



## **Oxford Poverty Action Trust Annual Report 2018**

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## 1 Chair's Report 2018

### The problem

On 21 December Oxford City Council announced that it estimated there are 94 people sleeping rough in the City of Oxford, and 119 sleeping rough in the county of Oxfordshire. According to my memory this is more than three times the number of rough sleepers there were in the city in 2010. There are certainly many more homeless or vulnerably housed people than that in Oxford, if one includes people living in hostels, or short term 'move-on' accommodation, or sofa surfing with friends and family, but there don't seem to be reliable estimates for all those. It seems fairly clear that the cost of housing, particularly in the city, is a prime cause of homelessness. Anecdotal evidence says that some of the people sleeping rough or in night shelters are working, but still can't afford a home.

### The OxPAT Response

Since 1996 the Oxford Poverty Action Trust (OxPAT) has existed to provide a mechanism for concerned citizens and organisations to help homeless or vulnerably housed people in the city. We do that by soliciting donations which we then pass to other local charities who we perceive to be doing good work to help the homeless. OxPAT has no staff or premises and very few costs. For example in 2018, excluding the cost of buying Christmas cards, which we sell for a profit, we had less than £100 of other costs, which is about 0.2 % of the £61,000 we gave to charity.

It is very difficult when you see a homeless person on the street to know how best to help. Surveys show that over 70 % of money donated directly to the homeless will be spent on drink or drugs. Giving money to OxPAT means that your donation will be channelled through professional charities with the resources to understand the problems a homeless person is suffering with, and develop a plan to help the person address those problems. The OxPAT money will be spent by the charity involved on items or activities which will directly benefit an individual or individuals. Typically it will be spent on shelter, food, clothing, advice, medical care, and training to help people get a job, or manage their finances better.

Since OxPAT began in the late 1990s, we have raised nearly £500,000. Money comes to us partly from collection boxes, partly from fund-raising events, but mostly from concerned citizens giving regularly by Gift-Aided bankers' orders, and generous local firms and colleges.

### Activities in 2018

During January and February 2018 we solicited applications from local charities to be one of our partners or core agencies, through which the bulk of our money is spent. Having evaluated the applications, we chose to support the agencies listed in section 5 Partners for the period March 2018 – February 2019.

These charities cover a full range of support services for homeless people from helping those sleeping on the streets, to providing shelter in day centres and hostels, mental care, rehabilitation, and training and skills development to help them find employment.

We performed fund-raising activities during the year, by collecting for money on land belonging to Christchurch College during the summer eight weeks. Around Christmas the children of St Barnabas school sang carols for us at the Westgate centre while we collected money, and a choir from Appleton sang carols for us at the railway station, courtesy of First Great Western.

Once again John Somerscales very kindly designed a Christmas card for us which we sold to raise money.

The most significant fund raising though occurred when Oxfordshire Community Foundation (OCF) approached us with an offer to match any money we raised between 10 December 2018 to 6 January 2019, up to a value of £50,000. Largely thanks to their publicity campaign, helped by the city council, we eventually raised £42,833.13 which was matched by OCF, making a total of over £85,000 raised. We really would like to thank everybody who helped with that, including the charities we

support, but especially the hundreds of people who so generously gave their money to make it possible.

## 2 Legal Details

### Trust

The object of the Trust is “for the relief of the effects of poverty, sickness, disablement and old-age” in accordance with a Trust Deed made on 28th June 1998. The Trust has been granted registration as a charity by the Charity Commissioners. The Charity Number is 1070645. The Inland Revenue has accepted the Trust as a charity within the definition of section 506 (1) Income and Corporation Taxes Act 1998, as a result of which the Trust’s income and gains are not taxable to the extent that they are applicable and applied to charitable purposes.

The registered address is 25 Woodstock Road, Oxford OX2 6HA.

During the calendar and accounting year 2018 the following persons acted as Trustees of the Oxford Poverty Action Trust (known as OxPAT) for some or all of the time:

Paul Armstrong  
Jerome Bertram  
Deborah Ceadel  
Jonathan Clark  
Ralph Hall  
Meg Movshon  
Patrick Mulvihill

Officers during the year 2018 were:

Chair: Jonathan Clark  
Secretary: Meg Movshon  
Treasurer: Paul Armstrong

The Patrons of the Trust are:

Rt Revd. William Kenney CP  
Mrs. Felicity Dick, Deputy Lieutenant of Oxfordshire

The Charity’s Bankers are:

The Co-operative Bank, King’s Valley, Yew Street, Stockport, Cheshire, SK4 2JU

The charity owns no functional property and there are no connected companies.

### Changes to the Trustees and Committee

Jim Campbell and Nicola Josse joined the committee during 2018.

### Jonathan Clark, Chair, May 2019

### 3 Finance

#### OxPAT Financial Report for 2018 ( 01 January 2018 to 31 December 2018)

OxPAT Accounts (figures in £)	2017	2018
<i>Expenditure:</i>		
Admin and Special Purposes Sub-Accounts	202.00	99.31
Grants to Charities	30,092.00	61,008.00
Grants to Individuals	613.10	200.00
Christmas cards	1,166.40	1,980.00
<b>Total Expenditure</b>	<b>32,073.50</b>	<b>63,287.31</b>
<i>Income:</i>		
Boxes	1,313.86	1,571.55
Fund Raising	1,126.27	1,586.66
Organisations	9,955.13	16,770.96
Places of Worship	3,312.60	539.33
Private Donation (Gift Aid)	8,041.00	14,170.50
2016 Christmas cards	2,125.00	-
2017 Christmas cards	470.00	1,743.00
2018 Christmas cards	-	375.00
CAF donation <sup>1</sup>	*	19,201.98
Internet donations <sup>2</sup>	628.92	3,821.41
Other Private Donation (Non-Gift Aid)	5,261.58	3,728.89
Inland Revenue (Gift Aid Refund) <sup>3</sup>	137.54	421.25
Special events	200.00	275.00
Other	693.00	739.94
<b>Total Income</b>	<b>33,264.90</b>	<b>64,993.47</b>

\*Income received as donations through the Charities Aid Foundation (CAF) is reported separately in 2018, due to this becoming a larger and more important channel in this year. In 2017, income received as donations through CAF is included in the 'Other Private Donation (Non-Gift Aid)' row. <sup>1</sup>Includes CAF cheques and donations made via the CAF website. <sup>2</sup>Collected via online channels, with the exception of CAF, which is listed separately. <sup>3</sup>Collected via Charity Choice.

Reconciliation with bank	2017	2018
Opening balance	9,701.64	10,893.04
Income	33,264.90	64,993.47
Expenditure	32,073.40	63,287.31
<b>Closing balance</b>	<b>10,893.04</b>	<b>12,599.20</b>

#### Income

2018 has been a record year for OxPAT. Total income during 2018 was £64,993.47 compared with £33,264.90, in 2017. In the 20 years OxPAT has been operating, we have collected over £500,000 from our donors. The increase in income from 2017 to 2018 – an increase of £31,728.57, nearly double the income in 2017 - is primarily due to sizeable increase in donations in December 2018, due to the Oxfordshire Community Foundation (OCF) donation matching campaign. This

campaign provided a 1:1 match for donations made to OxPAT between 10 December 2018 and 6 January 2019, up to a limit of £50,000. During this time, we saw sizeable donations, in particular via CAF, as well as direct donations made by organisations and individuals. We would like to thank OCF for selecting OxPAT to receive matching funds, as well as the anonymous donor who provided the £50,000 funding for OCF.

Very generous donations from W Lucy and Co (included in income from organisations) in 2013-2018 have been used to establish an employment training fund for homeless and vulnerably housed people. We would like to thank Lucy's for continuing this fund with the top-up grant to this fund made during 2018.

Our income is spread across various categories of donors and donation channels. Box income increased from 2017 to 2018 by around £250. Fundraising income increased by around £450, reflecting collections held during Summer Eights Week, and during carol singing before Christmas. Income from organisations increased substantially by nearly £7,000, due to several large donations from colleges and corporate donors. Income from places of worship decreased by around £2,700 from 2017 to 2018 in part due to decreased donations from places of worship that regularly support OxPAT, and due to one-off donations made by places of worship in 2017. Gift Aid donations have increased by over £6,000 from 2017 due to new Gift Aid eligible standing orders as well as one-off donations, in particular made during the OCF matching funds campaign. Internet donations have increased by around £3,200 in part due to us registering with JustGiving, as well as general shift to increasing donations being made electronically. Gift Aid received in 2018 has been collected on eligible online donations made via CharityChoice. Gift aid for eligible donations made directly to our account and via cheque will be claimed in 2019. Special events income has remainder broadly similar to that in 2017. Other income records donations we have received anonymously directly into our bank account.

CAF donations are reported separately this year, as this is an increasingly important channel of funding for OxPAT, and since the OCF matching funds campaign encouraged donation via CAF - in previous years, these had been included in 'Other Private Donation (Non-Gift Aid)'. Comparing the £5,261.58 received in 2017 to the total of 'Other Private Donation (Non-Gift Aid)' and 'CAF donation' in 2018 of £22,930.87, indicates a four-fold increase in donations.

The 2018 Christmas card saw revenues of £375 in 2018; in line with previous years, the majority of revenue from the Christmas card sales come in during the first few months of the next calendar year. Hence, most revenue from the 2018 Christmas card will be collected in 2019. Overall, 2017 Christmas card sales brought in income of £2,213 across 2017 and 2018, leading to a profit of £1,223.00 for 2017 Christmas card sales.<sup>1</sup>

## Expenditure

The total grants made by OxPAT in 2018 amounted to £63,287.31, nearly all of which was donated as regular distributions to our core agencies, totalling £58,600. As mentioned above, the OCF matching funds campaign has driven an increase in donations, and consequently an increase in regular distributions made in 2018, to be around double that of 2017. A grant was also made from the Lucy's training fund to Steppin Stone totalling £2,408 (more details are included in Grants to Charities section above). Grants to individuals (paid via various charities) decreased by around £400, reflecting fewer applications for individual grants and only one individual grant being made in 2018.

Our costs for Christmas card printing was £1,980 in 2017, covering Christmas cards printed in 2017 and paid for at the start of 2018, as well as Christmas cards printed and paid for in 2018.

Our administrative and special purposes expenses in 2018 were purchasing insurance for cover the fundraising collection during Sumer Eights Week, totalling £99.31.

## Special purposes accounts

Within the totals above we keep track of two sub-accounts

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<sup>1</sup> As discussed in the expenses section, printing costs for 2017 Christmas cards were £990.

<b>Special purposes account</b>	<b>2017</b>	<b>2018</b>
Opening balance	1,000.00	840.00
Income	-	-
Expenditure	160.00	99.31
<b>Closing balance</b>	<b>840.00</b>	<b>740.69</b>

The special purposes account currently contains funds from a £1,000 donation from the Oxford Round Table. This was originally given for box replacement and refurbishment but the Round Table has now agreed that it may be spent on anything we consider appropriate.

<b>Administration account</b>	<b>2017</b>	<b>2018</b>
Opening balance	127.74	85.74
Income	-	-
Expenditure	42.00	-
<b>Closing balance</b>	<b>85.74</b>	<b>85.74</b>

The administration account contains donations made by organisations that are happy for their money to be spent on our limited administration expenses.

We would like to thank all our donors, large and small, for their generosity towards us. In particular I would like to thank our regular donors, both organisations and individuals, who have supported us over the years including the Oxfordshire Community Foundation, W Lucy & Co, Bioexcel Limited, Magdalen College, Somerville and Jesus College 2016 Ball Committee, Lincoln College, All Souls College and Magdalen College Trust. We are also very grateful to Celia Fry for continuing to carry out our independent examination.

We would also like to thank the charities to whom we give the money. We have no doubt that the money we pass to them is used efficiently and effectively in support of people in Oxford who are homeless, or in danger of homelessness.

**Paul Armstrong, OxPAT Treasurer, May 2019**

## **4 Grants Policy**

### **Core Principles**

1. OxPAT funds are to be used to provide direct help to homeless or vulnerably housed adults.
2. OxPAT funds can be used to fulfil basic needs such as food, clothing and shelter. They can also be used to help people address the issues that have led to them becoming homeless, by building confidence and self-esteem, improving skills, and addressing dependency issues.
3. OxPAT funds are not to be used to fund administration nor on-going costs, or to discharge statutory duties.
4. OxPAT funds will only be distributed to or through recognised charitable agencies; and must be spent by or under the supervision of such an agency.

## **Distribution**

The monies received by OxPAT are distributed through agency welfare funds to be spent on welfare services, rehabilitation, accommodation and training and education to help people to get off the streets and move forward.

## **Core Agencies**

OxPAT will aim to distribute most of its funds to a core group of agencies via regular monthly standing orders to their welfare funds. It is each agency's responsibility to ensure this money is spent in accordance with OxPAT's core principles and to report back at the end of the calendar year or more frequently as appropriate as to how it has been spent.

## **Specific applications**

Some of OxPAT's funds will be used to fund specific applications which are not from the core agencies. Examples of successful applications include requests for clothing, bedding, work tools, and transport costs to enable a person in need to travel to a job. To apply for a grant for a homeless, or vulnerable, person, please download the OxPAT Grant Application Form from the OxPAT website ([www.oxpat.org](http://www.oxpat.org)), and follow the instructions on it.

## **5 Partners**

### **Core agencies during 2018 were:**

- Aspire Oxfordshire
- Crisis Skylight Oxford
- Elmore Community Services
- Emmaus Oxford
- Julian Housing, part of Homeless Oxfordshire
- O'Hanlon House, part of Homeless Oxfordshire
- Simon House, part of A2 Dominion
- SMART/CJS (Howard House)
- The Oxford Street Population Outreach Team
- The Porch

## **6 Box Officer's Report**

### **Box Locations**

#### **Collection boxes at:**

St Michael at the North Gate Shop, Oxford Town Hall, Henry Wellcome Building, Oxford Union Bar, Bunter's Delicatessen, St Aloysius, Tourist Information Centre, Blackwells, Marks & Spencer Summertown, Magdalen College Bar, Phoenix Cinema, Oxford Railway Station, LMC International, Henry Wellcome Foundation.

**Catherine King, Box Officer, May 2019**

## **7 Donors and Supporters**

Oxford Community foundation, W Lucy & Co., Felicity and Richard Dick, St. Michael's at the Northgate, St Leonard's Church Eynsham, Magdalen College School, Somerville, Lincoln, Magdalen and Merton Colleges, the College JCR's of Brasenose, Christchurch, Jesus, the Queen's, St Anne's, St. Hugh's, St John's, St. Peter's, Trinity and Wadham, Balliol College, Worcester College, Tanner Trust, Christ Church Cathedral, Appleton PCC, Hector Sants Foundation, the Oxford Oratory Church of St. Aloysius Gonzaga, St. Peter's Church Cassington, St Nicholas PCC Marston, Rose Hill Methodist Church, St. Michael's and All Saints Charities St. Peter's Wolvercote, Cumnor United Reformed Church St. Margaret's Institute, the Phoenix Cinema, Oxford University Student Union, Oxford High School, Carol Singing– Oxford City Singers, Appleton Singers, St. Barnabas Primary School, Rose Hill Methodist Church, Oxfordshire County Council(Social Services), Cassington Café, RC Archdiocese of Birmingham, Felixstowe Trust, and many other generous individual donors.

Web : [www.oxpat.org](http://www.oxpat.org)

Registered Charity Number 1070645

Twitter : @OxPATrust

