



CHARITY COMMISSION
FOR ENGLAND AND WALES

Trustees' Annual Report for the period

From **Chris Mitchell Chair of Trustees**

Period

09/08/2020 to 31/03/2021

Charity name: STEPWAY CIO

Charity registration number: 1186465

Objectives and Activities

	SORP reference	
Summary of the purposes of the charity as set out in its governing document	Para 1.17	TO PROMOTE SOCIAL INCLUSION AMONG VETERANS OF THE ARMED FORCES LIVING IN ENGLAND & WALES FOR THE PUBLIC BENEFIT BY PREVENTING THEM FROM BECOMING SOCIALLY EXCLUDED, RELIEVING THE NEEDS OF THOSE WHO ARE SOCIALLY EXCLUDED AND ASSISTING THEM TO INTEGRATE INTO SOCIETY THROUGH THE PROVISION OF A 7 STEP CIVILIAN SKILLS PROGRAM TO HELP WITH ADAPTION INTO CIVILIAN LIFE, MENTAL HEALTH AND EMPLOYMENT.
Summary of the main activities in relation to those purposes for the public benefit, in particular, the activities, projects or services identified in the accounts.	Para 1.17 and 1.19	Provision of three main services. <ul style="list-style-type: none">• 7-step civilian skills program• Drop-in centres• Outdoor community projects Veteran HUB based in Worcester covering Worcestershire
Statement confirming whether the trustees have had regard to the guidance issued by the Charity Commission on public benefit	Para 1.18	The Trustees of STEPWAY CIO have had regard to the guidance issued by the Charity Commission on public benefit.

Additional information (optional)

You may choose to include further statements where relevant about:

	SORP reference	
Policy on grant making	Para 1.38	NA
		NA

Policy on social investment including program related investment	Para 1.38	
Contribution made by volunteers	Para 1.38	NA
Other		NA

Achievements and Performance

	SORP reference	
Summary of the main achievements of the charity, identifying the difference the charity's work has made to the circumstances of its beneficiaries and any wider benefits to society as a whole.	Para 1.20	<p>The key achievements of the Charity during the reporting period are:</p> <ul style="list-style-type: none"> • Delivery of 3 x 7 Step civilian skills program throughout Worcestershire in several different areas. Improving lives of over 65 Veterans and their families • Running of the Veteran Community Day where other organisations can take part and showcase their services to the veteran community. First one took place in Worcester. One in the West Midlands is taking place on 15th October 2021. • Opening of a Veteran's Wellbeing Centre in Oldbury. <ul style="list-style-type: none"> ◦ Community Project ◦ Veteran's Hub ◦ Therapy unit where partner charities can see their clients for free. • Opening of a Veteran's hub in Worcester <ul style="list-style-type: none"> ◦ Outdoor Community Project • Award of silver employment recognition from the Armed Forces Covenant <p>Veterans within Worcestershire and the West Midlands have benefitted from the services provided by STEPWAY. We have</p>

		<p>seen a significant uptake in attendance at our community project and feedback from those veterans attending is that the activity has been extremely helpful in dealing with a number of PTSD related issues, isolation and adaption into civilian life.</p>

Additional information (optional)

You may choose to include further statements where relevant about:

Achievements against objectives set	Para 1.41	<ul style="list-style-type: none"> • Opening of the Veterans Hub • Delivery of the 7-step civilian skills program • Opening of Wellbeing Centre - Oldbury • Delivery of Veteran's Community Days • Outdoor community projects • Award of Silver employment recognition from the Armed Forces Covenant
Performance of fundraising activities against objectives set	Para 1.41	<p>Covid 19 has had an impact upon our fundraising targets, however, the Charity has been able to generate £707 through our fundraising activities and remains</p>

		sustainable going into 2022.
Investment performance against objectives	Para 1.41	Not Applicable. As a new Charity, STEPWAY does not have reserves available for investment at this stage.
Other		Not Applicable

Financial Review

Review of the charity's financial position at the end of the period	Para 1.21	See attached financial report
Statement explaining the policy for holding reserves stating why they are held	Para 1.22	Not applicable at this stage of the Charities life. A policy on reserves will be developed by our Trustee with responsibility for Finance during 2022.
Amount of reserves held	Para 1.22	N/A
Reasons for holding zero reserves	Para 1.22	N/A
Details of fund materially in deficit	Para 1.24	Nil
Explanation of any uncertainties about the charity continuing as a going concern	Para 1.23	Not Applicable

Additional information (optional)

You may choose to include further statements where relevant about:

The charity's principal sources of funds (including any fundraising)	Para 1.47	The Armed Forces Covenant Trust Fund Local Councils Heart of England community foundation European Social Funding Local businesses (Donations) Online fundraising through Just Giving
Investment policy and objectives including any social investment policy adopted	Para 1.46	We currently have no investment policy due to the limited time of operation.
A description of the principal risks facing the charity	Para 1.46	Further impacts of Covid 19 Loss of AFC Funding
Other		Growing too quickly

Structure, Governance and Management

Description of charity's trusts:		CIO
Type of governing document (trust deed, royal charter)	Para 1.25	The 'foundation' model (this model) is for charities whose only voting members will be the charity trustees
How is the charity constituted? (e.g unincorporated association, CIO)	Para 1.25	CIO
Trustee selection methods including details of any constitutional provisions e.g. election to post or name of any person or body entitled to appoint one or more trustees	Para 1.25	Trustees are selected by agreement with the existing trustees, CEO and Operation Director.

Additional information (optional)

You may choose to include further statements where relevant about:

Policies and procedures adopted for the induction and training of trustees	Para 1.51	In-house training provided to cover financial controls policy, Fundraising policy, Data protection, health and Safety. The full list of policies can be found on www.stepway.org Professional Indemnity insurance policy. Managing Performance /Capability Policy are also in place. Trustees receive an in-brief/training session from the Chair and CEO. They are also encouraged to attend the 7 Step civilian skills program to familiarise themselves with the aims of the charity. Moreover, A handbook for employees and volunteers is provided which includes all policies and procedures.
The charity's organisational structure and any wider network with which the charity works	Para 1.51	Trustees Board, CEO and Operations Director. Work closely with Armed Forces Covenant Team at County Council and City Council, sit on the AFC Committee. In partnership with the Salvation Army who we operate out of their buildings in Oldbury.
Relationship with any related parties	Para 1.51	N/A

Other		
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Reference and Administrative details

Charity name	STEPWAY CIO
Other name the charity uses	N/A
Registered charity number	1186465
Charity's principal address	STEPWAY CIO The Trinity Worcester WR1 2PN

Names of the charity trustees who manage the charity

	Trustee name	Office (if any)	Dates acted if not for whole year	Name of person (or body) entitled to appoint trustee (if any)
1	Christopher Mitchell	Chair	Whole Year	Board of Trustees
2	James Stanley	Trustee	Whole Year	N/A
3	Kevin Gale	Trustee	Whole Year	N/A
4	David Carney	Finance	Whole Year	N/A
5	Michael O'Connell	Trustee	Whole Year	N/A
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Corporate trustees - names of the directors at the date the report was approved

Director name		

Name of trustees holding title to property belonging to the charity

Trustee name	Dates acted if not for whole year	

Funds held as custodian trustees on behalf of others

Description of the assets held in this capacity	
Name and objects of the charity on whose behalf the assets are held and how this falls within the custodian charity's objects	
Details of arrangements for safe custody and segregation of such assets from the charity's own assets	

Additional information (optional)

Names and addresses of advisers (Optional information)

Type of adviser	Name	Address

Name of chief executive or names of senior staff members (Optional information)

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Exemptions from disclosure

Reason for non-disclosure of key personnel details

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Other optional information


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Declarations

The trustees declare that they have approved the trustees' report above.

Signed on behalf of the charity's trustees

Signature(s)

	
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Full name(s)

David Paul Carney

Position (eg
Secretary, Chair, etc)

Trustee and Accountant

Date

24/12/2021