has a volunteer policy and actively welcomes volunteers. It is unclear how many are regularly active volunteers but some of the volunteers are those with disabilities.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Equality officer: Any project that offers work experience to people with disabilities is a positive activity. This organisation exists to support people with	Score	2/2

disabilities so they are very well placed to deliver this project (suggested score 2 points).		
Grants Officer: The facilities they offer are very specialised and demand is high for the existing services they offer.		
How well do other agencies / council staff support the service this organisation provides?		
Equality officer: Definite support for this organisation (suggested score 2 points).		
Grants Officer: We have supported this organisation for many years and seen it grow and become more established.	Score	2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		
The targets are rather unclear and in 2017-18 appear quite low.	Score	1/2
How achievable/reasonable is their project delivery/development plan?		
The project plan is very brief.	Score	1/2
What is the funding for?		
The funding will enable a volunteering and apprenticeship programme for young people of all abilities, but especially those with additional needs, to gain work experience across all aspects of the work at Thomley. It will also help to create opportunities for groups to undertake specific tasks.	Score	1/2
Total score	19/26	Recommended Grant
		£97,500

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>Thomley has been providing services for disabled people, their families, friends and carers for over 12 years. It has been providing these services for people with learning, physical, medical and complex impairments. Thomley is unique in that it welcomes disabled people of all ages and impairments. Throughout its history, it has built up a:</p> <ul style="list-style-type: none"> • comprehensive knowledge base of disability and the impact this has on the person and those who provide day to day care and support • knowledge base of the range of services provided across the authority in relation to disabled people • positive working relationships with other providers of disabled services <p>Thomley has undertaken the following activities.</p> <p>Surveys/consultations</p> <p>Thomley undertakes annual and ad hoc surveys. These surveys set out questions it believes will elicit a broad view of what our visitors see as important to them. These surveys focus on questions that provide:</p> <ul style="list-style-type: none"> • an overview of who and how our services are used • an assessment of the outcomes/impact our service has for people visiting the centre • a view on gaps in service and future direction for meeting those gaps <p>Day-to-Day discussions with visitors</p> <p>Our operations team holds regular discussions with our visitors. They capture comments about activities, ideas for future events and views about the way they are treated and supported in using the centre. Our service manager collates these comments and Thomley uses this information to guide the senior team on future investment/development. For those visitors who do not have verbal skills, our operation staff observe visitors taking part in activities to understand areas for future improvement/development.</p>

	<p>Reviewing research and strategic plans Both nationally and locally, plans have identified a need for better/increased leisure opportunities for disabled people of all ages and specifically those aged 18 years plus. Outcomes from a recent Case for Play inquiry chaired by former Education Secretary Lord Blunkett include:</p> <ul style="list-style-type: none"> • Disabled children were missing out on play opportunities vital to their emotional, social and physical development. • Insufficient funding at a local level and negative attitudes to disabled children and their families are significant barriers. • A snapshot survey of the families revealed nine out of 10 felt their child did not have the same chances to play as other non-disabled children. <p>Lord Blunkett also said:</p> <ul style="list-style-type: none"> • "We know that play is vitally important for children with multiple needs and their families, bringing a wide range of developmental and emotional benefits." ... • "However, our inquiry found that all too often the parents of children with multiple needs point to barriers they face in accessing and enjoying play. • "It means that disabled children don't have the same chance to form friendships, and parents are prevented from taking a break from caring." • "Both disabled children and their parents are excluded from their own communities." <p>By focusing on volunteering and apprenticeships, Thomley will be able to continue to provide, improve and expand our offering to disabled people, their families/friends and the wider community.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Thomley is best place to deliver this project for the following reasons:</p> <p>Locally Based It has been providing services for disabled people for over 12 years within this locality. In doing this, it has:</p> <ul style="list-style-type: none"> • built up an understanding of the needs and requirements of disabled people who have a range of learning and physical impairments • created a positive reputation in the area for the services it provides. <p>Past experience Thomley currently supports a handful of disabled young people in a volunteering capacity. This project is design to extend this work so we engage with a wider section of the community that has been identified through our research.</p> <p>Providing positive learning opportunities Thomley can provide a wide range of opportunities from hands on to technical experiences. It is able to set and adapt tasks to meet volunteer's skills/abilities and then stretch these to enhance the person's learning experience.</p> <p>Currently a number of Thomley volunteer cohorts have gone into paid employment with us as well as into local businesses as a direct result of their volunteering experience.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Thomley is unique in that it provides services for disabled people from birth to throughout their lives. We have visitors aged in the 70's visiting here on a regular basis.</p> <p>The majority of our visitors are between 5 years and 19 years old. Following this would be young to older adults. Older adults is a new service for us that has been going for just over a year. This is an area where we have seen a steady rise in visits since introducing this service. In addition, Thomley provides much valued support to the families, friends and carers of the disabled persons.</p> <p>Throughout the year, Thomley holds community days where the centre is open to disabled and nondisabled people, their families, friends and carers. Doing this provides practical experience for the wider community where they build their knowledge and understanding of disability and the impact this has for the person and their family. Experiences here are transferred to the wider community.</p>

	<p>Thomley also provides a variety of events that are open to all members of the community. By doing the above, Thomley believes it is contributing to breaking down barriers, developing understanding that contributes to improving social cohesion.</p>
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Applicant's financial forecast – Thomley

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this		£148,000	£126,627	£152,277	£152,433	£153,678
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	455112	£350,000	£367,500	£385,875	£405,200
	Training and development (all staff and volunteers)	£7,525	£7,900	£8,295	£8,700	£9,135
	Expenses					
	Agency fees and other related employment costs	3200				
Building costs	Rent/mortgage	£20,604	£20,604	£20,604	£20,604	£20,604
	Business rates					
	Heat/Light/Water	£11,525	£12,200	£12,600	£13,230	£13,900
	Hygiene and security	£12,249	£12,900	£13,545	£14,300	£15,100
	Repairs and Renewals	£22,238	£25,000	£26,250	£27,600	£29,000
	Vehicle	£1,212				
Services	Total					
	Project facilitators and materials	£10,506	£15,000	£15,750	£16,600	£17,500
Supplies, equipment and consumables	Furniture, equipment and maintenance	£4,329	£6,500	£6,825	£7,166	£7,525
	Refreshments	£1,200	£1,500	£1,575	£1,655	£1,740
	Communication Incl IT	£12,076	£5,000	£5,250	£5,500	£5,775
	Publicity and marketing	£9,949	£10,000	£10,500	£11,025	£11,576
	Office consumables	£2,188	£2,200	£2,310	£2,400	£2,500
Professional costs	Building Insurance)					
	Trustee Insurance)	£12,401	£15,000	£15,750	£16,500	£17,400
	Public/Employee Liability & Personal Accident)					
	Professional fees (accountants, legal, HR etc	£8,696	£9,000	£9,450	£9,900	£10,400
	Fundraising costs	£9,422	£9,300	£9,765	£10,300	£10,900
Other costs	Card charges	£402	£500	£525	£550	£580
	Governance	£50	£150	£200	£200	£200
	Capital Loan repayment	£31,136	£32,000	£32,000	£32,000	£32,000
	Total Expenditure (B)	£636,020	£534,754	£558,694	£584,105	£611,035
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training)					
	Contracted services from local authorities and other organisations	£19,788				
	Rent Contribution	£5,600	£5,600	£5,600	£5,600	£5,600
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£45,212	£20,000			
	Grants from philanthropic foundations/organisations	£438,370	£430,000	£439,000	£460,000	£482,000
	Fundraising income from community / events	£11,460	£12,000	£12,000	£12,000	£12,000
	Other donations	£13,000	£13,650	£14,000	£14,500	£15,200
	Individual donations	£74,990	£74,904	£84,000	£89,000	£92,000
Other income	Income from interest on reserves, endowment funds etc	£225	£250	£250	£250	£250
	Gift Aid	£6,000	£4,000	£4,000	£4,000	£4,000
	Total Income (C)	£614,645	£560,404	£558,850	£585,350	£611,050
	Balances at year end (i.e. line A - line B + line C)	£126,625	£152,277	£152,433	£153,678	£153,693

Applicant's project delivery/development plan - Thomley

Activity	Actions	Who	When
Staffing	<ul style="list-style-type: none"> Brief staff member on project plans and outcomes Confirm HR responsibilities for co-ordinating the project Recruit additional support staff for the project 	<ul style="list-style-type: none"> CEO HR Manger HR Manager 	<ul style="list-style-type: none"> April/May 2017 April/May 2017 April 2018
Publicity	<ul style="list-style-type: none"> Develop publicity leaflets, adverts etc. the project Promote project through social media Promote project through local radio 	<ul style="list-style-type: none"> Marketing HR/CEO HR/CEO 	<ul style="list-style-type: none"> May/July 2017 ongoing July ongoing July then 6 monthly
Training	<ul style="list-style-type: none"> Develop volunteering programme for each section of the charity: <ul style="list-style-type: none"> Fundraising Administration/Finance Social care 	<ul style="list-style-type: none"> Fundraising Finance Manager Service Manager 	<ul style="list-style-type: none"> August 2017 August 2017 August 2017 Review annually
Apprenticeships	<ul style="list-style-type: none"> Review and select appropriate programme for each area above Confirm and promote programmes 	<ul style="list-style-type: none"> HR Manager HR Manager 	<ul style="list-style-type: none"> August 2017 August 2017
Partnerships	<ul style="list-style-type: none"> Explore and create partnerships with: <ul style="list-style-type: none"> Local Apprenticeship Agencies Collaborant Oxfordshire Business Community Organisations Aspire OCVA volunteering section Local Schools re Duke of Edinburgh Jack Radio 	<ul style="list-style-type: none"> HR Manager CEO/Fundraiser CEO/Fundraiser Fundraiser CEO HR Fundraiser CEO/Fundraiser 	<ul style="list-style-type: none"> August 2017 ongoing May 2017 ongoing May 2017 ongoing May 2017 ongoing August 2017 ongoing Sept 2017 ongoing Ongoing

Age UK Oxfordshire		Ref	SRev\72
Connecting Communities service – offering older people in the district activities to build social, digital and creative connections.			
Total cost (over four years)	£2,569,735	Amount requested (over four years)	£99,999
Previous grants: Revenue grant 2013/14 – 2016/17 £86,000 (£21,500/year) Revenue grant 2008/9 – 2013/14 £107,000 (£21,000 in 2008/9 then £21,500 per year)			
District ward areas covered: All areas			

Scoring

Does the grant reduce each year?		
Yes, the grant amount reduces by over ten per cent each year. The grant is towards the Connecting Communities project only, which accounts for around 20 per cent of their total running costs each year. Our grant would account for less than one per cent of their total running costs each year.	Score	2/2
Long term financial plan		
They have a reasonable financial forecast, with much of their income coming in fees and contracted services. However, in 2015/16 over £2.5 million of their £3.1 million running costs was spent on staffing costs, with the cost of activities accounting for £205,000.	Score	1/2
Do they have at least one year's running costs in reserve?		
No, nor do they appear to meet their own accounting policy to retain at least six months of core costs.	Score	0/2
Have they covered their costs for the last two years?		
No, they made a small surplus in 2015 and a loss of more than twice this in 2016.	Score	1/2
What are their other funding sources?		
Most of their other income comes from contracted services and client fees, with other grants/charitable giving making up less than 25 per cent of their running costs each year. They have not specified specific funding sources for this charitable income and none of their income is guaranteed for more than two years.	Score	1/2
Evidence of local need		
Equality Officer: Good, strong evidence of local need to reduce isolation, increase access to IT and the arts (suggested score 2 points). Grants Officer: There is good external and internal research to support the general need for services for older people, especially loneliness in rural areas.	Score	2/2
Working with our corporate priorities		
Participation Officer: The project shows minor links to some of our corporate priorities (suggested score 1 point). Equality officer: High levels of contribution towards meeting the equality objective around meeting the needs of an ageing population (suggested score 2 points). Grants officer: Some contribution to our corporate priority to 'build thriving communities' and a high level towards our equality objective to meet the needs of an aging population.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
They attached a copy of their volunteer handbook instead of their policy. I am confident they have a policy, it just wasn't attached and suggest they are asked to provide it if we	Score	2/2

decide to fund the organisation. They encourage volunteers, with over 480 across Oxfordshire already.			
What evidence is there that their service is the best solution to the need identified?			
Equality officer: Good evidence of general need but the application is not clear, about what arts/cultural activities they will provide. Building on current provision like their cinema clubs and knit and natter sessions will still be beneficial (suggested score 1 point, but this could increase if they confirm what additional creative activities they will offer).		Score	1/2
Grants officer: There is some evidence their service could help meet the needs of older people in the district, but the application lacks detail about exactly what they will deliver as part of the Connecting Communities service.			
How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Strong support for this organisation who do a fantastic job in meeting the needs of the ageing population (suggested score 2 points).		Score	1/2
Grants Officer: The support for the whole organisation is good, but there is little specific support for this particular service.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
Some of the targets seem low, especially around the number of activities taking place each year. Two of their three operational targets are not really relevant to this application.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
Their project timeline did not include much detail about their activities and did not cover their development plans for the next four years, limiting their score.		Score	1/2
What is the funding for?			
To offer old people social and creative activities and digital training to help reduce loneliness. They currently offer some of these services/activities.		Score	1/2
Total score	18/26	Recommended Grant	£93,290

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

The cumulative evidence from many years' experience of successfully delivering services for older people in South Oxfordshire, local and national research and local consultation all suggest that our project should address three major needs: loneliness, digital exclusion and engagement with the arts.

Loneliness

- Age UK Oxfordshire was a founder member of Campaign to End Loneliness (CEL), established five years ago, to build the evidence base about prevalence and impact of loneliness and promising approaches to tackling it. This evidence underpins our work and this proposal in particular.
- Loneliness increases with age and with deterioration in an individual's health and mobility. It also links to low socio-economic status and limited contact with family as well as with caring responsibilities.
- 6 – 13% of people aged 65+ feel lonely often or always, rising to 30% in the 80+ population.
- Age UK and ONS have developed a tool which identifies neighbourhoods where older people are at high risk of loneliness, which allows us to target work.
- Feedback from the local volunteer centre in Berinsfield suggests that the impact of cuts in public transport mean older residents becoming more isolated / house bound.
- Loneliness impacts not only on mental health and wellbeing but on physical health too.
- There is evidence to suggest that asset based community development approaches, identifying people at risk of loneliness, listening to them and 'connecting' them to activities and opportunities, overcoming barriers to access (including IT and transport) are successful.

Digital exclusion

- Older people (especially those in the oldest age bands) are less likely than younger people to use the internet and are likely to use it less widely and less frequently.
- Analysis by Age UK in 2013 found that only 50% of people in Oxfordshire aged 65+ were online - those with lower economic wealth, living alone and / or in worse health less likely to be online.
- Over half of the 11m people in the UK lacking basic online skills are aged 65 and over.
- National research by Fujitsu in 2011 found that only 15% of older people had used their local council website to find information.
- Older people locally tell us about their difficulties accessing information and advice, shopping, paying bills, staying in contact with friends and family, writing to MPs.

Engaging with the arts

- Arts Council England 2015 research with older people showed: 76% say arts and culture important in making them happy, 57% say arts and culture is important in helping them meet other people, 60% say arts and culture is important in encouraging them to get out and about.
- An Arts Council 2014 evidence review concludes: 'the arts are an effective way to tackle loneliness' and shows that although cultural engagement has increased over recent years among 65+, there is a sharp drop among respondents aged over 75.
- The formal evaluation by Goldsmiths College of our intergenerational arts project 'The Voyage' showed significant increases in well-being and social bonding.

Why is your service is the best solution to meet this need?

Our project targets three specific areas of need, loneliness, digital exclusion and participation in the arts.
Each component of the project has been developed in consultation with

	<p>local older people, with partner organisations and drawing on evidence of what works elsewhere.</p> <p>Loneliness - we have based our approach on:</p> <ul style="list-style-type: none"> - our experience of working over many years in South Oxfordshire, listening to older people and partner organisations, and on - the recommendations of 'Promising Approaches to Loneliness', a significant piece of research conducted by Age UK and the Campaign to End Loneliness, which suggests that ways of reaching and listening to people are key, as well as having a digital strategy, a 'menu' of activities to connect people into and an asset based community development approach. Our projects incorporates all these. <p>Digital exclusion:</p> <ul style="list-style-type: none"> - we have several years experience of supporting older people to gain the confidence and skills to use technology and get online and over the last year we have worked with other national partners to hone our approach. The learning underpins our approach. <p>Arts participation:</p> <ul style="list-style-type: none"> - a pilot of the 'cultural connectors' approach has proved successful in Manchester: we have been able to build on their learning.
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The primary beneficiaries of our Connecting Communities project are the 20% of South Oxfordshire's population who are aged 65 and over, in particular the 8,800 people aged between 75 and 84 and the rising population of people aged 85+, which currently stands at 3,800.</p> <p>In particular, the project will target:</p> <ul style="list-style-type: none"> - the 6 - 13% of South Oxfordshire residents aged 65+ who feel lonely often or always - the 30% of residents aged 80+ who regularly feel lonely - older residents living in the neighbourhoods identified as being at high risk of loneliness on the Age UK / ONS loneliness map - the 50% of South Oxfordshire residents who are not yet online - the estimated 80% of older people who do not access the Council's website - the estimated 30% of residents aged 65+ who did not access at least one arts or cultural activity within the last year - South Oxfordshire residents who have some time to give and volunteer with the project. <p>In addition to the individual beneficiaries outlined above, South Oxfordshire communities will benefit from an increased understanding of the needs of older residents and its arts activities will benefit from greater participation from older residents.</p>

Applicant's financial forecast - Age UK Oxfordshire

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)			£103,368	£99,404	£95,400	£91,355
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	2,181,376	2,110,676	2,131,783	2,153,101	2,174,632
	Training and development (all staff and volunteers)	18,693	18,880	19,069	19,259	19,452
	Expenses	70,234	55,084	55,635	56,191	56,753
	Agency fees and other related employment costs	33,941	34,280	34,623	34,969	35,319
	Subcontractors	209,675	211,772	213,889	216,028	218,189
	Volunteers	23,972	24,212	24,454	24,698	24,945
Building costs	Rent/mortgage	60,340	60,943	61,553	62,168	62,790
	Business rates	3,800	3,838	3,876	3,915	3,954
	Gas, water and electric	6,480	6,545	6,610	6,676	6,743
Services	Total					
	Phone Line	44,130	44,571	45,017	45,467	45,922
	Building maintenance	6,200	6,262	6,325	6,388	6,452
	Cleaning	3,380	3,414	3,448	3,482	3,517
Supplies, equipment and consumables	Stationery and postage (incl printing)	81,169	81,981	82,800	83,629	84,465
	ICT development					
	Meetings costs					
	Publicity and marketing (design & print)	27,800	28,078	28,359	28,642	28,929
	Furniture, equipment and maintenance		0	0	0	0
	Computer supplies	26,886	27,155	27,426	27,701	27,978
Professional costs	Building Insurance (incl below)					
	Trustee Insurance (incl below)	1,300	1,313	1,326	1,339	1,353
	Public/Employee Liability & Personal Accident	7,400	7,474	7,549	7,624	7,700
	Professional fees (accountants, legal, HR etc)	50,660	51,167	51,678	52,195	52,717
	subs & pubs, conferences	6,225	6,287	6,350	6,414	6,478
Other costs	purchased goods	30,000	30,300	30,603	30,909	31,218
	sundry expenses	17,410	17,584	17,760	17,938	18,117
	bank charges	1,000	1,010	1,020	1,030	1,041
	depreciation	21,006	21,216	21,428	21,643	21,859
	activity costs	199,878	201,877	203,896	205,935	207,994
	Total Expenditure (B)	£3,132,955	£3,055,918	£3,086,478	£3,117,342	£3,148,516
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£0				
	Earned income (charity shops, fees for training)					
	Contracted services from local authorities and other organisations	£1,623,198	1,639,430	1,655,824	1,672,383	1,689,106
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£340,604	344,010	347,450	350,925	354,434
	Grants from philanthropic foundations/organisations	£100,087	101,088	102,099	103,120	104,151
	Fundraising income from community / events	£193,400	195,334	197,287	199,260	201,253
	Other donations	£68,200	68,882	69,571	70,267	70,969
	sponsorship	£19,000	19,190	19,382	19,576	19,771
Other income	Income from interest on reserves, endowment funds etc	£5,500	5,555	5,611	5,667	5,723
	client fees	£629,988	636,288	642,651	649,077	655,568
	sundry income	£49,610	50,106	50,607	51,113	51,624
Total Income (C)		£3,029,587	£3,059,883	£3,090,482	£3,121,387	£3,152,600
Balances at year end (line A - line B + line C)		-£103,368	-£99,404	-£95,400	-£91,355	-£87,271

Applicant's project delivery/development plan – Age UK

	Jan - March 2017 Planning and Preparation	April - June 2017 Implementation phase	July - Sept 2017	Oct 2017 - March 2018	April 2018 - March 2019	April 2019 - March 2020	April 2020 - March 2021
§ Recruitment of staff and volunteers							
Specification and advertising for staff requirements	January						
Interviews, appointment and start date	Feb/March						
Appointments & start dates	March / April						
Training needs assessment for new staff	March / April						
Induction / training of new staff	April						
Initial recruitment drive for volunteers	March / April						
Induction / training of volunteers	April						
Ongoing rolling programme of recruitment, training and support							
§ Management							
Management Group Meetings	January, March	April, June	Sept	Dec, March	Quarterly	Quarterly	Quarterly
Refine data collection mechanisms	February						
Refine mechanisms for seeking feedback from service users and partners	March						
Team Meetings		April	July	Sept, Jan	Quarterly	Quarterly	Quarterly
Management review of progress against targets and objectives		June	Sept	Dec, March	Quarterly	Quarterly	Quarterly
Management review of feedback		June	Sept	Dec, March	Quarterly	Quarterly	Quarterly
Action planning to respond to review		June	Sept	Dec, March	Quarterly	Quarterly	Quarterly
§ Marketing and communications key dates							
Develop marketing plan	March						

Management Group sign off / review Marketing Plan	March	April	Sept	Dec, March	Quarterly
Pre-launch comms / publicity	March				
Launch of new service		April			
§ Locality Planning					
Map existing activities, opportunities, services and support	[Redacted]				
Identify unmet needs and opportunities for development		[Redacted]			
Plan development of activities, IT classes / gadget drop-ins		[Redacted]			
Set up and deliver new activities		[Redacted]			
§ Collaborative partnerships					
Identify key provider/supporters of arts and creativity opportunities		April / May			
Local Partnership Network Meetings (partners and professionals)		April / May	Oct	April / Oct	April / Oct April / Oct
§ Sustainability					
Use asset based community development approach to embed activities		[Redacted]			
Work with volunteers on sustainability of their input beyond project life		[Redacted]			
Work with Arts partnerships on sustainability of creative activities		[Redacted]			

South & Vale Carers Centre		Ref	SRev\7
Provide social and practical support for young carers age 8-25 including respite trips, befriending schemes and training for young carers.			
Total cost (over four years)	£298,379	Amount requested (over four years)	£89,514
Previous grants: Revenue Grant 2013/14 – 2016/17 £100,000 (£25,000/year) Revenue Grant 2006/7 – 2012/13 £149,346 (average £21,335/year)			
District ward areas covered: All areas			

Scoring

Does the grant reduce each year?		
No, the organisation has requested 30 per cent of its running costs for each of the four years of the grant.	Score	0/2
Long term financial plan		
A detailed financial plan was provided with substantial growth in expenditure from £167,000 in year one to £411,564 by year four. The plan suggests that £200,000 income will be from contracts with local authorities and substantial funding from other philanthropic foundations or organisations.	Score	1/2
Do they have at least one year's running costs in reserve?		
Reserves at 31 March 2016 were £72,207 which is in line with their current reserves policy.	Score	1/2
Have they covered their costs for the last two years?		
The organisation has made a loss in the last two years of £86,716 in 2015 and £26,182 in 2016.	Score	0/2
What are their other funding sources?		
Other funding sources identified and estimated income for work in South Oxfordshire is £56,900 for 2017-18.	Score	1/2
Evidence of local need		
Equality officer: The service shows there is a clear need for their service to young carers (suggested score 2 points). Grants officer: The organisation has provided evidence of need by an estimated 2,000 young carers in South Oxfordshire.	Score	2/2
Working with our corporate priorities		
Equality officer: The service offers high levels of contribution to our equality objectives (suggested score 2 points). Grants officer: The service contributes to our equality objective to 'help deliver better outcomes for disadvantaged groups and encourage community cohesion'.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation has a strong volunteering policy and currently recruits five dedicated volunteers. They intend to increase the number of volunteers to 35 by 2021.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Equality officer: This appears to be the best solution to the identified need (suggested score 2 points). Grants officer: The organisation has provided evidence to support the need for their services in South Oxfordshire.	Score	2/2

How well do other agencies / council staff support the service this organisation provides?			
Equality officer: I support this service (suggested score 2 points).		Score	2/2
Grants officer: The organisation has provided a list of agencies that they work with and a reference from Oxfordshire County Council.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets show considerable growth over the four year period which is in line with the financial growth forecast but may prove to be over-stretching for the organisation.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
The delivery plan provided by the organisation sets out the core activities to be provided to young carers on a quarterly basis year by year in line with the targets and financial information provided but may be over ambitious.		Score	1/2
What is the funding for?			
The funding will enable the organisation to continue its current service to a higher number of beneficiaries.		Score	1/2
Total score	18/26	Recommended Grant	£83,509

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

South & Vale Carers has been supporting Young Carers (YCs) for over 20 years throughout South Oxfordshire where we currently offer a unique service to over 150 YCs annually. YCs are children/young people whose time is predominantly spent helping to look after a relative with a disability/illness/mental health condition or substance abuse problem.

With an estimated 2,000 YCs in South Oxfordshire (6-10% of the children and young people under 25) and given the gap in provision for YCs in the County, demand for our service in the District is high (>50 new referrals/year) and, in the words of South Oxfordshire YCs, “a real lifeline, without which YCs would find it very hard to cope”.

Each YC we work with has a unique experience of their role, and not all impacts are negative; however, caring can cost YCs dearly if not given the support they need. Echoing national and local research (Hidden from view-Children Society, 2013; OCC Draft Carers Strategy, 2016) Oxfordshire Community Foundation’s latest report (Oxfordshire Uncovered, 2016) offers an insightful account of the many challenges YCs face in Oxfordshire, showing that caring can (and often does) have a detrimental effect on YCs lives; impacting on their health, well-being, educational attainment, social inclusion and life prospects. Mirroring our own monitoring, the report shows that ¾ of YCs in Oxfordshire experience important physical/emotional strain, profound isolation and loneliness often leading to depression and stress with a great many finding themselves at greater risk of becoming vulnerable young adults, prone to deprivation and exploitation.

OCF is careful/right to highlight that, when available, YCs value and hugely benefit from support; and that, given the desperate lack in provision for YCs in Oxfordshire, there is a need to maintain and build on such work to ensure YCs can access the support they need to achieve a more healthy/active life.

Through regular meetings/consultations/feedback, YCs in South Oxfordshire regularly tell us that demands of their caring role considerably restrict their free time and opportunity to enjoy social contacts and activities outside home/school, making them feel isolated, marginalised, different and unhappy. They all tell us that what they need most is having time away from their caring role to “recharge”, opportunities to engage in a range of social activities, where they can build supportive friendships with others in the same situation; which is why they value and benefit so much from the service we offer them.

In our most recent consultation (July 2016), South Oxfordshire YCs told us that as well as free trips and social activities, they would value:

- support in accessing local leisure provision either independently with friends and/or family (e.g. Leisure Centre); something we feel we can help them with through the involvement of community volunteers;
- support in building practical skills to maintain health/well-being whilst caring – many find it hard to cope physically and emotionally with their practical caring responsibilities and we want to help them with this through offering adapted training and support to help them build greater resilience.

Why is your service is the best solution to meet this need?

Our service builds on 20 years’ experience working locally with Young Carers (YCs) and their families in South Oxfordshire, offering them support they tell us they want/need most:

- Independent, specialist and confidential support – delivered by staff/volunteers who understand YCs needs; are sensitive to the stress they’re under and non-judgemental about the issues they face; key when engaging with hard-to-reach groups;
- Responsive support – gives YCs a greater chance of accessing support

	<p>promptly (minimising waiting time) and regularly;</p> <ul style="list-style-type: none"> - Free support – enables YCs to access the support they need which otherwise would be financially impossible for them. - Respite – offers unique opportunities (locally/countywide) for YCs to step away from their stressful role, have the space/time to be youngsters and enjoy activities vital to their health/wellbeing. - Peer support/sense of belonging - provides YCs with a rare chance to meet other YCs in similar situations and develop vital supportive friendships; - Community support – gives local volunteers/leisure providers a central role in helping YCs take part / feel included in community life; - Practical help – offers YCs training that recognises their individual circumstances helping build skills they need to support the person they care for.
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<ul style="list-style-type: none"> • Young Carers (YCs) aged 8 to 25 and their families • Local communities <p>Across SODC we estimate we will work with in:</p> <p>Year 1, 50 new YCs and their families in addition to the 150 YCs we currently support in SODC and involve at least 5 volunteers</p> <p>Year 2 a further 60 new YCs and their families and recruit 10 volunteers</p> <p>Year 3 a further 75 new YCs and their families and recruit another 10 volunteers</p> <p>Year 4 a further 90 new YCs and their families and recruit another 10 volunteers.</p> <p>275 new YCs supported and 35 volunteers involved over the four years of this grant application. A total of 425 YCs and their families will receive vital support and training.</p> <p>The impact of our work on YCs will be assessed using:</p> <ul style="list-style-type: none"> • Nationally recognised assessment tools (MACA and PANOC) which scope the caring role of each YC and the impact of the caring role on their well-being; • Feedback forms, giving YCs and their families a direct role in assessing the value of our service in supporting their needs and influencing future service development; • Feedback from our other young carers partner stakeholders.

Applicant's Financial Forecast - South & Vale Carers Centre

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£66,846	£12,143	£16,257	£36,009	£52,237
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	£105,526	£129,343	£271,880	£272,000	£272,000
	Training and development	£2,229	£2,229	£2,185	£2,142	£2,100
	Expenses	£5,837	£5,837	£5,722	£5,610	£5,500
	Agency fees and other related employment costs	0	£0	£0	£0	£0
	Mobile Phones	1620	1620	3240	3240	3240
Building costs	Rent/mortgage	£15,703	£15,703	£22,691	£24,691	£26,691
	Business rates	£0	£0	£0	£0	£0
	Gas	£0	£0	£0	£0	£0
	Water	£0	£0	£0	£0	£0
	Electricity	£0	£0	£0	£0	£0
Services	Total					
	Wi-Fi/broadband	£648	£648	£800	£800	£800
	Phone Line	£139	£139	£250	£250	£250
	Building maintenance	£0	£0	£0	£0	£0
	Cleaning	£306	£306	£600	£600	£600
Supplies, equipment and consumables	Stationery and postage	£2,800	£2,800	£4,000	£3,000	£3,000
	ICT development	£0	£0	£2,500	£1,500	£0
	Meetings costs	£120	£120	£400	£400	£400
	Publicity and marketing	£7,046	£7,046	£12,000	£8,000	£8,000
	Furniture, equipment and maintenance	£1,500	£0	£2,000	£0	£0
Professional costs	Building Insurance	£0	£0	£0	£0	£0
	Trustee Insurance	£556	£667	£800	£960	£1,152
	Public/Employee Liability & Personal Accident	£556	£667	£800	£960	£1,152
	Professional fees (accountants, legal, HR etc)	£3,078	£3,078	£3,078	£3,078	£3,078
Other costs	Software licences	£1,333	£1,333	£1,600	£1,600	£1,600
	Governance	£3,325	£3,360	£3,867	£4,000	£4,000
	Fundraising	£570	£1,200	£2,000	£2,000	£3,000
	Young Carer Activities	£15,000	£24,000	£50,000	£60,000	£75,000
Total Expenditure (B)		£167,891	£200,096	£390,414	£394,832	£411,564
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£130	£130	£130	£130	£130
	Earned income (charity shops, fees for training)	£0	£0	£0	£0	£0
	Contracted services from local authorities etc	£0	£0	£200,000	£200,000	£200,000
Donations, grants and fundraising	Grants from local councils, agencies, government bodies	£46,000	£21,000	£21,000	£21,000	£21,000
	Grants from philanthropic foundations/organisations	£57,600	£178,150	£182,105	£183,000	£183,000
	Fundraising income from community / events	£1,765	£2,000	£3,000	£3,000	£3,000
	Other donations	£7,267	£2,500	£3,500	£3,500	£3,500
Other income	Income from interest on reserves, endowment funds etc	£26	£30	£30	£30	£30
	Bournemouth Young Carers Trip	£400	£400	£400	£400	£400
Total Income (C)		£113,188	£204,210	£410,165	£411,060	£411,060
Balances at year end (i.e. line A - line B + line C)		£12,143	£16,257	£36,009	£52,237	£51,733

Applicant's project delivery/development plan - South & Vale Carers Centre

Young Carers Well-being Project Delivery Plan:

Core Activity 1 – Trips Out and Activities: Our project will offer opportunities for young carers aged 8 to 24 to go on free trips to access activities and experiences they would not access otherwise, giving them a chance to take a break from their caring role, get involved in activities they enjoy, have fun and relax which is vital to their physical and mental wellbeing.

Care Activity 2 – Befriending Scheme (New Service): our project will offer Young Carers aged 8 to 24 the opportunity to be matched with a local community volunteer to either take a break from caring role and be supported to go out with family to access local leisure provision.

Core Activity 3 – Young Carer Skills Training (Rolling out a tested pilot scheme): Our project will offer young carers aged 8 to 24 training opportunities in a range of skills to improve their competencies they need to undertake their caring roles. In this way our training will help sustain them in their caring roles, increase their confidence and reduce the stress and anxiety many feel.

Working Collaboratively: Each of these core activities will strongly depend on working collaboratively with other organisations most particularly local activity providers eg: all Better local leisure centres, Henley Rowing Club and The Earth Trust to deliver better outcomes for YCS and their families locally.

Quarter	Activity
2017/18	
1	Establish project board Core Activity 1: <ul style="list-style-type: none"> • Finalise 2017/18 trips and activities programme • Deliver 2 trips/activities Core Activity 2: <ul style="list-style-type: none"> • Recruit Volunteer Co-ordinator • Recruit 5 volunteers • Train volunteers • Work with activity providers locally to develop a specific discount scheme for young carers and their families Core Activity 3: <ul style="list-style-type: none"> • Finalise Young Carer Training programme for 2017/18 • Deliver 1 training event Quarterly monitoring and evaluation: <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
2	Core Activity 1: <ul style="list-style-type: none"> • Deliver 4 trips/activities including August family trip to Bournemouth Core Activity 2: <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs • Work with leisure providers locally to develop a specific discount scheme for young carers and their families Core Activity 3: <ul style="list-style-type: none"> • Deliver 3 training event

	<p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
3	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 3 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs • Work with leisure providers locally to develop a specific discount scheme for young carers and their families <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training events <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
4	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 2 training events <p>End of year evaluation and report:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting • Collate all information into end of year report and produce annual report for SODC and S&V Young Carers Trustees, Plan and Finalise Young Carer Trips and Training programme for 2018/19

2018/19	
1	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • 1 training events for young carers <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
2	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities including August family trip to Bournemouth; <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training event <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
3	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training events <p>Quarterly monitoring and evaluation:</p>

	<ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
4	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 2 training events <p>End of year evaluation and report:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting • Collate all information into end of year report and produce annual report for SODC and S&V Young Carers Trustees Plan and Finalise Young Carer Trips and Training programme for 2019/20
2019/20	
1	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • 1 training events for young carers <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
2	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities including August family trip to Bournemouth <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training event <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
3	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training events <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
4	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 2 training events <p>End of year evaluation and report:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting • Collate all information into end of year report and produce annual report for SODC and S&V Young Carers Trustees Plan and Finalise Young Carer Trips and Training programme for 2020/21

2020/21	
1	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • 1 training events for young carers <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
2	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities including August family trip to Bournemouth <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit and train volunteers + match with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training event <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
3	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 4 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit, train and match 10 volunteers <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 3 training events <p>Quarterly monitoring and evaluation:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting.
4	<p>Core Activity 1:</p> <ul style="list-style-type: none"> • Deliver 2 trips/activities <p>Core Activity 2:</p> <ul style="list-style-type: none"> • Recruit, train and match 10 volunteers with YCs <p>Core Activity 3:</p> <ul style="list-style-type: none"> • Deliver 2 training events <p>End of grant evaluation and report:</p> <ul style="list-style-type: none"> • Collate data into quarterly report and review progress during quarterly project board meetings in readiness of South and Vale Carers performance management reporting • Collate all information into end of year report and produce annual report for SODC and S & V Young Carers Trustees

Berinsfield Information and Volunteer Centre	Ref	SRev\46	
Information and advice in a range of areas including welfare rights, housing, social support, and consumer rights. Volunteer bank and training facility.			
Total cost (over four years)	£147,275	Amount requested (over four years)	£60,900
Previous grants: Revenue grant 2013/14 – 2016/17 £97,636 (average £24,409/year) Revenue (one off) 2008 £1,000 celebration day grant Capital grant – 2014/15 £10,400 centre rejuvenation Revenue Grants 2006/7 – 2012/13 £50,442 (average £7,206/year)			
District ward areas covered: Chalgrove, Berinsfield, Sandford & The Wittenhams, Didcot North East, Cholsey, Benson & Crowmarsh, Wallingford, Thame			

Scoring

Does the grant reduce each year?		
The grant is more than the 33 per cent threshold, requesting 50 per cent in years one and two it then reduces to under 33 per cent in years three and four.	Score	1/2
Long term financial plan		
The organisation has provided a detailed financial plan, but as its services are free is reliant on grants and donations giving a level of risk and uncertainty to its financial plans. This is reflected in the request for 50 per cent of funding in 2017-18 and 2018-19 which gives some doubt to the ability to operate without the council's continued high level of financial support.	Score	1/2
Do they have at least one year's running costs in reserve?		
The organisation had £11,166 in reserve at 1 April 2016. The organisations reserves policy states that they should have a minimum of six months expenditure in reserve (£16,170).	Score	0/2
Have they covered their costs for the last two years?		
The organisation has made small surpluses in 2015 (£1,177) and 2016 (£5,223).	Score	2/2
What are their other funding sources?		
The organisation has identified some other sources of funding and has secured £5,250 for 2017-18.	Score	1/2
Evidence of local need		
Community Infrastructure Support Officer: Statistically, Berinsfield is an area of deprivation, with a high-density population and comparatively lower levels of owner occupied homes and higher levels of social housing than the rest of South Oxfordshire. The service is utilised well and is going to be under further pressure locally due to benefit cuts (suggested score 2 points).	Score	2/2
Working with our corporate priorities		
Community Infrastructure Support Officer: The service meets the priority of building thriving communities (suggested score 2 points). Grants officer: This service contributes to our sustainable communities and building thriving communities priorities as well as to our equality objective to help deliver better outcomes for disadvantaged groups and encourage community cohesion. However, the contribution is specific to the Berinsfield area.	Score	1/2 (counts as 2 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
They provided their volunteer policy and evidence of a number of volunteers working for the organisation.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		

Community Infrastructure Support Officer: BIVC could improve by further engagement with other services in the village, to ensure there is no cross-over and to enable efficient delivery of their own services and potential cost savings to be achieved.		Score	1/2
Grants officer: The organisation is well known in the locality and local residents have confidence in the services provided.			
How well do other agencies / council staff support the service this organisation provides?			
Community Infrastructure Support Officer: I strongly support the continuation and potential expansion of this service (suggested score 2 points).		Score	2/2
Grants officer: The organisation is supported by Berinsfield parish council and other local organisations such as the health centre, children's centre, and the community association.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets provided are reasonable and show growth in each of the four years.		Score	1/2
How achievable/reasonable is their project delivery/development plan?			
The project plans provided are reasonable but the over-riding financial situation will deem whether they are achievable.		Score	1/2
What is the funding for?			
The funding will enable the organisation to continue and grow its existing service.		Score	1/2
Total score	17/26	Recommended Grant	£56,815

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

SODC core strategy states Berinsfield is one of the least affluent communities in the South Oxfordshire area, with 15.1% of the working population receiving DWP benefits and 25.6% of households receiving housing and council tax support. Berinsfield has a higher than average number of children in out of work families. According to the 2011 census a third of the population have no qualifications and poor literacy skills. There is an increase in the ageing population and our services will consequently be crucial. We have found an increase in older clients who are finding themselves in debt, not coping and isolated.

Over the last 40 years we have used a number of different ways of ascertaining the level of need in our community, we have used in house statistic collecting which we consulted with our funders to decide which areas were needed. We have used OCVA consultants and are at present in consultation with a member of Collaborent.

We consult with various organisation on the village to help improve our services. These organisations, besides helping us to improve our services, signpost client that need help, these include BCB, SOHA, Police, Health Centre, Children's Centre, MLC Lunch Club, Wallingford Food Bank, EAG, Church, and we receive from the Parish Council a hardship fund to be used in emergencies.

Through our own statistics and networking during village functions, we have had to increase our opening hours to cope with the influx of clients, however there is still room to expand this or maybe go into local businesses and offer our services for a few hours a week.

We collect data from our client satisfaction survey sheets to ensure high level of service to our clients. When BIVC and the Children Centre seemed threatened residents took it upon themselves to organise a petition to retain our services, with over 300 signatures in a few days.

While we do everything we can to collect information we are restricted by our strict confidentiality policy.

Why is your service is the best solution to meet this need?

We are the only service In the locality to offer such a range of services, our clients cover a large area not just Berinsfield Village but the surrounding villages. Due to the lack of transport many of our clients find it impossible to access other services and hospital. Due to the ever changing benefits system and financial situation at the moment we are inundated with serious debt issues covering personal debt, benefit debt and council tax and we are the only service offering debt advice in the area. We work with other organisations in the village for the benefit of the community.

Berinsfield in undergoing a major regeneration scheme which will increase the village size and we anticipate that this will increase our work load considerably.

Over the years we have built up a rapport with the older generation and clients with poor literacy skills who feel confident to confide their problems in our service.

We have a volunteer training scheme which enables volunteers to improve their skills in literacy, communications, IT and giving them confidence to enter the work market.

<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>All people from the village and surrounding areas benefit from our services. These include the older people who are particularly vulnerable and isolated, single parents and unemployed who need help to negotiate the benefit system, help with debt, advocacy and support. Clients with long and short term mental health issues, which can involve long term support.</p> <p>Due to the isolation of the village our communal activities provide a means of inclusion for lonely, disabled and isolated people. The village voice is a means of communicating village activities and encourages local businesses to advertise locally.</p> <p>Over the years we have had numerous volunteers who have benefited from the training they have received, enabling many of them to return to work. These include GCSE's in Maths, English, Psychology, Basic Counselling, Welfare rights, Debt, Communications, IT, we assess the needs of each individual volunteer and tailor the training for their benefit.</p> <p>The other organisations within the village also benefit from being able to access our services.</p>
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Applicant's financial forecast - Berinsfield Information and Volunteer Centre

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this figure)		£11,166	£11,016	£8,721	£6,908	£5,815
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	24000	£22,000	£22,000	£22,000	£22,500
	Training and development (all staff and volunteers)	£1,700	£1,700	£1,500	£1,500	£1,500
	Expenses	200	£200	£100	£110	£120
	Agency fees and other related employment costs	900	£900	£910	£920	£930
	Pension		500	500	520	530
Building costs	Rent/mortgage	£3,250	£3,250	£3,300	£3,300	£3,400
	Business rates					
	Gas					
	Water	£120	£130	£140	£150	£160
	Electricity	£1,000	£1,150	£1,250	£1,300	£1,400
Services	Wi-Fi/broadband					
	Phone Line	£1,000	£1,200	£1,200	£1,250	£1,300
	Building maintenance	£200	£200	£150	£150	£150
	Cleaning	£100	£75	£75	£75	£75
Supplies, equipment and consumables	Stationery and postage	£400	£420	£440	£460	£460
	ICT development	£300	£310	£320	£340	£360
	Meetings costs (conference rooms, catering etc etc)	£300	£250	£225	£225	£200
	Publicity and marketing (design, print and photocopying)	£800	£750	£650	£650	£650
	Furniture, equipment and maintenance	£1,200	£1,200	£1,200	£1,000	£1,000
Professional costs	Building Insurance					
	Trustee Insurance	£225	£230	£235	£240	£250
	Public/Employee Liability & Personal Accident	£347	£360	£370	£380	£390
	Professional fees (accountants, legal, HR etc	£500	£500	£550	£550	£550
	Advice Uk/OCVA	£368	£380	£390	£395	£400
Other costs	General Expendis/Fundraising costs	£400	£350	£250	£250	£250
	Transport & Volunteering expensis	£500	£500	£500	£500	£525
	Misc	£300	£300	£300	£250	£250
Total Expenditure (B)		£38,110	£36,855	£36,555	£36,515	£37,350
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc)	£700	£750	£780	£810	£850
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£25,000	£12,300	£12,200	£12,100	£12,001
	Grants from philanthropic foundations/organisations	£7,750	£15,750	£16,000	£16,500	£16,500
	Fundraising income from community / events	£4,000	£5,000	£5,000	£5,200	£5,200
	Other donations	£500	£750	£750	£800	£850
Other income	Income from interest on reserves, endowment funds	£10	£10	£12	£12	£14
Total Income (C)		£37,960	£34,560	£34,742	£35,422	£35,415
Balances at year end (i.e. line A - line B + line C)		£11,016	£8,721	£6,908	£5,815	£3,880

Applicant's project delivery/development plan - Berinsfield Information and Volunteer Centre

Partnership and Collaboration plan

Berinsfield Information and Volunteer Centre (BIVC) has a number of significant and strong relationships, but aims to review and progress these, as well as explore and open up new opportunities. These collaborations and potential initiatives provide the opportunity for BIVC to reduce costs and generate new forms of income, as well as enhance the service it provides.

As the aim of the organisation is to provide support for its beneficiaries, and limited resources are available, focus will need to be on the opportunities that could be the most beneficial. This development plan also sets out a number of complementary approaches, some of which overlap, but this will provide more opportunities to establish synergies and mutually beneficial opportunities from emerging local themes and other organisations. Stuart Ely, a trustee of BIVC, who is also a local councilor and businessman will maintain a watching brief over this plan.

Emerging programmes and initiatives

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
Berinsfield regeneration programme	BIVC is already engage in this significant programme and as it evolves, will work with key stakeholders and other interested parties to open up new opportunities	2	Caroline	January 2017	April 2017
SODC & VoWH Volunteering support	Through this initiative, BIVC will work with SODC and other groups to find ways of utilising volunteering to strengthen BIVC. Opportunities for new volunteering roles will be explored, which could include someone to help resource and deliver this plan. Champions or Ambassadors for BIVC could also be a possibility, New forms of support and resource that may arise from the programme could also be valuable.	2	Pam	March 2017	July 2017
Workplace Wellbeing	As employers are finding it difficult to find and retain staff, there is an increasing requirement for them to demonstrate ways in which they support staff and their families. The work of BIVC is aligned with a number of themes that are of interest and value to employers, so BIVC will seek to use these to open up ways to connect to local employers	3	Stuart Ely	March 2017	July 2017
Community transport Hospitals - JR etc Comet bus Taxi	BIVC is involved with local transport issues in a number of ways including the need for local people to attend hospital appointments in Oxford, and the reduction in public transport services. BIVC will continue to develop ways in which it can collaborate with others engaged in this topic	1	Caroline	December/ January	Monthly
Premises/workspace	BIVC is currently based in a property leased by Oxfordshire County Council. Whilst the future is uncertain, opportunities around sharing of premises, whether the existing property or new, shared property is and will continue to be explored. Discussions are already taking place with Berinsfield Community Business.	1	Stuart Ely	January 2017	July 2017

Other themes and opportunities	Examples are Debt advice, Housing benefits, support with medical queries, mail, literacy, outreach work, food bank vouchers, pensionable age, young mums and young people	2	Caroline	March 2017	May 2017
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Networks

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
Oxfordshire Workplace wellbeing Network	This relatively new network has been identified as a place through which BIVC can engage with local employers on topics that staff could need support. These connections could also lead to other opportunities	2	Caroline	January 2017	March 2017
ROBIN network	The ROBIN network enables voluntary sector organisations to seek support from businesses and others. It has already found a contact who might be able to considerably reduce some of the professional fees paid by BIVC, and will continue to engage and explore other similar opportunities.	1	Caroline	December 2016/January 2017	Monthly
Help On Tap	Help On Tap is an online forum where voluntary sector organisations support each other, providing help, advice and links to new funding opportunities. BIVC will access and utilised this relative new and growing resource	1	Pam	January 2017	July 2017
Wider connections	BIVC also has valuable connections outside the immediate local area. An example of this is St. Michaels Church in Oxford, which has been a strong supporter financially and in other ways. New opportunities will also be explored through these links to seek and open up new opportunities	1	Caroline	January 2017	Ongoing
Local Business Networks	BIVC will use existing and new business contacts to seek and consider engaging with local business networks	3	Stuart Ely	March 2017	July 2017

Local organisations and agencies

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
Berinsfield Health Centre - GP surgery Local dentist	BIVC has a very strong relationship with the local GP surgery and the dentist. Clients often need advice from BIVC either before or following appointments. As well as helping clients, this already provides mutual benefits for the surgery and BIVC. This relationship will be developed and strengthened with a view to seeking more ways to collaborate	1	Caroline	December 2016	Monthly
Employment Action Group	There are parallels in the way BIVC and EAG works. There is a relationship, but this could be stronger and we will develop this and look for new opportunities through it.	3	Caroline	December 2016	Monthly
Age UK	The relationship with Age UK has recently been strengthened following a recent SODC Revenue Grants workshop. This will help BIVC continue to develop this link	2	Caroline	December/January	February/ March 2017
Other advice centres	Following the TAPIN project, new connections were developed, one of which led to BIVC taking on a new and efficient software system recommended by a partner advice organisation. These valuable links will continue to be grown	3	Sue	March/April 2017	July 2017
Housing Associations, including Soha Housing	BIVC has a good relationship with Soha, but a number of initiatives opens up the chance for it to work more closely, so this will continue to be developed.	1	Caroline	December 2016	Ongoing

Various	BIVC was successful in receiving funding for a high specification photocopier. Opportunities will be explored to enable others to access this and generate income	3	Caroline	February March 2017	July/August 2017
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Local Businesses and other employers

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
Various local employers such as BMW, Williams, Culham etc.	Opportunities will continue to be explored with local businesses and other major employers with links to the local area. These will range from opportunities to support their employees who live in Berinsfield and the surrounding areas through to the potential for new commercial, income generating opportunities.	2	Caroline	March 2017	July/August 2017
Knowles	A local builder with existing links and dialogue to be developed into specific areas of mutual benefit	1	Caroline	January 2017	Ongoing
Berinsfield Community Business	Another local business in the form of a Social Enterprise, with opportunities to work more closely together and collaborate in terms of resources	2	Caroline	December 2016	Ongoing
Other very local businesses	Although BIVC will be seeking ways of working with a range of employers based within its catchment area, or known to employ people from Berinsfield and the immediate surrounding area, BIVC will continue to be especially focused on businesses in the immediate area.	3	Caroline	April/May 2017	July/August 2017

Joint funding opportunities

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
To be explored, but including Oxfordshire Community Grants programme	Following the benefits derived and relationships developed from the recent TAPIN Advice programme, other joint opportunities will be sought and considered with a view to attract funding, but also open up new partnerships and collaborations	3	Pam/ Sue	April 2017	July 2017

Press, PR, media and local VIP's

Organisation/Contact	Existing or possible collaboration	Priority 1-5	Who	When	Update
Press and media	BIVC will use current and emerging topics it is involved with to raise its own profile and opportunities for others to engage and add support	3	Caroline	December	Ongoing
Local MP & councillors	BIVC is fortunate to have support from a number of local councillors, and will continue to use and develop these relationships to help strengthen the service and make new connections	2	Caroline	December	Ongoing
Local Awards programmes Charity Awards	Consideration will be given to opportunities for self promotion through local initiatives such as the Charity and Community Awards	4	Pam/ Sue	April/ May 2017	July 2017
Village Voice publication	The Village Voice publication produced by BIVC is very popular and also provides opportunities to develop more connections and open up new areas of interest	4	Sue	March 2017	July 2017

Project Delivery 2017/2018 We will be in constant communication with the village via drop ins, Facebook and the Village Voice to encourage better community relations.

Month	FUNDRAISING/ COMMUNITY EVENTS	MEETINGS	MANAGEMENT ISSUES	TRAINING	GRANTS	MISC
April	Contact local businesses/shops for donations towards fete raffle. Look for fundraising and create a timeline. Coffee Morning. Christmas Club. 49 Club. Easter fundraiser.	Fete meeting. Centre debriefing.	Centre Management. Weekly Management Meetings. Volunteer recruiting	Training schedule for the year. Contact Barton. In house Debt advice.	Parish Council grant. BCB grant. Other grants.	Monthly Accounts. Village Voice.
May	Advertise fete. Fundraising event @ Dorchester tea rooms. Coffee Morning. Christmas Club. 49 Club.	GNS volunteer meeting. School meeting	Centre Management. Weekly Management Meetings.	In house training- Computers, client issues.	Create funding timeline.	Contact all agencies for Village Voice articles. Monthly Accounts.
June	Coffee Morning. Christmas Club. 49 Club. Organise McMillian Coffee morning.	Centre debriefing. Fete meeting.	Organise volunteers for fete. Centre Management. Weekly Management Meetings.	Welfare rights training.	Identify relevant funders. Start to apply	Monthly Accounts. Village Voice.
July	Coffee Morning. Christmas Club. 49 Club. Village fete	Trustees Meeting.	Centre Management. Weekly Management Meetings.	In house training – Confidentiality, H&S		Village Voice. Monthly Accounts. Contact all agencies for Village Voice articles.
August	Book fair rides etc for 2018 fete. Coffee Morning. Christmas Club. 49 Club.	Centre debriefing. Meeting with Doctors	Centre Management. Weekly Management Meetings.		Continue with funding.	Clean down centre ready for shutdown. Monthly Accounts. Village Voice.
September	McMillian Coffee Morning. Start gathering donations for Xmas Bingo.	Meeting with School. Meeting with EAG.	Stat reports. Manager report. Centre Management. Weekly Management Meetings. Volunteer recruiting	CAB for training. In-house Debt Advice		Monthly Accounts. Contact all agencies for Village Voice articles.
October	Coffee Morning. Christmas Club. 49 Club. Start organising community lunch.	AGM. GNS volunteer meeting.	Centre Management. Organise volunteers for community lunch. Advertise for volunteers and	Welfare rights. Outreach training.	Grant applications	Monthly Accounts. Village Voice.

	Organise Christmas Bingo.		drivers. Weekly Management Meetings.			
November	Coffee Morning. Pay out Christmas club. 49 Club.	Centre debriefing. Trustees meeting	Visit surrounding villages with posters and leaflets. Organise volunteers for community lunch. Weekly Management Meetings.	In house, protocols	Outcomes of grants	Send out invitations for community lunch. Monthly Accounts. Contact all agencies for Village Voice articles.
December	Christmas Coffee Morning. Christmas bingo. Community lunch	Meeting with children centre. Meeting with EAG.	Centre Management. Visit local councils with our posters and leaflets. Christmas shutdown. Weekly Management Meetings.			Advertise Christmas club. Office clean down. File/shred old paperwork Monthly Accounts. Village Voice.
January	Start Christmas club. Book all coffee mornings and community lunch for the year with the church.	Centre debriefing. Meeting with school. Meeting with doctors. Fete meeting	Staff Appraisals'. Centre Management. Advertise for volunteers/drivers. Contact all local businesses/groups regarding fete. Weekly Management Meetings. Volunteer recruiting	Contact CAB for their training schedule.	Look at grant applications	Removal of all Christmas decorations/second hand goods. Monthly Accounts. Contact all agencies for Village Voice articles.
February	Coffee Morning. Christmas Club. 49 Club.	GNS volunteer meeting.	Visit doctors, dentist to advertise centre and leave leaflets. Centre Management. Weekly Management Meetings.	In house STAT's		Village voice. Monthly Accounts.
March	Coffee Morning. Christmas Club. 49 Club. Easter fundraiser.	Trustees meeting. Centre debriefing.	Statistics Organise a main fundraiser. Centre Management. Weekly Management Meetings.	Look at CPAG for training.	Grant applications	Contact all agencies for Village Voice articles. Monthly Accounts.

Train	Ref	SRev\76
Youth work on Didcot's streets.		
Total cost (over four years)	£390,429	Amount requested (over four years)
		£85,000
Previous grants: Revenue grant 2013/14 – 2016/17 £87,249 (average £21,812/year) Revenue grant 2010/11 – 2012/13 £60,000 (£20,000/year)		
District ward areas covered: Didcot West, Didcot South, Didcot North East		

Scoring

Does the grant reduce each year?		
The grant remains the same in years 1 and 2, drops significantly in year 3 then minimally in year 4.	Score	1/2
Long term financial plan		
They have only secured £5,000 of their other funding for the four years (including next year) so far.	Score	1/2
Do they have at least one year's running costs in reserve?		
They don't have sufficient funds to cover a year's running costs. They do meet their reserve policy to hold between three and five months in reserve.	Score	1/2
Have they covered their costs for the last two years?		
They made a loss in 2015 but a surplus in 2014.	Score	1/2
What are their other funding sources?		
They have £5,000 secured over a five-year period, but this is their only secured funding. They have included a list of some organisations they intend approaching for the rest of the funding.	Score	1/2
Evidence of local need		
Community Safety Team Leader: There is strong evidence of local need for detached work and mentoring in Didcot (suggested score 2 points). Grants officer: While they received donations from some external organisations which implies support for their work (including from the Community Safety Partnership) their actual evidence of need is not strong.	Score	1/2
Working with our corporate priorities		
Community Safety Team Leader: Strong levels of contribution to a number of our priorities (suggested score 2 points). Grants officer: This service contributes to our 'thriving communities' priority, especially the action work with partners as part of the South and Vale Community Safety partnership (CSP) to deliver the CSP's annual plan.	Score	2/2 (counts as 4 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
They already encourage volunteers and plan to expand in this area to help keep running costs down and their volunteering policy seems robust.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Community Safety Team Leader: They are still settling in a new board of trustees, youth workers and ways of working after a difficult 18 months. Previously, I was very confident in their ability to meet the needs in this area and hope they will return to their previous standard (suggested score 1 point).	Score	1/2

Grants Officer: The organisation is still settling after a period of change in 2015/16, so have yet to fully show they can deliver a programme of youth work in Didcot. There are also some other youth programmes working in the area potentially offering alternative options to this organisation. Their evidence of support from other organisations is strong, but does not fully confirm them to be the best/only solution.			
How well do other agencies / council staff support the service this organisation provides?			
Community Safety Team Leader: Historically I was very impressed with their work, and note they have new staff, trustees and ways of working. I hope to see the organisation building stronger relationships to exceed their previous successes (suggested score 1 point).		Score	1/2
Grant Officer: The references and other evidence of support for their work in previous years is strong but they are still re-establishing themselves after the organisational overhaul last year.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
They hope to engage with 1,260 young people (with a number of targets relating to outcomes from this engagement) over the four year period which seems reasonable.		Score	1/2
Their operational targets focus on increasing volunteers (which is positive) increasing their salaried staff and obtaining some kind of quality accreditation. They haven't given any targets around collaborating with other organisations, lowering running costs or generating sustainable income.			
How achievable/reasonable is their project delivery/development plan?			
Their delivery and development plan didn't give enough information about the actions they will deliver for young people, what their ongoing development plans are or when any actions would be delivered.		Score	0/2
What is the funding for?			
To continue to deliver youth work to young people in Didcot, initially at levels previously maintained, but increasing later in the grant period.		Score	1/2
Total score	16/26	Recommended Grant	£79,298

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>TRAIN has identified precise needs in targeted area by working in Didcot for 14 years. We recently reviewed various stakeholders and active participants in our community and identified which bodies we should be collaborating with directly. As a result we are working across multi agencies sharing knowledge, best practices and combining capabilities to avoid duplication.</p> <p>We have built up solid, extensive links with other community organisations and statutory bodies.</p> <p>TRAIN's lead youth worker Alice Dore joined the charity with an impressive network of sector contacts, and her ability to build trusting professional partnerships has enabled the charity to connect with a greater range of youth work providers within our region and beyond, national advisory bodies, new youth initiatives and volunteering community.</p> <p>When she was appointed earlier this year her first task was to execute a scoping programme, ascertaining needs of the town's young people, partnering with key stakeholders, and listening to the concerns and hopes of the wider local community. The findings from this scoping work were used as basis on which to formulate TRAIN's current provision.</p>

	<p>We have developed close working links with academics and practitioner-bodies that are looking to embed research-informed practices within the sector. TRAIN has new links with research centres based at UCL Institute of Education and benefiting from direct access to latest empirical research and practitioner guidance.</p> <p>TRAIN now has close working relations with following organisations, some of whom (marked *) sponsor the charity's work financially:</p> <ul style="list-style-type: none"> • Early Interventions Hub • DGS • SBS • UTC Oxfordshire • TVP • CTDD (Churches Together in Didcot and District)* • Laing Family Trusts* • CSP (South and Vale CSP)* • Rotary Club* • Didcot Railway Station • Orchard Centre • Cornerstone Arts Centre • Oxfordshire Contemporary Music • CSJB (Community of St John Baptist)* • SOFEA <p>Because we are back doing detached youth work we know exactly what the needs of the young people are, We get instant feedback from them which helps us to create strategies and plans to meet changing needs and avert risks. We are using social media to great effect to enable us to maximize our benefits with young people. We have trust with key stakeholders we are able to develop effective 2 way communication channels which helps us to target our combined efforts.</p> <p>The highest profile needs we met this year came from our strategy of working with TVP Inspector Mark Harling. With his Didcot based team and Orchard Management Centre we intercepted the YP related issues that were escalating out of control. By consultation with all parties and working together to identify root cause we were able to understand everybody's needs, openly discuss potential sustainable resolutions and ultimately eradicate the problem.</p> <p>Our volunteers, staff and trustees have an in depth understanding of Didcot's needs, potential and aspirations. We have undertaken YP surveys to identify how our detached Youth Work has been effective and to better understand what activities they may have been engaging in if TRAIN had not provided meaningful alternatives.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Our service has been under the Management of the new Board of Trustees for only 14 months in which time we have had to completely re-mobilise the charity for the benefit of our Young People and our Community. The Board of Trustees have put in an enormous and professional contribution in establishing a firm foundation so that our Young People are never again put at risk of losing the guiding and supporting presence of TRAIN on the streets of Didcot. The recognition of winning the Inspirational Youth Group award at the BACA's this month was a terrific testimony to the important work of TRAIN in our Community. This has been achieved against the odds as it has been done with 1 full time youth worker and a network of volunteers. The compliment for approximately 5 years up to April 2015 had been 2 Youth Workers who were working in a "business as usual" mode. Given that the Board of Trustees had to all learn their Charity Commission legislative requirements, all of the key policies have been re-written, all the volunteers had to be interviewed, assessed and trained to fulfill their</p>

	designated duties it has been a marvellous collective achievement.
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>In terms of the scale of need, the construction of Great Western Park and the GardenTown (relatively high proportion of social housing) has extended the geographic boundary area TRAIN needs to serve and has placed a greater demand on our resources.</p> <p>In addition to having more young people to help, we are now responding to different challenges. TRAIN's scoping work has highlighted heightened challenges that are facing the town's young people. These include:</p> <ul style="list-style-type: none"> • The growing use of and participation in the trade in Class A drugs - some of which have been found recently to be 'dirty' as well as potent. • The reportedly rising rate of teen pregnancy - in contrast to the declining trend nationally • The increasing hold of organized sexual exploitation. <p>These are all alongside the perennial issues of family breakdown, disengagement from education/training, alcohol misuse, risky sex and relationship behaviours, mental health issues, abuse and neglect.</p> <p>Didcot's young people are TRAIN's primary beneficiaries, but the positive effects of TRAIN's interactions and interventions impact on their family, friendship and wider networks, spreading out to the local community as a whole, helping make Didcot a safe, positive, aspirational place in which to live, work and support each other.</p>

Applicant's financial forecast - Train

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this		£48,209	£36,272	£37,927	£44,484	£46,148
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts individually including on-costs)	45197	£64,275	£64,918	£91,837	£92,755
	Training and development (all staff and volunteers)	£1,000	£1,000	£1,200	£1,200	£1,200
	Expenses	1000	£1,800	£1,800	£1,800	£1,800
	Agency fees and other related employment costs	200		£200		
Building costs	Rent/mortgage	£0	£0	£0	£0	£0
	Business rates	£0	£0	£0	£0	£0
	Gas	£0	£0	£0	£0	£0
	Water	£160	£160	£160	£160	£160
	Electricity	£1,860	£1,920	£1,920	£1,920	£1,920
Services	Total					
	Waste collection/disposal	£15	£15	£15	£15	£15
	TV license/packages					
	Wi-Fi/broadband	£480	£480	£480	£480	£480
	Phone Line					
	Building maintenance	£200	£200	£200	£200	£200
	Cleaning					
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping	£50	£50	£50	£50	£50
Supplies, equipment and consumables	Stationery and postage	£500	£500	£600	£600	£600
	ICT development	£1,000	£1,000	£1,200	£1,200	£1,200
	Meetings costs (conference rooms, catering etc etc)	£3,165	£3,445	£3,500	£3,500	£3,500
	Publicity and marketing (design, print and photocopying)	£2,000	£2,000	£2,000	£2,000	£2,000
	Furniture, equipment and maintenance	£1,850	£500	£500	£500	£500
Professional costs	Building Insurance					
	Trustee Insurance					
	Public/Employee Liability & Personal Accident	£800	£850	£900	£900	£900
	Professional fees (accountants, legal, HR etc)		£500			
Other costs	Trips & activities: equipment, materials, tickets	£3,885	£4,025	£4,675	£4,875	£4,875
	Total Expenditure (B)	£63,362	£82,720	£84,318	£111,237	£112,155
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)	£1,800	£1,800	£1,800	£1,800	£2,000
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£14,500	£20,000	£20,000	£25,000	£25,000
	Grants from philanthropic foundations/organisations	£24,400	£30,000	£35,000	£55,000	£60,000
	Fundraising income from community / events	£5,150	£5,500	£6,000	£6,000	£7,500
	Other donations	£1,500	£2,000	£3,000	£5,000	£6,000
	SODC	£4,000	£25,000	£25,000	£20,000	£15,000
Other income	Income from interest on reserves, endowment funds etc	£75	£75	£75	£100	£125
	Total Income (C)	£51,425	£84,375	£90,875	£112,900	£115,625
Balances at year end (i.e. line A - line B + line C)		£36,272	£37,927	£44,484	£46,148	£49,618

Applicant's project delivery/development plan - Train

Q. Project Delivery & Development plans (including how you will work collaboratively with other groups to become more sustainable in the future).

Brian McNamee is our Chairman and he is highly competent in building collaborative working relationships. He is a qualified facilitator in Collaborative Working which is a British & European Standard BS11000 and ISO 11000 respectively. He is a member of the Institution of Collaborative Working. (Upload certificates). He is leading this element for TRAIN.

In our first Board of Trustees Strategy Workshop we identified key organisations that we should collaborate with and at each Strategy Workshop we review this adjust and amend the prioritisation order. As part of the collaborative process it is vital to find the common bonds, complimentary capabilities, values and culture that have the potential to perfectly align. It is also vital to overcome any competitive inclinations towards each other. This can be done by the creation of the "Relationship Management Plan". This defines the common goal which both/all parties agree with which will be complimentary to each other. This is to enable the necessary trust to begin to be built.

The next stage is to state, understand and commit to the individual objectives of each of the organisations so that each can agree to work in a way that helps each other and is complimentary to the achievement of their "combined" goal. The way to accelerate this is through the frequency of structured face to face discussion. It is essential that the leadership of both parties are perfect role models in what they do and say to ensure integrity of approach.

We have already built strong collaborative relationships with the Thames Valley Police, in particular with Neighbourhood Inspector Mark Harling who is accountable for Oxfordshire, Berkshire and Buckinghamshire, The Orchard Management Centre, Early Intervention Hub, SOFEA and Oxfordshire Youth. We are also in the process of defining agreements to commence on a collaborative journey with DGS and St. Birinus and Aquarius and would look to do the same with all potential key sponsors.

One of our new Trustees elect is a Project Manager with Oxfordshire Youth and she will bring an increased disciplined approach to creation, assurance and management of our Project delivery and development plans.

Our other new Trustee elect will bring expertise in Project management, how to create performance dashboards and commercial sustainability through his experience as Operations Manager of Step by Step Partnership.

We are developing a culture of sustainability in all that we do through building expertise in collaborative working, planning and undertaking lessons learned to underpin continuous improvement, taking time out to have strategic workshops and seeking out mutual benefit partnerships to enable financial resilience.

Exert from the 29 page presentation form a staff away day provided:

Time	What	Intention	Who
10.00	Welcome & Introduction		Brian
10.05	Looking Back	Learn lessons to enable continuous improvement	Most of us!
10.35	Looking Forward	Identify goals and objectives and apply learnings	All
11.00	Need for more structured approach to fund raising	Meet our 4 year Financial targets	Luke
12.00	Trustees Structure and Lead roles	Ensure that our structure and Lead roles are designed to achieve	All
12.30	Lunch		
1.10	Creating Synergies	Exploring increased outcomes through collaborative working	All
1.40	Charity Governance	Evolving & aligning with Best Practise	Ian
2.00	Deliverables	Assigning critical action plans	Alice
2.25	Review of the day	Assess effectiveness	All
2.30	Close	Thanks	

Creating Synergies

- Is there an opportunity to provide better support to our YP's?
- Revisit existing collaborative relationships - Who must we work more closely with?
- Who has the greatest reputation in our sphere of work?
- Who should we create WIN/WIN's with?
- Could we "joint venture" on a collaborative bid for new monies/sponsorships?

Creating Synergies INNER CIRCLE - NOW

Must work closely with ...

- | | |
|--|------------------------------|
| ➤ Police | ➤ Early Intervention Hub |
| ➤ SOFEA | ➤ Churches |
| ➤ Oxfordshire Youth | ➤ SODC |
| ➤ Orchard Centre | ➤ Volunteers |
| ➤ Young People 11-18 | ➤ Town Council |
| ➤ Supporters | ➤ Young social group leaders |
| ➤ Secondary Schools which Didcot YP attend | ➤ Social Workers |
| | ➤ Aquarius |
| | ➤ CSP |

Creating Synergies INNER CIRCLE 1 - SOON

Must work closely with ...

- Cornerstone
- Individual school teachers
- Parents

Creating Synergies CIRCLE 2 -Share ideas now ...

Must work closely with ...

- County Council
- Balsam Family Project
- Science Park (Phil!)
- Ed Vaizey
- YOS (Youth Offending Service)
- Nomad
- Didcot Boys Football Club
- East Hagbourne Football Club
- LOL Didcot Baptist Church youth club (Fri)
- Didcot Herald & local mags
- Karen Whiting
- Local Businesses
- Didcot First
- Hill End (Venue for activities)
- Oxfordshire contemporary music
- Former TRAIN YP 18 – 25
- Probation Service
- NHS

Creating Synergies CIRCLE 3 – Interested but we said not yet beneficial to work with....

- Foodbank
- “Mums in Didcot” Facebook group
- Universities & Colleges
- Damascus
- Christian Publishers
- Mentoring in schools
- Rugby club
- Didcot Football Club
- Didcot Sings
- Hagbourne, Milton, Didcot Town & Didcot Casuals FCs
- Key politicians, e.g. Nick Boles (Skills Minister), Nicky Morgan (Education Minister)
- Detached
- House builders
- Mumsnet.co.uk
- Science Vale
- Christine - Bake Off
- PACT (Parents & Children Together)
- Primary Schools
- Cadets Air / Army
- Scouts
- People who see young people as a problem
- Unions
- DWP (Work/Pensions)
- FCs

Advocates idea

Ed Vaizey Patron has agreed to Gift Aid paid fees from public engagements to role model our approach

➤ **Local Celebrities and dignitaries**

- Bob Harris (Steventon)
- Tim Henman(Aston Tirrold)
- Helena Bonham-Carter
- Frank Williams (Grand Prix ex Didcot Factory now Grove, Wantage Factory)
- Ralph Schumacher(Rowstock)
- Henrietta Knight (Cheltenham Gold Cup winning trainer 3 years in a row ex teacher DGS
- Didcot Mayor (1 year tenure)
- Who else has public profile and was raised / lives in Didcot?

Governance

- EGM
 - Formally vote in Laura & Luke at 6th December Trustees meeting
- Constitutional Discussion
 - Ian will describe in workshop notes

Deliverables

Who	Why	What	When
Brian	Secure Core Funding	South & Vale bid Stage 2	
All	Increase capacity of outputs	Expanding the Volunteer Network	
Nicky	Increase visibility and internal efficiencies	Communications Plan	
Luke & Laura	To enable more dynamic management	Grant/sponsor focussed Management KPI framework	
<u>Tbd</u>	Build and develop beneficial relationships	Stakeholder Engagement Plan	
c/f Alice	Will lead this at Dec	Trustees meeting	

RESTORE		Ref	SRev\63
Gardening specialist to provide additional gardening sessions, for their members (with mental health issues) attending their Didcot centre on Fleet Meadow.			
Total cost (over four years)	£762,011	Amount requested (over four years)	£78,276
Previous grants: Revenue grant 2013/14 – 2016/17 £40,000 (£10,000/year)			

District ward areas covered:

All areas

Scoring

Does the grant reduce each year?		
There is a reduction of about ten per cent per year to the grant amount. The percentage of their total cost covered by our grant only reduces by two per cent each year.	Score	2/2
Long term financial plan		
They have provided a four-year financial plan for the whole organisation and Didcot centre.	Score	2/2
The Didcot centre's finances look to essentially break even each year, while the whole organisation is forecast to make small losses each year.		
Do they have at least one year's running costs in reserve?		
No, and their financial report indicates their reserves are not at their own preferred level either.	Score	0/2
Have they covered their costs for the last two years?		
No, they made an overall loss last year, but a surplus the year before.	Score	1/2
What are their other funding sources?		
The majority of their funding for the Didcot centre will come from NHS funding, which is secure for the four years. They will still need to raise additional money through grants and donations each year (£35,000 in year one), none of which is secure and they have not given a list of who they will approach.	Score	1/2
Evidence of local need		
Equality officer: Good external research showing a local need however, what is not clear is if they have surveyed their users to see if they would like gardening more than one day a week (suggested score 1 point).	Score	1/2 (counts as 2 points as weighted scores)
Grants Officer: There is reasonable evidence there is a local need for their overall service in Didcot, but little to show they need to expand their existing gardening programme, which is what this grant would fund. We are not sure if it will allow existing users to attend more sessions or if more people will benefit.		
Working with our corporate priorities		
Equality officer: High levels of contribution to our equality objective to help deliver better outcomes for disadvantaged groups and encourage community cohesion, however as this is for a very specific service it may limit the pool of people who would like to take part (suggested score 1 point).	Score	1/2
Grants officer: This service will offer limited contribution to our thriving communities' priority and one of our equality objectives.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
They have provided their policy and they have over 120 volunteers working across the county. They hope these gardening sessions will encourage their users to volunteer or eventually get work in the district using the skills they learn.	Score	2/2

What evidence is there that their service is the best solution to the need identified?			
Equality officer: There is good evidence that gardening can help people with mental health issues, however there are a number of other organisations that Restore could consider linking up with (suggested score 1 point).		Score	1/2
Grants Officer: They have an established user group in Didcot and already provide a gardening service however, there is little evidence to show additional sessions are required. They could potentially work with other local groups (e.g. Earth Trust) who need/want help with gardening/horticulture work to reduce the cost of delivering gardening sessions.			
How well do other agencies / council staff support the service this organisation provides?			
Equality officer: Strong support for the organisation as a whole, but recognise that this project may only appeal to a limited number of people (suggested score 1 point).		Score	1/2
Grant Officer: There is some general support for the organisation, but not specifically to increase the number of gardening sessions in Didcot.			
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
Their delivery targets are quite low, with 30 people attending the gardening sessions over the four year period (and some are already attending the existing sessions) offering minimal value for money.		Score	0/2
How achievable/reasonable is their project delivery/development plan?			
Their project plan is reasonable to develop the service and seems to be achievable.		Score	1/2
What is the funding for?			
To fund a gardening specialist to increase the number of gardening sessions they offer at their Didcot centre. Officers suggest any grant is given for their overall service in Didcot and is not limited to additional gardening sessions.		Score	1/2
Total score	15/26	Recommended Grant	£0

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

One in four people in the UK will experience a mental health problem each year (www.mind.org.uk). The population of South Oxfordshire is around 137,000 (<https://www.oxford.gov.uk>). If we assume that at least half of these are adults that means in any given year over 17,000 people are likely to suffer from mental ill health.

Priority 6 of Oxfordshire's Joint Health and Wellbeing Policy 2015-19 (attached) says "Adults living with.. severe mental illness.. consistently tell us that they want to be independent and to have choice and control so they are able to live "ordinary lives" as fully participating members of the wider community."

There is nothing new about the idea of gardening as therapy. There are many reports on the physical, mental and social benefits of gardening and growing. Ancient Egyptian court physicians prescribed walks in palace gardens for those who were mentally disturbed. The people-plant connection has been used actively as an accepted treatment for mental illness since the 1790s when Dr Rush found horticulture had a curative effect on the mentally ill (Strauss & Simpson, 1998).

In May this year the King's Fund published a report into the health benefits of gardening, entitled 'Gardens and Health: Implications for Policy and Practice.' This report (attached) says: "The mental health benefits of gardening are broad and diverse. Studies have shown significant reductions in depression and anxiety, improved social functioning and wider effects, including opportunities for vocational development." This view is entirely consistent with our own. It confirms all the evidence that we have seen in our recovery groups. Gardening activities will remain a core part of our therapeutic programme.

The 2007 Mind Report - Ecotherapy: The Green Agenda for Mental Health details lots of evidence in support of an accessible and cost-effective and natural addition to existing treatment options for mental ill health - ecotherapy. Mind commissioned 2 studies from the University of Essex, the results of which are published in the report. These studies confirm that participating in green exercise activities provides substantial benefits for health and wellbeing.

Restore currently has one Garden Facilitator who works between 4 different recovery groups in Oxfordshire. He is currently able to spend just one day a week at our Fleet Meadow site in Didcot even though gardening activities ideally would take place there every day as it is based on a large allotment site. There is a definite need at this particular recovery group in Didcot to have it's own Gardening Facilitator to support the work of the project.

Referrals to our recovery groups have gone up 55% in the last 3 years while funding is more and more challenging to come by. Restore recently underwent a full independent evaluation of our services (attached). Members, staff, volunteers, Trustees and a wide range of external stakeholders were all consulted. In all areas of our recovery and coaching work "extra capacity" was the need most strongly identified. The Garden Facilitator would provide desperately needed extra resource for this busy recovery group.

Why is your service is the best solution to meet this need?

Restore is an Oxfordshire charity that provides expert support in innovative rehabilitation, employment and training support for people with mental health problems. Our aim is to support and enable people with mental health to achieve their maximum potential.

We believe that everyone has talents and abilities, and the capacity to

	<p>make a valuable contribution to the community. We believe that the stigma associated with mental health problems damages the whole community and we work to challenge this discrimination.</p> <p>Restore provides two main types of support. These are recovery groups and coaching. Recovery groups provide people with the opportunity to come together in a group and work on their journey of recovery together. They use practical tasks (such as gardening, woodwork, catering) to make this possible.</p> <p>Restore has 40 years of experience in therapeutic horticulture. Restore started as one allotment for patients at what is now called Littlemore Mental Health Centre. Our Founder Peter Agulnik a psychiatrist knew his patients had skills and abilities that weren't being used and using these skills and learning new ones could be the key to their recovery. Restore now has 5 recovery groups which have gardening as one of the activities on offer every day.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Between May 2015 and April 2016 we worked with 89 people with mental health problems from South Oxfordshire at our Fleet Meadow site in Didcot. 13 started training in this period, 9 started volunteering and 5 started paid work. Collectively members achieved 686 personal recovery goals such as learning a new skill, starting a new activity, overcoming a barrier to employment or recovery. The recovery groups offer a structured setting for people to spend time with others and learn new skills. Here they can access both staff, volunteer and peer support. The groups help people understand that they can progress and develop. Participants can develop new skills in gardening as well as woodwork, arts and crafts and cooking. The Gardening Facilitator would help interested members gain Level 2 qualifications in Agriculture and Horticulture.</p> <p>The local community will also benefit. The community garden and allotments continue to flourish providing a welcoming space to the community of Didcot and surrounding areas. We could make the community garden even more attractive and accessible if successful in this bid. Each year we organise two very successful community events, one in September and one at Christmas which are well attended by the local community.</p>

Applicant's financial forecast - RESTORE

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in			£5,935	£4,981	£2,519	£2,920
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	£1,152,622	£1,175,674	£1,199,188	£1,223,172	£1,247,635
	Training and development (all staff and volunteers)	£26,150	£26,673	£27,206	£27,751	£28,306
	Expenses (inc all volunteer costs, members costs, transport)	£76,900	£78,438	£80,007	£81,607	£83,239
	Agency fees and other related employment costs	£33,100	£33,762	£34,437	£35,126	£35,829
Building costs	Rent/mortgage	£74,000	£75,480	£76,990	£78,529	£80,100
	Business rates	£5,500	£5,610	£5,722	£5,837	£5,953
	Gas	£2,500	£2,550	£2,601	£2,653	£2,706
	Water	£1,000	£1,020	£1,040	£1,061	£1,082
	Electricity	£5,000	£5,100	£5,202	£5,306	£5,412
Services	Total					
	Waste collection/disposal	£7,000	£7,140	£7,283	£7,428	£7,577
	TV license/packages					
	Wi-Fi/broadband					
	Phone Line (inc broadband)	£9,200	£9,384	£9,572	£9,763	£9,958
	Building maintenance					
	Cleaning	£2,500	£2,550	£2,601	£2,653	£2,706
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc	£4,400	£4,488	£4,578	£4,669	£4,763
Window cleaning/land scaping						
Supplies, equipment and consumables	Stationery and postage	£11,000	£11,220	£11,444	£11,673	£11,907
	ICT development	£23,000	£23,460	£23,929	£24,408	£24,896
	Meetings costs	£5,250	£5,355	£5,462	£5,571	£5,683
	Publicity and marketing	£14,500	£14,790	£15,086	£15,388	£15,695
	Furniture, equipment and maintenance	£36,000	£36,720	£37,454	£38,203	£38,968
Professional costs	Building Insurance					
	Trustee Insurance	£800	£816	£832	£849	£866
	Public/Employee Liability & Personal Accident	£14,750	£15,045	£15,346	£15,653	£15,966
	Professional fees (accountants, legal, HR etc)	£9,500	£9,690	£9,884	£10,081	£10,283
Other costs	Depreciation	£55,371	£56,478	£57,608	£58,760	£59,935
	Outsourced mental Health Recovery services	£141,929	£144,768	£147,663	£150,616	£153,629
	Fundraising & contingency	£25,000	£25,500	£26,010	£26,530	£27,061
	Cos of Goods Sold (COGS)	£80,500	£82,110	£83,752	£85,427	£87,136
	Total Expenditure (B)	£1,817,472	£1,853,821	£1,890,898	£1,928,716	£1,967,290
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training)	£271,000	£276,420	£281,948	£287,587	£293,339
	Contracted services from local authorities and other organisations	£1,204,407	£1,204,407	£1,204,407	£1,204,407	£1,204,407
Donations, grants and fundraising	Grants from local councils, agencies etc					
	Grants from philanthropic trusts/organisations					
	Fundraising income from community / events	£346,000	£370,000	£400,000	£435,000	£465,000
	Other donations					
Other income	Income from interest on reserves, endowment funds etc	£2,000	£2,040	£2,081	£2,122	£2,165
Total Income (C)		£1,823,407	£1,852,867	£1,888,436	£1,929,117	£1,964,911
Balances at year end (i.e. line A - line B + line C)		£5,935	£4,981	£2,519	£2,920	£541

**Applicant's project delivery/development plan - RESTORE
Gardening Specialist at Fleet Meadow Recovery Group - Project Plan**

Activity	Details	Outputs & Outcomes	Who	When
Recruit Garden Specialist worker	Advertise, shortlist, interview, appoint, induct.	Successful recruitment first time	Head of Recovery, HR, Members	Year 1, Quarter 1
Develop understanding of the site	Depending on when recruitments happens the site may be horticulturally dormant. During first growing season, develop an understanding of what already exists and formulate ideas for development.	Garden diary created, showing garden plan plus when things happen horticulturally	Garden Specialist	During Year 1
Site management plan	Based on above, develop an annual plan for horticultural management of the site	List of major actions that need to be taken during the year to ensure the on-going maintenance of gardens/growing spaces.	Garden Specialist, Recovery Co-ordinator	During Year 1
Develop a gardening programme	Devise a range of gardening tasks that provide members with the opportunities to participate in a wide variety of interesting and stimulating activities. -	Programme to provide activities that are; - Suitable for all ages, abilities and physical and mental capability - Provide activity across all seasons/weather - Activities should allow members to derive sense of achievement and hence boost self-esteem/confidence	Garden Specialist, Recovery Co-ordinator, head of Recovery	By the end of year 1
Improve mental well-being of members	Develop activities that lead to measurable increases in the number of Recovery Outcomes recorded.	Increases to be recorded in the following Recovery Outcomes on our system - Reduced social isolation - Improved social skills - Teamwork - People trying new activities - Practical work skills - Improved physical activity/health	Garden Specialist, Recovery Co-ordinator, Recovery Workers	During Year 1
Review existing accredited training	Ensure existing programme is fit for purpose, revise where necessary and promote to	Programme runs each year with at least two people achieving formal	Garden Specialist, HR	By end Q1 Year 2

programme	existing and new members	qualifications on each programme		
Securing employment and volunteering opportunities for members	Look for and develop opportunities for members to secure employment and/or volunteering positions in mainstream community settings.	2 members secure volunteering posts 4 members secure volunteering posts 1 member secure employment & 6 members volunteering posts	Garden Specialist, Recovery Co-ordinator, Employment Coach	Year 2 Year 3 Year 4
Income generation	Look for opportunities to increase income generated by gardening activities at Fleet Meadow. This might include sales of products, donations of cash and 'in-kind', programme of visits to/talks about our garden, community fundraising/'charity of the year' opportunities.	Income increases by 5% year on year	Gardening Specialist, Recovery Co-ordinator, Fundraising Team	From Year 2 onwards
Collaborative working / External Relationships	Develop relationships with organisations, businesses and key individuals in the local community	Long-term positive relationships are developed with at least 5 new organisations/key individuals per year.	Gardening Specialist	From Year 2 onwards
New building	In the event that permissions and fundings are obtained for a new permanent building at Fleet Meadow, develop a hard landscaping plan for the new building.	Plan complements the development, meets approval of neighbours and is sustainable.	Gardening Specialist, Recovery Coordinator	TBC

A2Dominion Housing Group Ltd		Ref	SRev\68
Outreach support service for women, children and men experiencing domestic abuse.			
Total cost (over four years)	£281,136	Amount requested (over four years)	£92,773
Previous grants: Revenue grant 2010/11 – 2012/13 £43,260 (£14,420/year)			
District ward areas covered: All areas			

Scoring

Does the grant reduce each year?		
The grant request is for 33 per cent of the running costs for the four-year period.	Score	0/2
Long term financial plan		
The accounts provided are for the main A2 Dominion organisation, which is one of the largest housing organisations in Southern England and although the accounts are comprehensive they have limited relevance to the local project that requires funding.	Score	0/2
Do they have at least one year's running costs in reserve?		
The organisation has large financial reserves.	Score	1/2
Have they covered their costs for the last two years?		
The organisation made a net surplus of £114 million in 2016 and £73 million in 2015.	Score	1/2
What are their other funding sources?		
At a local level the organisation has secured funding from Oxfordshire County Council of £331,004 towards a domestic abuse service, £35,000 from Children in Need, £90,000 from the Police and Crime Commissioner and £35,000 from Oxford City Council and £54,000 from our own Community Safety Partnership. This funding is secured for differing time periods some to March 2017, June 2017 and one to July 2019.	Score	2/2
Evidence of local need		
Community Safety Team Leader: Following three domestic homicides in the last three years there is a clear need for domestic abuse prevention and support (suggested score 2 points). Equality officer: Strong external level of need and support for this service (suggested score 2 points). Housing team: We regularly receive approaches from victims of domestic abuse who require support with housing issues. Outreach work is essential for helping these clients receive support to remain safely at home (suggested score 2 points). Grants officer: There is good evidence of need for domestic abuse support services.	Score	2/2
Working with our corporate priorities		
Community Safety Team Leader: This service works to meet our thriving communities' priority and meeting resident's needs, however they have not linked their activities to this on their application to clearly show this (suggested score 1 point). Equality officer: Very high levels of contribution towards meeting the equality objective and the general duties under the Equality Act (suggested score 1 point). Housing comments: Their outreach service helps us to achieve the corporate priority for homes and jobs for everyone through the prevention of homelessness (suggested score 1 point). Grants officer: This service contributes to the 'thriving communities' objective (specifically the action around helping delivery the South and Vale Community Safety partnership's annual plan). It also contributes to our equality objective to 'support communities to deliver better outcomes for disadvantaged groups'.	Score	1/2 (counts as 2 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they		

encourage volunteers?			
A volunteering policy wasn't received but the organisation does state that they do have volunteers working alongside paid staff.			Score 0/2
What evidence is there that their service is the best solution to the need identified?			
Community Safety Team Leader: They have a strong track record at meeting this need (suggested score 2 points). Equality officer: Significant levels of evidence that this is the best solution to meet the identified need (suggested score 2 points). Housing: A2 have specialist knowledge in the field and provide a multi-faceted domestic abuse service that's well established and effective (suggested score 2 points).			Score 2/2
How well do other agencies / council staff support the service this organisation provides?			
Community Safety Team Leader: Wholeheartedly supports their service (suggested score 2 points). Equality Officer: Strong support for this service (suggested score 2 points). Housing: We fully support the service provided by A2 and value their contribution towards preventing homelessness (suggested score 2 points).			Score 2/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets seem low and equate to one person per day being supported to complete a safety plan and 20 people in 2017-18 being supported to access community based programmes.			Score 1/2
How achievable/reasonable is their project delivery/development plan?			
The delivery plan is very unclear.			Score 0/2
What is the funding for?			
The project is the continuation of an existing partnership outreach project to support women, children and men experiencing domestic abuse in South and Vale.			Score 0/2
Total score	13/26	Recommended Grant	£0

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>This project is directly linked to the Oxfordshire Violence Against Women and Girls Strategy, and the Oxfordshire Domestic Abuse Strategy. Domestic Abuse is at the forefront of Community Safety and Child Safeguarding agendas locally and nationally. It cross cuts with other significant agenda including Adult Safeguarding; Health and Wellbeing Board development; troubled/thriving Families work, and Equalities obligations. There is a consultation process currently in progress in relation to domestic abuse services in Oxfordshire, however the results have not yet been published. What we do have is regular feed-back from clients which is submitted to the CSP on a quarterly basis.</p> <p>The Neighbourhood Police Team for South Oxfordshire and Vale of the White Horse operates a "Top 10" list of Cases of Concern, whereby repeat call outs for domestic abuse incidents that are not considered high risk are considered and discussed after the MARAC, by the attending agencies in order to provide intervention.</p> <p>Typically, Domestic Homicide Reviews indicate that homicide cases have rarely been classified as "high" risk. The nature of risk is dynamic, and can escalate quickly.</p> <p>In South Oxfordshire there have been four Domestic Homicide Reviews since 2013 (one of which was a combined Serious Case Review). The government definition of domestic abuse has been extended to</p>

	<p>include 16 and 17 year olds, and to incorporate "coercive control". There is also more of an onus on Safeguarding Adults, with the amendment of the Care Act, which highlights the significance of domestic abuse within the aging population.</p> <p>As members of the Oxfordshire Domestic Abuse Champions network and trainers in West Berkshire for the domestic abuse champions, we are experienced in not only providing frontline services to victims, but also sharing expertise and advice with partner agencies to increase understanding of domestic abuse with the aim of improving practice. We have delivered workshops in schools to raise an awareness of healthy relationships and create a safe space to open dialogue, so that young people of both sexes, irrespective of sexual orientation can reflect on what is a positive relationship, and what sort of behaviours may be controlling or abusive.</p> <p>Waiting lists for the current service have already been evidenced in a previous answer.</p> <p>We anticipate that in securing this grant, there will be a reduction in pressure on the CSP budget, which currently provides sole financial support for this project.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Oxfordshire Domestic Abuse Services have been providing the domestic abuse outreach service since 2008, and as such, we have experience, local knowledge and partnership relationships to provide a high quality service.</p> <p>Our services consist of Helpline/Access Service, Refuge provision, Outreach in 3 of the 4 Oxfordshire districts, The Anchor Programme (specialist provision for victims of domestic abuse with complex needs).</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Women, children and men experiencing, or at risk of domestic abuse will benefit from this project.</p> <p>A2Dominion Group (Oxfordshire & West Berkshire Domestic Abuse Services) currently provide the county domestic abuse Helpline and Access Service. Referrals to this central point are risk assessed and triaged to minimise duplication, maximise frontline hours with service users, and reduce the amount of assessments clients are subject to. Careful risk assessments underpin all our work. Close working with the police, IDVA service and other agencies enables us to intervene effectively, and provide Safety Planning advice. Much domestic violence includes sexual violence, but victims are often reluctant to disclose this until they are safe.</p> <p>Support for victims also includes assessing whether there are children at risk, or failing to thrive within a turbulent home environment. Early identification and effective preventative work aims to maximise the opportunities for children to thrive, and minimise developmental difficulties which can have significant effects on life chances, quality of life, and developing healthy relationships.</p>

Applicant's financial forecast - A2Dominion Housing Group Ltd (their application form gave more detail around income towards this service and it will be available in the meeting if required)

<u>Expenditure</u>		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs					
	Outreach Worker 35 hours	26505	£27,185	£27,882	£28,597	£29,330
	Outreach Worker 23 hours	17416.7	£17,863	£18,321	£18,791	£19,273
	Team Leader	5276.11	£5,582	£5,726	£5,872	£6,023
	Service Manager	6899.71	£6,848	£6,952	£7,059	£7,240
	Training and development (all staff and volunteers)	£360	£360	£360	£360	£360
	Expenses	864	£864	£864	£864	£854
	Agency fees and other related employment costs	360	£360	£360	£360	£360
Building costs	Rent/mortgage					
	Business rates					
	Gas					
	Water					
	Electricity					
Services	Total					
	Waste collection/disposal					
	TV license/packages					
	Wi-Fi/broadband					
	Phone Line					
	Building maintenance					
	Cleaning					
	Alarm/Emergency lighting maintenance					
	Legal Costs for staff contracts etc					
	Window cleaning/land scaping					
Supplies, equipment and consumables	Stationery and postage					
	ICT development	£360	£360	£360	£360	£360
	Meetings costs					
	Publicity and marketing					
	Furniture, equipment and maintenance					
Professional costs	Building Insurance					
	Trustee Insurance					
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc)					
Other costs	Total overhead costs- Payroll, Offices, Human Resources, Security	£8,706	£8,706	£8,706	£8,706	£8,706
	Total Expenditure (B)	£66,748	£68,128	£69,532	£70,970	£72,506
<u>Income</u>		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)					
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU					
	Grants from philanthropic					
	Fundraising income from community / events					
	Other donations					
Other income	Income from interest on reserves, endowment funds etc					
	Total Income (C)	£0	£0	£0	£0	£0
	Balances at year end (i.e. line A - line B + line C)	-£66,748	-£134,876	-£204,407	-£275,377	-£347,884

Achievements this year

Completed training:

- DASH
- DMO/Modus
- FGM
- Independent Living
- Child Protection
- Safeguarding Adults
- Delivering Service Excellence
- Domestic Abuse Champions

Partnership working:

- MARAC and Cases of Concern meetings attended every month by Outreach.
- Successful work with Thames Valley Police and other agencies.
- Take on 4-5 extra cases from Police in order to reduce volume of calls to them
- Update Police and other agencies accordingly.

Updates from Quarter 3:

- Increased number of referrals from 31 in Q2 to 34 in Q3- **Continue trend.**
- Reduced waiting times from the first two quarters from 43 days (at its peak) to 10 days max in Q3- **Continue trend.**
- 44 children in Vale and 38 Children in South supported indirectly this quarter. **Continue trend.**
- Supporting 3 elderly clients. **Continue trend** under new Care Act definitions.

Support in the hotspots

- Currently running a support group in Henley on weekends, children attend too. **Continue trend.**
- Freedom Programme running in Abingdon (Wantage clients attend) . **Continue trend.**
- Currently working on: Initiating support groups in hot spots that are run by clients who have previously been supported by ODAS. **Continue trend.**



Earth Trust		Ref	SRev\71
Volunteering Development Programme to increase the number volunteers working with them to care for local environmental assets.			
Total cost (over four years)	£302,800	Amount requested (over four years)	£75,000
Previous grants: Revenue grant 2013/14 – 2016/17 £20,000 (£5,000/year) Revenue Grant 2010/11 – 2012/13 £24,600 (£8,200/year – under previous name – Northmoor Trust)			

District ward areas covered:

Berinsfield, Sandford & The Wittenhams, Didcot West, Didcot South, Didcot North East, Cholsey, Benson & Crowmarsh, Wallingford

Scoring

Does the grant reduce each year?		
No, it increases in year two, before starting to reduce by significant amounts in years three and four, although the percentage requested does reduce each year.	Score	1/2
Long term financial plan		
Their income and expenditure plan provided covers this specific service, rather than the organisation overall costs, so we can't be sure how robust their overall financial plan is. The costs are increasing significantly from this financial year to the next, but then level out. They are expecting to make a small loss each year on this project.	Score	1/2
Do they have at least one year's running costs in reserve?		
Their reserve policy is to keep 12 months operational costs in reserve, and do not appear to be meeting this. However, their endowment fund has over 11.5 million in it.	Score	0/2
Have they covered their costs for the last two years?		
They made a small surplus in 2015 but a substantially bigger loss in 2016.	Score	1/2
What are their other funding sources?		
They are relying entirely on grants to fund this volunteering service. They have another major grant secured for four years, but it is not ring-fenced for this service, so could be spent elsewhere.	Score	1/2
They have include some of their own staff time as an income stream as well as an expense. We aren't sure how they can include their own staff time as an income stream.		
Evidence of local need		
Equality officer: Some external research relating to volunteering and their organisation generally, but not the need to increase the already impressive number of volunteers (suggested score 1 point). Corporate Projects Officer: There is a clear need to protect the local environment and it's good for the volunteers themselves (suggested score 2 points). Grants officer: While there is evidence of need for the environmental work the organisation provide there is less evidence that they need to expand this level of resource to secure additional volunteers and why they couldn't use an existing volunteer recruitment service (like Do-IT or similar). The council is developing its own volunteering strategy and services to support organisations to encourage and recruit volunteers which this might duplicate.	Score	2/2
Working with our corporate priorities		
Equality officer: Contributes towards encouraging community cohesion. It is unclear from the project plan/volunteering strategy how they intend to recruit a full spectrum of volunteers (suggested score 1 point). Corporate Projects Officer: Very high levels of contribution to several priorities, a good spread across the corporate plan (suggested score 2 points).	Score	1/2 (counts as 2 points as

Grants officer comment: This service will contribute to our 'thriving communities' priority (especially around volunteering) and to one of our equality objectives.		weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
Corporate Projects Officer: While we are aware they have a volunteering policy, it wasn't included with their application. They have a proven track record for recruiting and training volunteers (suggested score 1 point).	Score	1/2
Grants officer: They have not included a copy of their volunteering policy, but they have confirmed they are due to update it in January 2017. Officers suggest that if awarded they must provide us with an updated copy of their policy.		
What evidence is there that their service is the best solution to the need identified?		
Equality officer: There is potential to involve vulnerable and disabled people which could help to improve their quality of life. There is also the opportunity to work with other groups such as Restore who have also applied for a grant to deliver similar services (suggested score 1 point).	Score	0/2
Corporate Projects Officer: They are well placed to manage their own volunteer recruitment and management (suggested score 2 points).		
Grants Officer: They already have a good track record of recruiting their own volunteers but there is a risk of duplicating work that other organisations are already offering (volunteer broker services like OCVA or DO-IT). We are developing our own services to encourage volunteering which might also overlap.		
How well do other agencies / council staff support the service this organisation provides?		
Equality officer: Supports this service so long as the organisation is clear how they will recruit vulnerable and or disabled people (suggested score 1 point).	Score	1/2
Corporate Projects Officer: Strong support for their service as it will have a positive impact on their work and for residents. They are genuinely committed to people and the environment (suggested score 2 points).		
Grants officer: There is general support for the organisation, but not specifically to run this in-house volunteer service.		
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		
Their activity targets seem a bit ambitious (an average of additional 22,500 volunteer hours on top of their existing levels (149,000 in 2015/16).	Score	1/2
We would have liked to seen targets that focussed on improvements to their operations like income generation, cost savings and/or collaborative working.		
How achievable/reasonable is their project delivery/development plan?		
Their project plan is brief, with just 11 targets and little detail. It appears to be a brief initial plan as one action for mid-2017 is to develop a detailed project and implementation plan.	Score	1/2
What is the funding for?		
Predominantly to employ a volunteer manager (1.3FTE) to manage and develop their existing volunteering programme.	Score	1/2
Other observations and comments		
I am concerned about the cost of this service and that it could duplicate some existing volunteering services. I would be interested to compare their costs and proposed work with what other organisations with similar numbers of volunteers are doing to see if the costs are comparable..		
Total score	13/26	Recommended Grant
		£0

Applicant responses

How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?

Earth Trust recently developed a 10-year Volunteering Strategy, underpinned by a survey of our current volunteers. This identified the need to develop what we can offer at Earth Trust and on the community green spaces we manage and a need to stimulate projects enabling a broader range of volunteering opportunities and to break down barriers to volunteering.

The population of Oxfordshire, South Oxfordshire in particular, is set to increase by 13% during the lifetime of our strategy. There are significant plans for development along the knowledge spine, attracting more skilled employees to the area with the beautiful countryside being a big bonus to living and working here. The Oxfordshire Skills Strategy has identified a skills shortage in the local population relating to the sciences and certain areas of infrastructure for which opportunities exist to help individuals develop relevant and transferable skills to support them in to employment.

The last Community Life Survey commissioned by the Cabinet Office, found that roughly 1/3 of people interviewed volunteered regularly. Given this, and in relation to forecast growth in South Oxfordshire, the potential for this project is great. 'Our place, our future',

A significant barrier to volunteering often cited is lack of confidence; Brian Carr, Chief Executive BVSC, The Centre for Voluntary Action, wrote in an article in The Guardian a few years ago;

'One of the biggest barriers [to volunteering] was around lack of confidence..... Conversely, our evidence shows again and again that volunteering can improve confidence (not to mention health, employability and self-esteem).'

Our own experience has demonstrated that a barrier to supporting Earth Trust has also been lack of public transport and our rural location, cuts to rural public transport will add to this problem, excluding individuals who already face significant barriers to opportunities.

South Oxfordshire DC Corporate Plan 2016-20 also makes a commitment to supporting communities to help themselves and recognises the key role volunteers have to play, all linking to healthy, connected and economically thriving communities. A key priority in this plan is to expand volunteering, this project will help achieve that.

Local greenspaces are often poor quality due to the lack of co-ordinated maintenance, as identified, for example, in the Berinsfield Neighbourhood Development Plan -scoping document. This is an issue that could be addressed through expansion of Earth Trusts volunteer programme.

The Greater Didcot Garden Town vision recognises the importance of green space and the iconic landscape setting of Wittenham Clumps. The wildflower meadows and ancient

archaeological features at Wittenham Clumps are very popular, increased footfall will increase the need for volunteers to conserve it for the future.

The Joseph Rowntree Foundation report, 'Landscapes of Helping' highlights the role of community run projects in creating or improving local facilities such as green space contributing to a sense of community and pride in local areas. Providing opportunities for people to come together to articulate common values and build 'common cause' offers a means to break down barriers and misperceptions, enabling people to appreciate that they have similar values and experiences.

Why is your service is the best solution to meet this need?

Earth Trust has a well established and highly regarded volunteer programme offering a wide range of volunteering opportunities. Earlier this year our volunteers were honoured with The Queen's Award for Voluntary Service, the highest award a voluntary group can receive in the UK. Last year volunteers contributed a staggering 149080 hours of their spare time – that's equivalent to nine full time members of staff. Earth Trust

	<p>provides volunteering opportunities for people of all ages to explore and look after their local environment. The volunteers support us in running special greenspaces, where wildlife thrives alongside a scheduled ancient monument, a working farm, and a nationally renowned research woodland. Other volunteers help facilitate more people to get involved by helping out with events and activities, office administration, and education sessions.</p> <p>With exciting plans in the pipeline to establish a market garden and to improve visitor facilities at the Earth Trust Centre we are ideally placed to provide a first class volunteering programme; supporting, South Oxfordshire 'Our Place, Our Future', inspiring more sustainable and healthier living and engaging individuals and communities in caring for local greenspaces, providing opportunities to gain experience and develop skills.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>The benefits of volunteering are enormous; reducing stress and isolation; building friendships; reaching out in communities; learning new skills; advancing skills for employment; and providing a mechanism to 'give something back', a common reason people volunteer.</p> <p>Recent research by The Conservation Volunteers confirms that involvement in volunteering has a positive impact on attitudes and behaviours towards the environment, lifestyles and willingness to engage in local communities; furthermore the impact increases over time.</p> <p>Area-wide benefits from volunteering include: individuals better equipped for work; reduced costs in terms of healthcare and resource use; and the enhanced amenity value of the Earth Trust sites to local people. This is particularly important in light of the projected growth in population in South Oxfordshire.</p> <p>We will broaden the diversity of people volunteering with us offering a diverse range of volunteering opportunities accessible to all irrespective of background or ability. We will develop our evaluation process to benchmark needs and aspirations of individual volunteers and measure progress against these. We will involve the volunteers in evaluating how well the volunteer programme is meeting the needs of the wider community.</p> <p>We aim to at least double the number of active volunteers from around 300 to 600.</p>

Applicant's financial forecast - Earth Trust

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in this			£0	-£1,333	-£7,172	-£6,276
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	12450	£55,487	£57,152	£58,866	£60,632
	Training and development		£1,000	£1,018	£1,030	£1,046
	Expenses, Travel & Subsistence		£2,325	£2,396	£2,477	£2,558
	Agency fees and other related employment costs					
	Staff /volunteer recruitment costs	200	100	103	106	109
Building costs	Rent/mortgage					
	Business rates					
	Gas					
	Water					
	Electricity					
Services	total allocated to overheads		£12,089	£12,452	£12,826	£13,210
Supplies, equipment and consumables	Stationery and postage					
	ICT		£500	£300	£300	£300
	Meetings costs					
	Publicity and marketing					
	Furniture, equipment and maintenance					
	Personal Protective Equipment		£500	£500	£500	£500
	Website /online resources		£500	£500	£500	£500
Professional costs	Building Insurance					
	Trustee Insurance					
	Public/Employee Liability & Personal Accident					
	Professional fees (accountants, legal, HR etc					
Other costs	Monitoring & Evaluation		£100	£103	£106	£109
Total Expenditure (B)		£12,650	£72,601	£74,524	£76,711	£78,964
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, training fees etc)					
	Contracted services from local authorities and other organisations					
Donations, grants and fundraising	SODC Revenue grant		£23,958	£24,042	£18,000	£9,000
	Grants from philanthropic trusts/organisations	£10,000	£38,446	£35,044	£16,510	
	Fundraising income from community / events					
	Other donations					
	TBC - volunteer sub projects & fundraising		£1,000	£1,500	£10,000	£10,000
	TBC core costs fund raising				£10,000	£10,000
Other income	Earth Trust staff time contribution	£2,650	£7,864	£8,099	£16,684	£33,368
	Earth core contribution to overheads				£6,413	£6,605
Total Income (C)		£12,650	£71,268	£68,685	£77,607	£68,973
Balances at year end (i.e. line A - line B + line C)		£0	-£1,333	-£7,172	-£6,276	-£16,267

Applicant's project delivery/development plan - Earth Trust

	What	When	Who will carry out / lead the activity?	What will activity achieve?
1.	Prepare & submit project proposals for fund raising	From April 2016 - ongoing	Head of Development & project fundraising officer	Raise funds to initiate and maintain volunteer development programme
2.	Recruit staff for new volunteer development manager role	September – December 2016	Head of Development	1.3 FTE staff in post for 1 st January 2017
3.	Review volunteer policy	January 2017-June 2017	Volunteer Development Manager	Ensure policy is consistent with the new developments in the volunteering programme
4.	Produce refreshed processes and documents for volunteer recruitment, induction and ongoing management.	January 2017-June 2017	Volunteer Development Manager	Consistent and effective recruitment and management of volunteers
5.	Produce detailed project implementation plan for year one 2017-18	January 2017 –June 2017	Volunteer Development Manager	Ensure effective and efficient progress towards objectives
6.	Investigate potential for collaborative working with contacts already identified, e.g. OCVA, Community First Oxfordshire, South & Vale carers, SOFEA, Nomad, Job Centres	January –March 2017	Volunteer Development Manager	Develop new relationships to increase levels of collaborative working. Prepare the way to reach more disadvantaged individuals.
7.	Identify other key organisations to develop collaborative working relationships with.	March – December 2017	Volunteer Development Manager	Prepare the way to reach disadvantaged individuals
8.	Produce project development & implementation plans 2018-21		Volunteer Development Manager	Ensure effective and efficient progress towards objectives
9.	Explore and evaluate options for minibus transport – including partnering arrangements, lease & purchase.	January-September 2017	Volunteer Development Manager /Head of Development	Overcome challenge of volunteers travel between community, Earth Trust centre and other volunteering project locations.
10.	Prepare volunteer recruitment campaign plan.	February – June 2017	Volunteer Develop Manager	Prepare for a recruitment campaign in local communities including Didcot & Berinsfield.
11.	Fundraise to support volunteer led sub-projects	As & when projects identified	Project Fundraising Officer	Enable sub-project fulfilment and address shortfall in longer term overall programme funding

MS Therapy Centre Oxfordshire		Ref	SRev\12
Provides a range of complementary therapies for people suffering from Multiple Sclerosis (and some other conditions) including; physiotherapy, osteopathy, massage, foot care, reflexology, acupuncture, and oxygen therapy.			
Total cost (over four years)	£199,320	Amount requested (over four years)	£14,000
Previous grants: No previous grants			

District ward areas covered:
All areas

Scoring

Does the grant reduce each year?		
The grant request is for the same amount each year across all four years. This is because of the low value of the grant request, which is only just within the minimum value that can be applied for and is based on the percentage of beneficiaries from South Oxfordshire.	Score	0/2
Long term financial plan		
The financial plan is comprehensive and appears achievable.	Score	2/2
Do they have at least one year's running costs in reserve?		
The organisation has £35,277 in reserve at 1 January 2016, its annual expenditure the previous financial year was £53,592.	Score	0/2
Have they covered their costs for the last two years?		
In 2015 a small surplus of £3,309, and a small surplus in 2014 of £3,531.	Score	2/2
What are their other funding sources?		
The organisation has identified some other sources of funding but none is secured for 2017-18.	Score	1/2
Evidence of local need		
Equality officer: There is a lack of external evidence to prove the local need, but it's clear people with MS (and other relevant conditions) could benefit (suggested score 1 point).	Score	1/2
Grants officer: The organisation states it is the only local centre (based in Milton Park) providing specialist MS support and offers the use of oxygen therapy to treat MS systems.		
Working with our corporate priorities		
Equality officer: The service offers medium levels of contribution to our equality objectives and to quite a specific group (suggested score 1 point).	Score	1/2 (counts as 2 points as weighted scores)
Grants officer: The service would help to deliver the equality objective to 'support communities to deliver better outcomes for disadvantaged groups and encourage community cohesion'.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation has a volunteering policy and an active volunteer base helping to run the day to day services.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		

Equality officer: This is an adequate solution but could be improved if they could offer a mobile service for people who struggle to get to Milton Park (suggested score 1.5 points).	Score	1/2
How well do other agencies / council staff support the service this organisation provides?		
The organisation works with OXSRAD, MS Society Abingdon, NHS Specialist Community Nurse, MS National Therapy Centres.	Score	1/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		
The targets seem reasonable but there is little data evidence to support this. However, against the low grant request they seem to offer good value for money.	Score	1/2
How achievable/reasonable is their project delivery/development plan?		
The project plan is under developed.	Score	0/2
What is the funding for?		
To fund an existing service with little or no change.	Score	0/2
Total score	13/26	Recommended Grant
		£0

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>MS is an incurable condition. The NHS provides very little practical support for people diagnosed with MS, and no complementary therapies. The therapy centre is a self-help organisation which provides the facilities and therapists so that people can arrange their own treatments. Our 89 members make a donation towards the therapists costs and the oxygen chamber operating costs. The fact that they do this, and that many have been doing so for many years, demonstrates the need.</p> <p>Accurate information is not available, but we believe there are about 1,000 people with multiple sclerosis in Oxfordshire.</p> <p>The National Federation of MS Therapy Centres promotes the use of oxygen therapy to treat the symptoms of MS.</p> <p>As regards cancer sufferers, the Macmillan website now actively promotes oxygen therapy.</p>
Why is your service is the best solution to meet this need?	<p>The MS Therapy Centre on Milton Park is the only one in Oxfordshire (nearest centres are Reading, Swindon and Amersham). No other organisations in the county provide oxygen therapy or the range of therapies that we offer. There are branches of the MS Society in the county, but they provide a different type of service.</p>
Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)	<p>Potentially anyone who has been diagnosed with MS and can get themselves to the Centre, and also those with other conditions who will benefit from oxygen therapy.</p> <p>There are about 100,000 people in the UK with multiple sclerosis. If we extrapolate from that, there are about 1,000 in Oxfordshire, of which about 200 will live in the SODC area.</p>

Applicant's financial forecast - MS Therapy Centre Oxfordshire

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A) (include savings and reserves in		£35,277	£41,202	£34,707	£32,847	£30,102
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs (please list all paid posts	£12,300	£12,500	£12,750	£13,000	£13,250
	Training and development (all staff and	£200	£250	£250	£250	£250
	Expenses	£0	£0	£0	£0	£0
	Agency fees and other related employment	£0	£0	£0	£0	£0
	Self employed therapists	£19,700	£20,000	£20,500	£21,000	£21,500
Building costs	Rent/mortgage	£0	£0	£0	£0	£0
	Business rates	£0	£0	£0	£0	£0
	Gas	£0	£0	£0	£0	£0
	Water	£200	£210	£210	£220	£220
	Electricity	£1,100	£1,150	£1,200	£1,300	£1,300
Services	Total					
	Wi-Fi/broadband	£0	£0	£0	£0	£0
	Phone Line	£400	£400	£440	£440	£480
	Building maintenance	£1,000	£1,000	£1,000	£1,000	£1,000
	Cleaning	£975	£1,000	£1,025	£1,050	£1,075
	Window cleaning/land scaping	£0	£0	£0	£0	£0
Supplies, equipment and consumables	Stationery and postage	£0	£0	£0	£0	£0
	ICT development	£0	£0	£0	£0	£0
	Meetings costs	£0	£0	£0	£0	£0
	Publicity and marketing	£0	£0	£0	£0	£0
	Furniture, equipment and maintenance	£0	£0	£0	£0	£0
	Gym equipment	£430	£500	£500	£500	£500
Professional costs	Building Insurance	£0	£0	£0	£0	£0
	Trustee Insurance	£0	£0	£0	£0	£0
	Public/Employee Liability & Personal Accident	£0	£0	£0	£0	£0
	Professional fees	£0	£0	£0	£0	£0
	Insurance (one premium covers all categories	£1,735	£1,800	£1,850	£1,900	£1,950
Other costs	Liquid oxygen for use in oxygen chamber	£5,700	£5,800	£5,900	£6,000	£6,100
	Membership of National MS Therapy Centres f	£100	£100	£100	£100	£100
	Fundraising expenses	£1,300	£1,350	£1,400	£1,450	£1,500
	Sundry	£800	£800	£800	£800	£800
	Replacement of deluge tank (insurance requir	£0	£5,500	£0	£0	£0
		£45,940	£52,360	£47,925	£49,010	£50,025
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)	£1,900	£1,300	£1,300	£1,300	£1,300
	Earned income (charity shops, fees for	£0	£0	£0	£0	£0
	Contracted services from local authorities and other organisations	£0	£0	£0	£0	£0
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£35	£35	£35	£35	£35
	Grants from philanthropic	£6,500	£1,000	£1,000	£1,000	£1,000
	Fundraising income from community / events	£9,000	£9,000	£9,000	£9,000	£9,000
	Other donations	£3,730	£3,730	£3,730	£3,730	£3,730
	Donations from members towards therapies	£23,900	£24,000	£24,200	£24,400	£24,600
	Gift Aid	£6,200	£6,200	£6,200	£6,200	£6,200
Other income	Income from interest on reserves,	£100	£100	£100	£100	£100
	Sundry	£500	£500	£500	£500	£500
Total Income (C)		£51,865	£45,865	£46,065	£46,265	£46,465
Balances at year end (i.e. line A - line B +		£41,202	£34,707	£32,847	£30,102	£26,542

Applicant's project delivery/development plan - MS Therapy Centre Oxfordshire

Project Delivery and Development Plans

The Centre has been open since 1984, and has expanded in that time, but is still fairly small. It provides a service that is highly valued and is run by a manager who is part time and paid, and a team of dedicated volunteers.

Our main aim is to increase the number of people with MS who use the Centre.

In order to provide our services, we collaborate with other organisations as follows:

On Milton Park

MEPC (the landlord) – let us have the land rent-free (we own the portacabins that form our premises). We also attend their “Mingle at Milton” events in order to get ourselves better known, and hopefully to find more sponsors. They also let us have cake sales in the shopping area and occasionally the proceeds from a fundraising event.

RPS – have given us an annual donation of £1,000 for several years.

Across Oxfordshire

OXSRAD - the Integrated Sport and Leisure Centre, refer members to us and vice versa

MS Society (Abingdon branch) – sharing information, telling each others members about what they offer

MS nurses - based at the JR hospital

OCVA – they help promote us, and also let us know what's going on in the voluntary sector locally

Didcot First – let us know what's going on, including grants that are available

Nationally

MS National Therapy Centres – provide technical expertise on oxygen therapy, and also some help with getting the best value for money through bulk buying

Professional

We have procured the services of an independent examiner for the accounts and also a solicitor, both of which provide their services for free.

Henley Rowing Club		Ref	SRev\33
Outreach work to encourage young people, NHS referrals, young mothers and older people into rowing.			
Total cost (over four years)	£1,050,000	Amount requested (over four years)	£94,300
Previous grants: No previous grants			

District ward areas covered:

Watlington, Benson & Crowmarsh, Goring, Kidmore End & Whitchurch, Sonning Common, Woodcote & Rotherfield, Henley-on-Thames

Scoring

Does the grant reduce each year?		
The grant request reduces very slightly over the four year period.	Score	1/2
Long term financial plan		
The financial plan is reasonable clear for the grant period but shows a considerable increase in staff salaries from the accounts provided up to 31 August 2015.	Score	1/2
Do they have at least one year's running costs in reserve?		
The organisation does not hold reserves to cover one year's running costs. No reserves policy is shown.	Score	0/2
Have they covered their costs for the last two years?		
The organisation made a loss of £3,757 in 2014 and a profit of £34,401 in 2015.	Score	1/2
What are their other funding sources?		
The organisation has identified £236,000 in funding for their general running costs through subscriptions, fundraising and hire of the facilities, there is some security around this based on evidence from previous years.	Score	1/2
Evidence of local need		
Leisure participation officer: The council's participation team and partner organisations are already working to deliver this type of work across the whole community, which shows a need in the district to activate the community, but not specifically through rowing (suggested score 1 point).	Score	1/2
Grants Officer: The local need is from requests from local medical professionals, who have expressed a requirement for aftercare post-operative exercise programmes for adults as well as requests from local schools to re-introduce school rowing activities.		
Working with our corporate priorities		
Grants officer: This service offers minimal contribution to our thriving communities' priority. It is unclear how many people this service would reach and so this has been scored as a medium contribution to our objectives.	Score	1/2 (counts as 2 points as weighted scores)
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
The organisation provided a Guide for Parents, which does include a small section about volunteering but no formal policy is provided. They do have a network of over 50 volunteers.	Score	1/2
What evidence is there that their service is the best solution to the need		

identified?			
Leisure participation officer: This project duplicates some of the work our own participation team already deliver by working with partners (at a substantial cost). We suggest it would be better if the Club worked with us in this way rather than operating independently (suggested score 1 points).		Score	1/2
Grants Officer: The organisation can provide physical development programmes for all ages and abilities but it is not clear that the organisation would be the only or preferred option.			
How well do other agencies / council staff support the service this organisation provides?			
Local schools and GP surgeries are listed as supporting the programmes offered by the organisation. However, the council's leisure participation officer has some concerns (see corporate priorities section).		Score	1/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?			
The targets provided are relatively low over the four year period and it is unclear how they have been established.		Score	0/2
How achievable/reasonable is their project delivery/development plan?			
The development plan is reasonable there is some concerns over the timescales.		Score	1/2
What is the funding for?			
The funding is to continue and improve an existing service and to increase the number of beneficiaries.		Score	1/2
Other comments and feedback			
Leisure participation officer comment: Although the application states it will increase participation, the targets provided are extremely low, in a small geographical area, against the costs of the service.			
Many other sports clubs deliver similar projects without large amounts of revenue funding but work with OXSPA (the county sports partnership) and the local authority to obtain school club link funding, funding through Sportivate or other external funding streams such as Sport England grants to deliver coaching courses in schools and for the community.			
The applicant states they will deliver courses from NHS referrals but existing projects such as Go Active, Get Healthy have these referrals already established, and if the applicant manages to set up referrals there is no guarantee they would want to participate in rowing.			
I think the project costs could be greatly reduced (we have worked with rowing clubs in the past who have delivered similar community sessions for much less) and that it would be more appropriate for the Club to apply for more specific sports funding from another provider for example Sport England.			
Total score	12/26	Recommended Grant	£0

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	Discussions have been held with local medical professionals (GP's surgeries and Townlands Community Hospital) concerning the aftercare for post operative/event patients. Being able to provide exercise programmes is a key need and we are being asked if we are able to progress this, and to make sure we advertise what we can offer through surgeries. We have been in communication with staff at several local schools, some

	<p>of which HRC used to have programmes in the past. The need to introduce children to healthy exercise is more necessary now than ever, with less time and resource allocated by schools in support of exercise programmes. Rowing and associated training is highly regarded as a lifetime sporting activity providing full body exercise and conditioning as well as strong well-being, team working, and social connection benefits. The in school HRC programmes have now ceased due to lack of funding but the demand very much still exists according to Head Teachers.</p> <p>We have very many enquiries from adults of all ages including many retired people available during daytime hours to join exercise programmes. To date we have not been able to resource daytime exercise classes of this nature but are aware of the strong pull to be able to do so and want to be able to resource to address this need.</p>
<p>Why is your service is the best solution to meet this need?</p>	<p>Henley Rowing Club is ideally suited to support the identified needs because;</p> <ol style="list-style-type: none"> 1. We have trained and experienced volunteer staff and access to a network of paid trainers in all disciplines to support exercise and physical development programmes for people of all ages and physical capability. 2. We have the building facilities and equipment to provide indoor exercise classes of all kinds, a comprehensive range of gym equipment for strengthening and conditioning, and then the outdoor rowing equipment to cater for beginners up to elite standard. If this programme is successful the club will consider to seek capital funding to even better meet the needs of some of the programme groups be that for access, bespoke rehabilitation equipment etc to ensure future sustainability of the broader services offering. 3. All year round, the environment by and on the river is inspiring and a major reason people enjoy learning rowing activities and taking on board a healthy new lifestyle. 4. We are conveniently located 5 mins walk from Henley town centre, with ample parking, cafe / bar and changing facilities, and can focus on programme groups completely Mon to Fri day times without interruption from other club groups or activities.
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Children from local schools, particularly girls from being involved in a sporting activity, building not only competence and a healthy lifestyle but also team working and contributing to a community organisation.</p> <p>Henley area referred health patients. In particular post operative or event patients where there is a need for fitness training. In addition, the current crisis of obesity and Type 2 diabetes requires a structured fitness and weight loss programme that is not currently catered for and is outside the current NHS remit.</p> <p>Non active or low activity adults, particularly women whose children have now entered school and want to take up or resume a sporting activity, thus protecting their and their family's wellbeing.</p>

Applicant's financial forecast - Henley Rowing Club

		2016/17	2017/18	2018/19	2019/20	2020-21
Balance at start of year (A)		£23,745	£43,145	£51,019	£58,658	£65,117
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	£30,600	£30,600	£31,518	£32,464	£33,437
	Training and development	£1,200	£1,700	£1,751	£1,804	£1,858
	Expenses (player expense payments)	£3,000	£3,000	£3,090	£3,183	£3,278
	Agency fees + other related costs	£29,750	£29,750	£30,643	£31,562	£32,509
	Rev. Grant related services trainer costs excluding £6k Manager charge	£31,100	£23,000	£14,800	£1,400	£0
Building costs	Rent/mortgage	£9,000	£9,270	£9,548	£9,835	£10,130
	Business rates	£2,650	£2,730	£2,811	£2,896	£2,983
	Gas	£1,500	£2,200	£2,266	£2,334	£2,404
	Water	£600	£618	£637	£656	£675
	Electricity	£3,500	£3,605	£3,713	£3,825	£3,939
Services	Waste collection/disposal	£1,300	£1,339	£1,379	£1,421	£1,463
	TV license/packages	£200	£206	£212	£219	£225
	Wi-Fi/broadband and phone	£1,500	£1,545	£1,591	£1,639	£1,688
	Building maintenance	£6,500	£6,695	£6,896	£7,103	£7,316
	Cleaning	£7,900	£8,137	£8,381	£8,633	£8,892
	Alarm/Emergency lighting maintenance	£1,050	£1,082	£1,114	£1,147	£1,182
	Window cleaning/land scaping	£500	£515	£530	£546	£563
	Septic tank emptying	£2,200	£2,266	£2,334	£2,404	£2,476
Supplies, equipment and consumables	Stationery and postage	£1,500	£1,545	£1,591	£1,639	£1,688
	ICT development	£0	£0	£0	£0	£0
	Meetings costs	£12,450	£12,824	£13,208	£13,604	£14,013
	Kit for sale	£14,950	£15,399	£15,860	£16,336	£16,826
	Gym and misc. items	£6,000	£6,180	£6,365	£6,556	£6,753
	Boat and oar repairs	£15,000	£17,000	£19,000	£22,000	£22,000
	Ergo, safety boat and trailer maintenance	£5,500	£5,665	£5,835	£6,010	£6,190
	New Boats and blades	£28,000	£40,000	£40,000	£40,000	£40,000
Professional costs	Insurance (all insurances together)	£18,000	£18,540	£19,096	£19,669	£20,259
	Professional fees	£4,500	£4,635	£4,774	£4,917	£5,065
	British Rowing membership registration	£3,500	£3,605	£3,713	£3,825	£3,939
	Env agency boat licences	£3,250	£3,348	£3,448	£3,551	£3,658
Other costs	General admin costs	£2,500	£2,575	£2,652	£2,732	£2,814
	Fundraising expenses	£300	£309	£318	£328	£338
	Event tow vehicles	£700	£721	£743	£765	£788
	Safety launch fuel	£800	£824	£849	£874	£900
	Coaching hall hire	£2,000	£2,060	£2,122	£2,185	£2,251
	Event seat fees costs	£700	£721	£743	£765	£788
Total Expenditure (B)		£253,700	£264,207	£263,533	£258,825	£263,287
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Subscriptions	£102,600	£105,678	£108,848	£112,114	£115,477
	Earned income	£0	£0	£0	£0	£0
	Contracted services from local authorities etc.	£0	£0	£0	£0	£0
	Rowing income (equipment rental and sales)	£77,400	£79,722	£82,114	£84,577	£87,114
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£37,100	£29,000	£20,800	£7,400	£0
	Grants from philanthropic trusts/organisations	£0	£0	£0	£0	£0
	Fundraising income from community / events	£8,500	£8,755	£9,018	£9,288	£9,567
	Other donations	£500	£515	£530	£546	£563
	Facility hire, events and kit sales fundraising	£47,000	£48,410	£49,862	£51,358	£52,899
Other income	Income from interest on savings etc	£0	£0	£0	£0	£0
Total Income (C)		£273,100	£272,080	£271,172	£265,284	£265,620
Balances at year end (i.e. line A - line B + line C)		£43,145	£51,019	£58,658	£65,117	£67,450

Applicant's project delivery/development plan - Henley Rowing Club

Prepared by RB. Reviewed by committee 7 November 2016

Plan basis

The 3 year plan takes a SWOT (Strengths, Weaknesses, Opportunities, Threats) assessment of the Club and then prioritises an action plan to build towards our mission.

Mission statement

'Henley Rowing Club caters for everyone, fulfilling every individual's competitive aspirations'.

(Where everyone means all ethnicities, ages, physical capabilities, and competitive aspiration means provision from recreational right up to enabling entry to the highest level events).

Effective plan delivery

This process is not new but reviewing previous plans suggests we struggle to deliver sufficient progress year on year. The key learning is to be realistic, clear and tenacious, making sure all plan objectives and actions are very specific, have willing owners, are time bound, and the plan evolves as there may be a sequence of actions to achieve an objective which may not all be articulated at the start. The overall plan is to be reviewed as a regular committee agenda item to ensure actions are updated, progress is being made, and where it isn't support resource is allocated to get back on track.

Objectives and Action plan

Objective	Plan	Specific actions	Lead Owner	Action due date	Comments
Income generation	Sponsorship	Package options, targets, approach plan, to be prepared for committee alignment	BM or BA	Nov 16	Team tbc BA, BM, MB, SD, JP, DM,SG
		Sell Website advertising			
	Capital Grants	Understand grants available, apply as soon as 2017 budgets open	BA or RB	Dec 16	Team BA, RB, BM, SWA
	Expand merchandising of HRC brand products	Prepare plan for review	DM, SG	Dec 16	
Membership and squads development	Income through increased off peak utilisation	Develop options and plan (commercial events)	BM	Dec 16	
		Further adult health and fitness classes	BM	Jan 17	
		Viability of 'off peak' (9-4 weekdays and w/end afternoons) lower cost membership for mums	BM	Jan 17	Decision needed on viability
	Providing Courses & Training Camps (Provisional against receiving revenue grant)	Continue to provide a range of Adult and Junior Learn to Row courses in addition to holiday camps for juniors. To enhance this offering with daytime courses for adults, in collaboration with doctors' surgeries, charities & support organisations. To provide an outreach rowing programme, to introduce rowing into local schools.	BM	Spring /Summer 2017	
	Increasing access to rowing and broader health and fitness provision	Revenue Grant submission to resource training for different age and physical ability groups	RB	Nov 16	Team BA, RB, BM Stage 2 application 28 Nov
		Communicate learn to row entry options (price barrier)	BM	Dec 16	
Senior squad development and sustainability	Clarify requirements, gap and set plan for committee sign on	SWA	Dec 16	Include Head Coach / Tech. Dir. thinking	
Junior recreational gap fill, and other novice group considerations?	Clarify demand and bring back reco to committee	BM	Spring 17		
Improve member retention	Incentives or other plan based on insights	BA	Mar 17		
Facilities development	Pontoon replacement	Quotation provided, requires funding to commit	RB	Tbc	£43k quoted fitted, plus old pontoon removal = c.£50k.
	Frontage bar / function room and deck expansion	Design and costing, and evaluation of payback	BM or RB	Jan 16	

Objective	Plan	Specific actions	Lead Owner	Action due date	Comments
Communication and media development	Website improvement; members area	For timetables, events, help requests, volunteer and other role gap ads, etc	PD	Tbc	Team PD, MH, Requires an IT support person
Governance	Improve club governance and capabilities checks with Clubmark	Detail gaps and plan for committee alignment	MH	Dec 16	Team needed ?
Succession planning	Plan Succession for volunteer coaches and other key roles i.e. deputies for Chair, Treasurer, Manager, Captain, CWO, WSO	Share management and coach organisation chart, and clarify imminent gaps, deputies, and advertise to fill.	IP ?	Jan 17	
Risk management	Incorporate the club	Cost estimate provided, next step is instruct solicitors and go ahead with clear incorporation plan	DH	Tbc	Requires £5-8k to be agreed to start the process in 2017 RB, BR support
	Keep ahead of compliance requirements	3 monthly committee review summarising BR and other updates (welfare and safety policies and plans)	JL, WSO	Jan 17	
Future budget planning	Capital requirement assessment	Understand ideal annual capital to keep fleet and equipment to good standard	IP	Jan 17	

LIFE 2009		Ref	SRev\5
Supported accommodation (3-4 units) and life skills training for young mothers in Didcot.			
Total cost (over four years)	£205,195	Amount requested (over four years)	£64,676
Previous grants: Revenue grant 2013/14 – 2016/17 £51,624 (£12,906/year) Revenue grant 2010/11-2012/13 £60,128 (£12,026/year)			
District ward areas covered: Didcot West, Didcot South, Didcot North East			

Scoring

Does the grant reduce each year?		
There is a small reduction over the grant period (less than ten per cent in years two and four and just over in year three).	Score	1/2
Long term financial plan		
Their financial forecast shows income and expenditure balancing exactly each year of the four year period, which is a little concerning.	Score	1/2
They have forecast a significant increase (£10,000) from 2016/17 to the first year of the grant with little explanation for the increase.		
Do they have at least one year's running costs in reserve?		
Their policy is to have at least 3 to 6 months running costs in their unrestricted reserves at all times, which they did at their last year end.	Score	1/2
Have they covered their costs for the last two years?		
No, they covered their costs in one of the last two financial years and made a small deficit in the other.	Score	1/2
What are their other funding sources?		
Their other funding sources are predominantly income from rent (from their users) with a small amount (£3,200) in other grants.	Score	1/2
Evidence of local need		
Housing: There is a clear local need for support for young mothers and homelessness is an increasing issue across South Oxfordshire, which includes newly formed families struggling to access suitable accommodation (suggested score 2 points).	Score	1/2
Grants officer: There is some research to potentially support a local need.		
Working with our corporate priorities		
Housing: It offers a small amount of contribution to the homes and jobs for everyone priority (suggested score 1 point).	Score	0/2
Grants officer: This service offers minimal contribution towards the homes and jobs for everyone and our equality objective around supporting disadvantaged groups as the number of beneficiaries is so low.		
How extensive is the organisation's volunteering policy and how well do they encourage volunteers?		
They have a volunteering policy and their overarching organisation uses volunteers but it is not clear how many work for the Didcot property. Details of this should be a condition of any grant awarded.	Score	2/2
What evidence is there that their service is the best solution to the need identified?		
Housing: It does provide a solution for a small number of people. However, there are other options for this client group. Access for our housing needs clients is however very	Score	1/2

restricted and we are not currently able to make direct referrals (suggested score 1 point). Grants Officer: Their service offers a solution to a very small number of beneficiaries compared to the need.		
How well do other agencies / council staff support the service this organisation provides?		
Housing: We do support the service for the important client group it helps. However, the numbers of those assisted are relatively small and access to the service is very restricted (suggested score 1 point). Grants officer: There is some support for this type of service but there are concerns around accessing the facilities and the low number of people benefiting.	Score	1/2
What evidence is there that their suggested outcomes/targets for work in South Oxfordshire are reasonable and achievable?		
The number of people who will benefit each year are minimal at an average of nine young mothers a year. Their targets increase each year, but officers are concerned how they will manage this as they have a limited number of properties/units available. Their organisations targets are also low.	Score	0/2
How achievable/reasonable is their project delivery/development plan?		
Their project plan is very high level for their overarching organisation and the Didcot branch seems to feature very little. There doesn't seem to be clear deliverables for the Didcot area within it for officers to confirm if they are possible or not.	Score	0/2
What is the funding for?		
Continuing their existing service with a small amount of growth.	Score	1/2
Total score	11/26	Recommended Grant
		£0

Applicant responses	
How did you identify a local need for a service like yours (ideally using third party research, strategies or support this)?	<p>Although the rates of teenage pregnancy are falling nationally and locally, there will always be unsupported young mothers in need of help. The District's population is projected to increase by 12.9% between 2006 - 2026 (Oxfordshire County Council projections 2008); of these 2,000 will be people in the child bearing age group 15-29 years. Most will be in concealed households, with 50.7% in the 20-24 age group. The data indicates that 62.3% of concealed households are priced out of the private rental market and 93.7% are unable to afford to buy in the local owner occupied market. (SODC Housing Needs Analysis 2008). In absolute terms the numbers will grow and exceed supply.</p> <p>The Life house is a key partner in SODC's strategy to prevent homelessness. 70% of those accepted as homeless in 2013/14 were households containing children or a pregnant woman. There is no other specific supported housing provision for young parents in Didcot. Over the last 18 months 18 referrals were received for the Didcot Life project but only four were accommodated. A waiting list operated with up to 4 people waiting for accommodation at any one time.</p> <p>The demand from young people for supported housing is consistently higher than the availability of rooms. The Vineyard, Hagbournes and the Foyer all maintain a waiting list and prioritise applicants based upon their support needs. . http://www.southOxfordshire.gov.uk/sites/default/files/Joint%20Homelessness%20Strategy%202015.final_.pdf Life wishes to reach out to more young women by offering a community</p>

	<p>support service in addition to supported accommodation. This may be women on the waiting list for supported housing or tenants struggling to maintain tenancies in independent rented accommodation. Our partner landlord SOHA are keen for us to deliver this service to their tenants.</p> <p>As well as providing a support package to prepare young women for independence, the support also helps tackle or prevent Child Sexual Exploitation and other forms of abuse. Young unsupported mothers are particularly at risk of exploitation because of their low self-esteem, fragmented family networks and exposure to chaotic lifestyles. Life's intervention builds their confidence and resilience to protect themselves or to help them recover after they have suffered abuse. This is still a very real problem in Oxfordshire; in 2015 the Kingfisher team were working with 70 children, had identified over 100 potential offenders and 373 children at risk across the county (OSCB Stocktake report 2015) http://www.oscb.org.uk/wp-content/uploads/Stocktake-report1.pdf</p> <p>3 years ago Life and South Oxfordshire District Council co-produced a set of outcomes to deliver which are in line with their strategic aims:-</p> <ul style="list-style-type: none"> • number of young mothers and their babies from disadvantaged backgrounds that have a better start in life • helping them to achieve economic well-being and more options for their own futures, • number of young families that are better informed about how to improve the health of themselves and their baby and how to access benefits. <p>These outcomes are monitored annually to ensure the service is strategically relevant and fit for purpose.</p>
<p>Why is your service the best solution to meet this need?</p>	<p>Life's supported accommodation provide a safe environment for young women to live and achieve positive outcomes. Tenants engage well within the service due to support staff being able to work intensively with them offering support packages which are tailored to each of the tenant's individual needs. They are able to build trust with well-trained support staff who are consistent and non-judgemental enabling them to speak openly so that the root of their issues can be addressed. They often have complex support needs ranging from debt issues and inability to manage money to poor health or mistrust of statutory authorities preventing them from accessing universal services that will make a difference to them and their babies. We help breakdown these barriers, provide a Young Parenthood Programme and specific learning through targeted information as well as running group sessions with partners. Our model enables the signs of poor mental health or parenting issues to be observed so that help can be sourced early before the situation becomes critical. The presence of an onsite support worker means that Child In Need plans can be implemented more effectively and integrated with other holistic support.</p>
<p>Who will benefit from your service? (The range of groups/people who will benefit, including numbers where possible)</p>	<p>Life provides support to 3-4 young mothers and their children per year who are vulnerable and often excluded from society. This will increase to 6 – 8 young mothers as we increase support in the community and grow the supported accommodation. We enable young mothers to gain the skills that are needed to live independently within a local community, therefore reducing repeated homelessness and preventing social exclusion. The support can also benefit extended families and friends of the young mother who may also have vulnerabilities and can have a positive impact on peer groups. The project will provide a better start in life for the children and lead to better outcomes in their development and educational attainment. The project will require the input of local volunteers, some from local businesses, and so will benefit the local economy and help towards community cohesion. The service will also benefit health and social work professionals and voluntary sector partners by reinforcing advice on wellbeing given to young mothers and the general safeguarding</p>

	of children and vulnerable adults through early detection or monitoring of child protection interventions.
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Applicant's financial forecast - LIFE 2009

Balance at start of year (A) (include savings and reserves in this figure)		£0	£0	£0	£0	£0
Expenditure		2016/17	2017/18	2018/19	2019/20	2020-21
Staff costs	Staff costs	21,440	£25,761	£24,611	£23,485	£22,349
	Training and development (all staff and volunteers)	£148	£120	£120	£120	£120
	Expenses	£264	£990	£1,003	£1,016	£1,030
	Agency fees and other related employment costs	987	£519	£469	£420	£371
	On Call	135	135	135	135	135
Building costs	Rent/mortgage	£6,567	£6,568	£6,732	£6,900	£7,073
	Business rates	£1,707	£1,645	£1,686	£1,728	£1,771
	Gas	£864	£1,044	£1,085	£1,082	£1,089
	Water	£0	£624	£650	£675	£700
	Electricity	£1,296	£1,000	£1,000	£1,000	£1,000
	Void/bad debts allowance	£2,546	£2,989	£3,038	£3,069	£3,100
Services	Total					
	Waste collection/disposal	£0	£0	£0	£0	£0
	TV license/packages	£146	£160	£160	£160	£160
	Wi-Fi/broadband	£720	£720	£720	£720	£720
	Phone Line	£288	£161	£165	£169	£174
	Building maintenance	£750	£909	£932	£955	£979
	Cleaning	£260	£845	£866	£888	£910
	Alarm/Emergency lighting maintenance, fire safety	£273	£272	£279	£286	£293
	Legal Costs for staff contracts etc	£0	£0	£0	£0	£0
	Window cleaning/land scaping	£845	£845	£866	£888	£910
	Supplies, equipment and consumables	Stationery and postage	£60	£67	£70	£72
ICT development		£0	£0	£0	£0	£0
Meetings costs (conference rooms, catering etc etc)		£0	£0	£0	£0	£0
Publicity and marketing (design, print and photocopying)		£180	£456	£467	£479	£491
Furniture, equipment and maintenance		£1,188	£4,540	£4,653	£4,768	£4,888
Life Skills & Young Parenthood Programme		£300	£1,360	£1,360	£1,360	£1,360
Professional costs	Building Insurance	£200	£203	£210	£217	£228
	Trustee Insurance	£0	£0	£0	£0	£0
	Public/Employee Liability & Personal Accident	£100	£100	£100	£100	£100
	Professional fees (accountants, legal, HR etc)	£250	£257	£263	£270	£277
Total Expenditure (B)	£41,514	£52,290	£51,640	£50,962	£50,303	
Income		2016/17	2017/18	2018/19	2019/20	2020-21
Generated income	Membership Subscriptions (if applicable)					
	Earned income (charity shops, fees for training etc - if applicable)					
	Contracted services from local authorities and other organisations					
	Income from rent	£30,088	£30,088	£30,389	£30,693	£31,000
	Income from service charges	£1,747	£1,747	£1,781	£1,817	£1,853
Donations, grants and fundraising	Grants from local councils, agencies, government bodies and/or EU	£9,679	£17,255	£17,041	£15,288	£15,091
	Grants from philanthropic foundations/organisations					
	Fundraising income from community / events		£2,200	£1,429	£2,164	£1,359
	Other donations - bequests		£1,000	£1,000	£1,000	£1,000
Other income	Income from interest on reserves, endowment funds etc					
Total Income (C)		£41,514	£52,290	£51,640	£50,962	£50,303
Balances at year end (i.e. line A - line B + line C)		£0	£0	£0	£0	£0

Applicant's project delivery/development plan - LIFE 2009

Operations Strategic Plan 2016/17

Key deliverables		Actions	Timescale	Who	Progress
Franchises	1	To design, draft, create, implement and manage an operational model of service delivery for Life Charity Regional Hubs utilising a 'Franchise' commissioning model			
	1.1	Produce PM hub service specifications (housing and outreach)	Sep 16	LL/MC	PM Outreach – second draft
	1.2	Produce LM hub service specification	Sep 16	AS	Complete
	1.3	Design performance management framework and reporting arrangements	Dec16	BR	
	1.4	Produce Head Office service specifications – HR, Finance, Fundraising, Communications, IT	March 17	VO'B, IN, DB, AS	
	1.5	Produce draft Staff Handbook	March 17	VO'B	
	1.6	Produce draft Operations Manual	March17	MC	
	1.7	Produce draft Hub Start Up Package	March 17	SS	
	1.8	Produce draft Franchise Agreement	June 17	SS	
	1.9	Consult on and finalise all documents	June 2017	Exec Team	
	2.	To oversee all existing operations as they transition into the Hub Franchise model			
	2.1	Recruit to Greater Birmingham hub posts	Oct 16	MC	Complete

	2.2	Induction and training for new post-holders	Nov 16	MC/BR	
	2.3	Training for Head Office service staff	Dec/Jan	MC/BR	
	3	Transitional staff plan detailing movements of staff as Regional Hub Model is implemented in accordance with operational assumptions detailed in the 5 year cash flow forecast			
	3.1	Draft and consult on future staffing plan	Jan17	MC	
	3.2	Implement plan	tbc	MC	
Pregnancy Matters	4	To design, draft, create, implement and manage the Pregnancy Matter™ online driven support service			
	4.1	Produce PM online service specification	Aug16	LL	Complete
	4.2	Review existing referral systems to ensure integration and improved web-based access	Nov 16	LL	
	4.3	Review existing volunteer counselling and skilled listening resources and clarify future roles	May 17	LL	
	4.4	Agree PM hub Year 1 delivery plan	Jan 17	BR	
	5	To oversee the transition of the Housing and Care teams into the Pregnancy Matters™ team			
	5.1	Revise and consult on new job descriptions	Oct 16	VO'B	Consultation underway
	5.2	Implement revised JDs	Nov 16	MC	
	5.3	Training plan	Dec 16	MC	

	5.4	Roll out structured supervision facility for all support workers	Dec16	EP	
	5.5	Produce Service Directory – skills sets, national/local referral agencies, partners	Dec 16	LL/BR	
	6	Provision of all staff involvement in online support service, following training and aptitude assessment			
	6.1	Identify job roles for staff and volunteers	Sep 16 onwards	LL	
	6.2	Recruit and deliver training programme for Helpline operators		LL/EP	
8	7	To oversee the implementation of an effective volunteer strategy			
	7.1	Produce range of volunteer job descriptions and opportunities		VO'B	
	7.2	Design and implement training and reward programmes for volunteers	Nov/Dec 16	VO'B	
	7.3	Deliver volunteer management training for hub staff, shop managers and relevant HO staff		VO'B	
Compliance, policy & procedures, systems	8	To ensure policy & procedure is relevant, fit for purpose, compliant with relevant legislation and embedded in the organization			
	8.1	Review suite of support services polices and documents to reflect integrated PM service		SB/EP	
	8.2	Produce move on policy	Nov 16	SB	
	8.3	Full review of policy and procedure to fit with	Jan 2017	MC	

		Regional Hub model			
	8.4	Review of staff induction plan	Feb 2017	MC	
	8.5	Consolidation of asset management database (leases/premises information)	Jan 17	ET	Complete
	9	To ensure operational systems i.e. HR, H&S, Supporting People Manager etc are implemented, embedded and where necessary training provided to staff members			
	9.1	Implement HR Online system	Oct 16	VO'B	
	9.2	Review Call handling and Text to Talk contracts to ensure VFM and incorporation of requirements of PM Online specification.	Sept 16	LL/EP	
	9.3	Review SPM against PM hub service specification.	Nov16		
	9.4	Review and identify fit for purpose H&S system	March 17	ET	
	10	To ensure compliance with all relevant operational standards, legislation and best practice including compliance with the Homes & Communities Agency as a Registered Provider and commissioners of support contracts			
	10.1	Carry out safeguarding self-assessment	Sept 16	LS	Complete
	10.2	Complete Safeguarding Training and Action Plan implementation	March 17	EP	
	10.3	Remodel services to retain support contracts or tender and implement new contracts	Nov 16	TN	

		<ul style="list-style-type: none"> • Slough high needs service • Bucks new contract • West Sussex review/tender 	Feb 17 Dec16	SB TN	
Quality assurance	11	Lead on PQASSO or other quality assurance system			
	11.1	Implement Quality Assurance Committee	July 16	MC	Complete
	11.2	Publish QAC workplan	Oct 16	MC	Complete
	11.3	Remodel On Call service to achieve value for money	Jan 17	SB	
Monitoring & evaluation	12	Departmental monitoring and evaluation to be devised in liaison with other Executive Team Members			
	12.1	Design and implement performance management frameworks for PM, HR, H&S	Nov 16	LL, ET, VO'B	
	12.2	Implement complaints monitoring framework	March 2017	MC	
	12.3	Carry out 6 months review of Greater Birmingham hub	April 2017	BR	
General	13	<p>To have oversight and management of the Administrative, HR & Volunteers (from Jan 2017) , H&S, Safeguarding and Pregnancy Matters team</p> <p>Lead on production of tenders for new and existing services.</p> <p>Departmental responsibility for all staff personal development plans and training</p> <p>Responsible for Life Groups Regions managed by you and your direct line reports</p> <p>Ensure effective liaison with Executive Team Members to maintain 'joined up thinking' and consistency of reporting</p>			
Specific	14				

projects	14.1	Implement improvement works and develop tenancy services and future management proposal for Addiscombe CHA project	June 17	ET	
	14.2	Implement Pre-tenancy Skills qualification		SL	
	14.3	Implement Young Parenthood Programme	Feb 17	SB	
	14.4	Establish/expand Taunton and Doncaster services	Mar 17/Dec 16	LS/SB	
	14.5	Expand and remodel Didcot support service	Dec 16	LS	