



STRATEGIC PLAN 2016-2019



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TOE2 STRATEGIC PLAN

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INTRODUCTION

1. OUR VISION

TOE2's vision is to be the key independent environmental funder for Oxfordshire. We aim to attract new sources of funding into the county to support strategic priorities and local community initiatives, to improve quality of life, the environment and the local economy.

2. OUR PURPOSE

TOE2 was established in 2011 as an environmental funder for Oxfordshire, based on the Community Foundation model. Building on the reputation of its predecessor (TOE), TOE2 has built upon existing networks and processes to distribute funds from Grunton Waste Management through the Landfill Communities Fund and continues to develop additional income streams from a range of sources.

With ever increasing pressures being placed on Oxfordshire's environment, there is a need for a proactive funder to help initiate and develop strategic projects by working collaboratively with partners while also supporting grass roots community projects delivering at the local level.

Areas of support

TOE2 directs funds into three key funding areas:

- The **biodiversity** of Oxfordshire's wildlife habitats
- **Access** to the local countryside and green spaces
- **The Low Carbon Agenda**

TOE2's funding guidelines are closely matched to agreed priorities in these three areas in Oxfordshire, eg; the County's Biodiversity Action Plan, with funds being directed to the delivery of projects at community level as well as to larger scale programmes. Education and raising environmental awareness are seen as key across all three funding areas.

Partnership working

There are many active environment groups and networks working across Oxfordshire. They make a real difference to the county's green spaces and environmental performance and raise significant funds from a wide range of sources, both locally and from national funders. TOE2's role is to seek out new and additional sources of funding, to make grants to high quality projects and to develop strategic projects with partners, helping to increase the effectiveness and range of environmental improvements across the county. TOE2 sees its key role as being the independent fund seeker and grant maker, with strategic programmes being mainly delivered by partner organisations.

Local Enterprise Partnership (LEP) - Oxfordshire's Strategic Economic Plan

Oxfordshire faces many pressures that will impact upon all aspects of its environment and economy. The county's Strategic Economic Plan outlines plans for housing and infrastructure developments that without careful planning and delivery will have enormous and potentially negative impacts throughout the county, placing increasing pressures on the natural and built environment and increasing our use of resources. TOE2 is inputting to the LEP's discussions and to the SEP Refresh (2016); there are opportunities for working collaboratively and for attracting government and European funding (EUSIF and ERDF) to support the delivery of strategic objectives, such as increasing the use of woodfuel, making carbon savings, improving access routes and support for leisure and

tourism. These areas of environmental support will have an economic, social and environmental benefit.

3. ORGANISATIONAL STRUCTURE

TOE2 is

- A not-for-profit limited company registered in the name of the Trust for Oxfordshire's Environment (TOE2) Ltd, company number 7492087.
- An Environmental Body (137171) registered with ENTRUST, allowing it to distribute funding through the Landfill Communities Fund.
- A registered charity (1140563)

TOE2 has the following structure:

- Voluntary Board of trustees
- Voluntary Grants panel which considers funding applications and makes recommendations to the board.
- Voluntary assessors, who provide expert advice on funding applications
- The small staff team includes a Director and an Administrator.
- The TOE2 chairman commits a great deal of time to developing and supporting TOE2 in a voluntary capacity.

Organisational Costs

TOE2 offers good value for money, with overheads kept within reasonable limits. Appendix 1 shows the core costs for the first 5 years of operation, averaging 14.95% of total expenditure. The Trust runs on the basis of full cost recovery and relies heavily on the commitment of the chairman.

Running costs for 2015-2016 were £34,242 comprising

- Employment of a part time Director (3 days a week)
- Employment of an administrator (1 day a week)
- Support costs including rental of office space at Earth Trust, computer support, general office costs, and expenses (travel, meeting costs).
- Additional costs include insurance, audit, assessor expenses, website, PR and fund raising.
- The Board has agreed to work towards setting aside a reserve of six months running costs

The percentage levied on income streams is between 10% and 20%, depending on the anticipated support and resources necessary to ensure successful programme delivery and allocation of funds.

4. ACHIEVEMENTS OVER THE FIVE YEARS TO 31 March 2016

- Brought in funds totalling £1,153,534 from a wide range of sources (see supporting information)
- Awarded over £966,853 through the general grant fund and strategic programmes (see supporting information).
- Developed funding programmes with partners (Oxfordshire Woodfuel Programme, ENRICH, Church Energy audits) which are making a real impact on Oxfordshire's environment and generating interest from outside the county. See Appendix 1 and Appendix 3.
- Established a reputation as a reliable Oxfordshire funder, with high awareness among local communities, the environment sector, Local Authorities and other funding bodies
- Working at a strategic level within Oxfordshire (LEP, Local Nature Partnership, Environmental Leaders Group, Oxfordshire Forestry Accord)
- Established a board and a grants panel with an impressive array of expertise
- Delivered results whilst keeping overhead and administration costs within reasonable parameters
- Worked collaboratively with many key organisations within Oxfordshire

- Encouraged collaboration within Oxfordshire's environment sector
- Raised awareness, interest and investment in woodfuels through the Oxfordshire Woodfuel Programme
- TOE2 is unique as a county based environmental funder and other counties have expressed interest in replicating what we do.
- Established a website with twitter feed.

STRATEGY 2016 - 2019

TO WORK TOWARDS OUR PURPOSE TOE2 WILL:

- Secure and channel new sources of sustainable funding for the benefit of Oxfordshire's environment, its existing environmental organisations and local communities
- Support good quality projects at the local level which reflect the county's strategic priorities
- Develop broader strategic programmes with partners and hold/channel funds on behalf of funders and delivery partners
- Continue to raise the profile of Oxfordshire's rich and diverse environment and its significance to the local economy

WE WILL DELIVER THIS BY:

1. Establishing and building a designated Environment Fund for Oxfordshire
2. Identifying, negotiating and developing income streams from a wide range of sources
3. Channelling funds to areas of identified need and strategic significance, and supporting community environmental initiatives by providing an effective funding mechanism
4. Developing effective partnerships that deliver against agreed strategic objectives
5. Inputting into county-wide discussions on biodiversity, access and the low carbon agenda
6. Widely promoting the need to conserve Oxfordshire's environment
7. Disseminating advice on best practice and celebrating innovation by local communities
8. Being an organisation fit for these purposes and with the capacity to grow

PRIORITIES FOR 2015-2018

1. **Position TOE2 as the key independent environmental funder for Oxfordshire**
2. **Establish sustainable longer term income** including setting up a designated Environment Fund for Oxfordshire
3. **To increase and develop the general grant fund**
 - Across all three funding areas, both in terms of level and diversity of income for allocation
 - To encourage and ensure high quality applications through clear guidance and project assessment.
 - The environment sector already attracts considerable funding in to the county; TOE2's role is to work collaboratively with local environmental organisations to increase the amount and diversity of funding available across the sector
4. **Diversify income streams** to include the following:
 - Engage with the corporate sector to provide sponsorship opportunities
 - Promoting TOE2 as an effective mechanism for distributing grant streams from a range of sources
 - To approach Charitable Trusts
 - Better partnership working with Landfill Communities Fund (LCF) funders

- S106 and Community Infrastructure Levy (CIL) funds, and biodiversity offsetting
- European and Government funding
- Signposting to other grant streams
- Develop and launch a Legacy campaign

5. Partnership Programmes

- Develop further programmes with a range of local partners, including programmes that have been on the “back burner” e.g. Training for biodiversity volunteers

6. Organisational effectiveness

- Ensure core income is identified and secured to fund ongoing central costs
- Build a staff team capable of delivering against agreed areas of activity and development and viable on a real cost basis in the future
- Maintain the rigour with which project proposals are examined, and enhance procedures for evaluation and monitoring of completed projects
- Continue to improve the project management processes to ensure smooth delivery and appropriate PR for funders
- Collect statistics for projects funded, in order to be able to benchmark each year’s achievements and so monitor activity against target outcomes
- Develop and maintain the website to ensure it becomes an effective mechanism for generating interest in Oxfordshire’s environment and that it is current, interactive, and informative for grant seekers, reflecting TOE2’s links within the county and making effective use of social media.
- Develop a more robust communications strategy to encourage high quality project applications and to raise TOE2’s profile across the county.
- Develop the capacity for easily processed on-line applications through the website
- Continually review Programmes to ensure areas of agreed strategic priority within Oxfordshire are supported
- Regularly review Governance to ensure the skills of the board reflect areas of organisational delivery and development, providing training when required.
- Continue to develop strong relationships with organisations in Oxfordshire
- We will collect information on funded projects in order to benchmark each year’s achievements and monitor activity against target outcomes

KEY MEASURABLE OBJECTIVES 2016 – 2019

FUNDING

1. We will seek to secure £1million for Oxfordshire’s Environment Fund
2. We will be the key independent environmental funder for Oxfordshire, increasing the value and diversity of income streams and working in close partnership with the county’s environment sector, Local Authorities and other decision makers
3. We will aim to reach and maintain a minimum level of £100,000 of general grant funding for allocation at each quarterly grant panel meeting, with funds from a range of sources
4. We will develop a three year funding relationship with a key corporate sponsor
5. We will encourage and enable greater support from the corporate sector
6. We will have a balanced income profile and adequate reserves to fund development
7. We will establish a Legacy Campaign

ORGANISATIONAL DEVELOPMENT

1. We will aim to recruit a full time Chief Executive and continue to develop staff and staff capacity in line with our needs to maintain effective working whilst constraining cost levels

2. We will increase the administrative support as required to ensure smooth running and development of the Trust
3. Recruitment of a Strategic development and fundraising director?
4. Fundraising and communications are key activities; we will continue to use effective approaches to obtaining these services
5. We will work in close partnership with other Oxfordshire environmental organisations, to ensure that areas of strategic priority benefit from ongoing and sustainable support
6. We will encourage a greater understanding of the natural environment within communities
7. We will operate to best practice and to appropriate environmental standards
8. We will increase awareness of TOE2 among the public and the environment sector and work to a clear Communications Plan

PROGRAMMES

1. The **ENRICH Programme** has been working to ensure greater impact of the energy demand reduction message to the wider community. The programme was funded over a four year period and will close at the end of 2016. TOE2 continues to support community buildings to become more energy efficient and to increase awareness of the need to reduce energy demand. **Church Energy Programme** will be developed with a range of partners, and be inclusive of ALL faith buildings and communities in Oxfordshire
2. The **Oxfordshire Woodfuel Programme** (now the Oxfordshire Forestry Strategy) will strengthen its relationship with delivery partners, will continue to raise the level of awareness of local wood fuel, increase the number of woodlands that are actively managed, help to increase woodland coverage, promote the OxLogs standard, and help to achieve five new biomass installations per annum. The During 2017, the TOE2 developed programme will be delivered within the broader context of the recently agreed Oxfordshire Forestry Strategy.
3. We will work in partnership to develop a programme to enable Oxfordshire's environmental organisations to provide co-ordinated **Biodiversity Training for Volunteers**, and to establish a scheme for environmental mentors
4. We will develop a partnership programme to provide **Access Training for Volunteers** to encourage best practice for access projects, to open up, maintain and improve the network of Oxfordshire's footpaths
5. We will work in partnership with the **AONB's** to develop a programme to support specific projects within the Cotswolds, North Wessex Downs and the Chilterns
6. We will work in partnership with the Earth Trust to develop a countywide programme **Connecting Oxfordshire People with Nature** supported by Whittard of Chelsea
7. We will work in partnership with Brakspears to provide a series of circular walks from Brakspears pubs and to support access improvements to the rights of way network

TARGET OUTCOMES AND OUTPUTS

Operational

- To raise the profile of TOE2 through the website, effective use of the media and through county networks such as TVERC, Wild Oxfordshire, CAG groups and others.
- To attract at least 15 good quality funding applications to each quarterly grant panel meeting, with a spread across all 3 funding areas.
- Increase the number and range of NGOs and community groups engaged.
- Use the TOE2 website and publications as an effective and informative resource for community groups; monitoring use of the website.
- Ensure coverage across the whole county and reaching as wide a cross section of society as possible by monitoring where funds are allocated
- To increase the number of volunteers involved as assessors and grant panel members

- To consider opportunities for involving volunteers, including student volunteers, in other areas of TOE2's work.
- To set up a process to monitor the ongoing management of TOE2 funded projects

Biodiversity

- Support projects that are priority habitats in the State of Oxfordshire Report (published Spring 2017)
- Contribute towards the improvement in the quality of local habitats, with particular focus on BAP priority habitats as listed under S41 of the NERC Act.
- To support at least 10 projects each year that target Oxfordshire priority species as listed under S41 of the NERC Act, eg; through habitat improvement and nest site provision, and improve conditions for them
- To support 10 projects each year that improve the management of local wildlife sites

Low Carbon Agenda

- 100% of audited community buildings acting on at least one energy audit recommendation within 2 years of the date of the audit
- 300 tonnes of carbon saved annually through energy efficiency improvements in community buildings.
- Increase the use of Oxfordshire's community buildings by increasing energy efficiency and reducing running costs
- Increase the use of locally derived woodfuel through the development of the Oxfordshire Forestry Strategy
- Support 10 projects that enable and encourage local food production within the plan period

Access

- To increase accessibility of 50 miles of footpaths through surface improvements and replacing stiles with gates, in particular to strategic routes
- To increase awareness of the location of local rights of way and of circular routes
- To promote rights of way and signpost to other organisations websites, such as Chilterns Society and the Ramblers

Across all funding areas

Throughout its activities TOE2 aims to play a part in the following:

- Engaging more people with the natural environment through accessing and enjoying green spaces
- Increasing understanding of the value and importance of Oxfordshire's countryside and green spaces
- Increasing knowledge and expertise of groups and individuals involved with the environment sector in Oxfordshire

SUPPORTING INFORMATION

ALLOCATION OF FUNDING

GRANT AND PROGRAMME ALLOCATION 2011-2016						
SOURCE	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	Total
General grant allocation - Biodiversity projects	£20,562.00	£32,874.00	£65,032.00	£39,323.00	£87,556.00	£245,347.00
General grant allocation - Access Projects	£16,120.00	£40,188.00	£42,468.00	£24,546.00	£48,190.00	£171,512.00
General grant allocation - Energy Efficiency and Renewables	£17,116.00	£53,639.00	£83,330.00	£77,500.00	£94,512.00	£326,097.00
ENRICH Programme energy audits and support		£16,000.00	£42,680.00	£39,880.00	£30,000.00	£128,560.00
Woodfuels Programme/Forestry Accord		£12,728.00	£20,612.00	£18,254.00	£13,683.00	£65,277.00
Energy Efficiency Blog		£2,250.00				£2,250.00
Church Energy Audits			£12,960.00	£850.00		£13,810.00
Connecting people with nature (Earth Trust)				£7,000.00	£7,000.00	£14,000.00
SUB-TOTALS	£53,798.00	£157,679.00	£267,082.00	£207,353.00	£280,941.00	£966,853.00
CORE COSTS						
	£27,397.00	£28,659.00	£32,599.00	£47,183.00	£34,242.00	£170,080.00

INCOME

INCOME 2011-2016						
SOURCE	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	
Grundon	£103,493.00	£130,000.00	£166,500.00	£159,292.00		£181,900.00
OCC Environment fund		£10,000.00	£10,000.00	£10,000.00		
Funds for TPF initiative	£12,000.00		£10,000.00	£10,000.00		
Patsy Wood Trust (ENRICH)	£20,000.00	£38,616.00	£12,500.00	£49,850.00		£30,000.00
Patsy Wood Trust (Church Energy Audits)			£9,000.00			
Laing Charitable Trust (Church Energy)			£8,000.00			
Charlie Laing donation (Church Energy)		£2,000.00				
OCC	£945.00					£20,000.00
Towergate (grant)	£250.00					
Anonymous grant	£13,000.00					
Donations		£9,275.00	£6,500.00	£3,000.00		£328.00
Donations and course fees for Woodfuel Programme			£420.00			£900.00
Esme Fairbairn (Woodfuel programme)		£25,000.00				
Forestry Commission (Woodfuel)		£5,000.00				£2,000.00
OCC for Woodfuel Programme			£50,000.00	£687.00		
OCC Access Fund	£8,800.00					
ORHP Fund	£1,375.00			£10,750.00		
Oxon Community Foundation (Energy Efficiency Blog)		£2,500.00				
Towergate Insurance (Stairway to Nature)		£2,500.00				
Interest	£59.00	£180.00	£289.00	£117.00		£957.00
Whittard Trading				£15,551.00		
Eco-innovation grant						£1,452.00
S106 funding						£11,675.00
SUB-TOTALS	£159,922.00	£225,071.00	£273,209.00	£259,247.00		£236,085.00
TOTAL	£1,153,534.00					

INFORMATION ON INCOME AND FUNDED PROJECTS 2011-2015

Fig. 1 Total TOE2 income in £, years 2011-12 to 2014-15

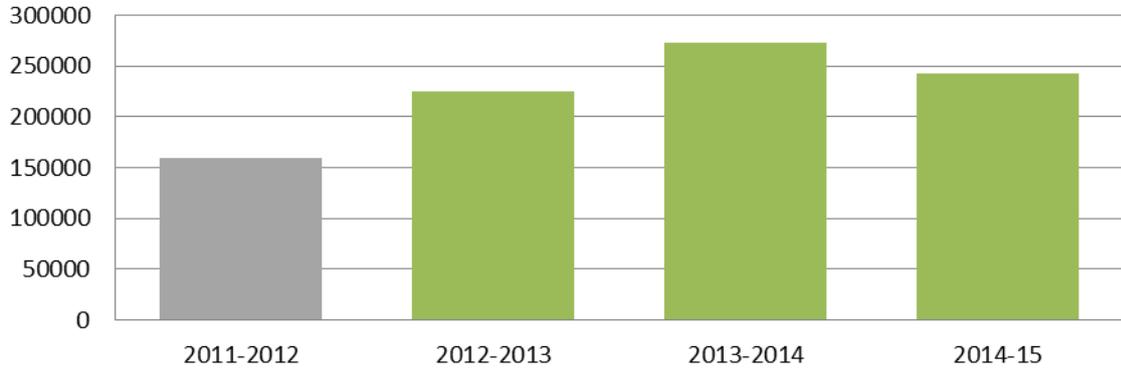


Fig. 2 Annual distribution of funding across three objective areas, 2011-12 to 2014-15

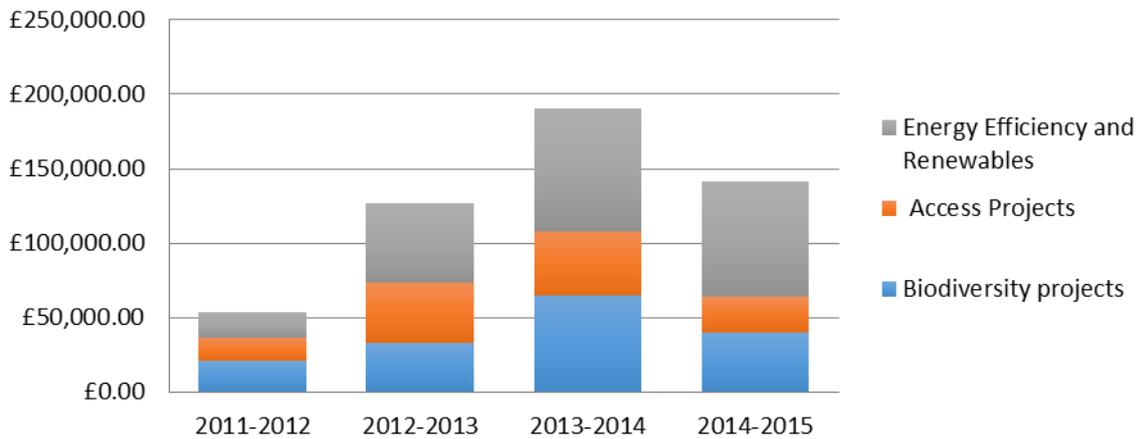


Fig. 3 TOE2 supported projects 2014-15, breakdown by objective. Total awarded: £141,369

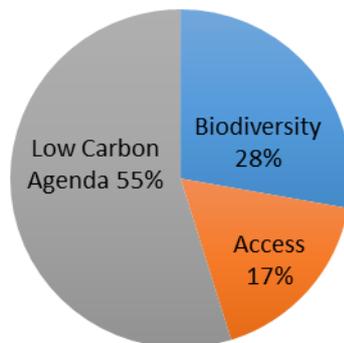
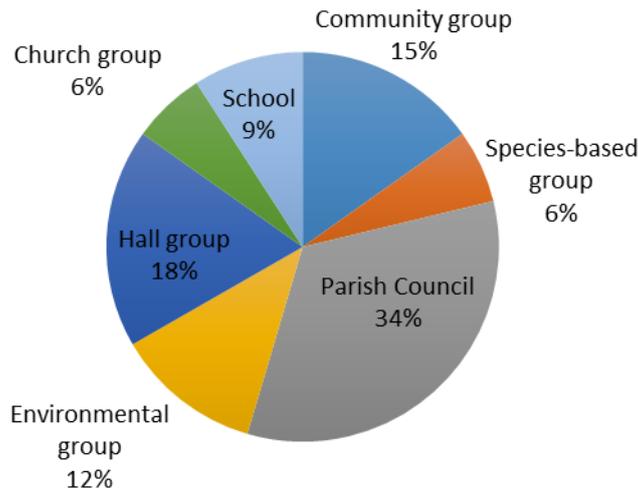


Fig. 5 Breakdown of TOE2 funded projects by group type 2014-15



PARTNER ORGANISATIONS WORKING WITH TOE2 TO SUPPORT PROGRAMMES

PROGRAMME	FUNDERS	PARTNERS	FUTURE PLANS
Energy Reduction in Community Halls (ENRICH)	Patsy Wood Trust	<ul style="list-style-type: none"> Environmental Information Exchange (EIE) Oxford Brookes Community First Oxfordshire (CFO) 	Programme to wind up in early 2017. TOE2 will continue to fund energy efficiency in community buildings.
Church Energy Audit Programme (2013-2014)	Beatrice Laing Trust Patsy Wood Trust Charlie Laing	<ul style="list-style-type: none"> Diocese of Oxford Sustain Ltd 	This programme will be developed further during 2017
Oxfordshire Community Woodfuel Programme, now working as the Oxfordshire Forestry Programme	Esme Fairbairn Foundation Oxfordshire County Council Forestry Commission	<ul style="list-style-type: none"> Oxfordshire County Council Sylva Foundation Forestry Commission Woodland Trust West Oxfordshire District Council Wild Oxfordshire AONBs 	Funds to be sought for the delivery of plans and priorities outlined in "In A Nutshell", a strategy document for Oxfordshire's forestry sector
Connecting people in Oxfordshire with the natural environment	Whittard of Chelsea	<ul style="list-style-type: none"> Earth Trust 	Events scheduled during 2017
Brakspear Pub Trails – creating circular trails from pubs in South Oxfordshire	Brakspear	<ul style="list-style-type: none"> South Chilterns Path Maintenance Volunteers Other local volunteers 	Funds to be made available for access improvements