



Oxford Poverty Action Trust

Annual Report

2014

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1 Chair's Report 2014

Background

The Oxford Poverty Action Trust (OxPAT) was set up in 1996 by a committee including representatives of the City, University, police, churches and concerned citizens to meet the challenge of visible poverty in the streets and invisible poverty in hostels, bed-and-breakfast accommodation etc. Inspired by successful "Diverted Giving" schemes in Winchester and elsewhere, the aim was to establish an umbrella fund to receive donations from the public, including tourists, and distribute them to the existing agencies working to alleviate poverty. One of its aims was to help reduce street begging by persuading the public not to give directly to beggars, and thus fuel dependency on alcohol or drugs; and to provide a means whereby their generosity could be channelled more productively.

OxPAT raised well over £100,000 in its first 10 years, and in 2014 brought the total raised to over £330,000. Money comes to us partly from collection boxes and partly from fund-raising events, but mostly from concerned citizens giving regularly by Gift-Aided bankers' orders.

Changes to the Trustees and Committee

Chris Peri joined the committee in December 2014.

Overview

We have continued to hold monthly meetings and have continued to distribute the bulk of our grants to Core Agencies in accordance with our Grants Policy. The Core Agencies for the 2014 calendar year were: Aspire, Connection Oxford, Crisis, The Elmore Team, Julian Housing, O'Hanlon House, Simon House, Smart CJS, Steppin' Stone and Two Saints. Broadway, St Mungo's and The Gatehouse were 50% share Core Agencies, and the Church of God of Prophecy, Soup Kitchen, also received regular support.

We have, through Marieke Clarke, maintained contact with the Network of Homeless agencies through attendance at the quarterly meeting of the Housing and Homelessness Group coordinated by Oxford City Council.

We held our traditional carol singing before Christmas with children from St Barnabas Primary School.

In a new venture for us, we created and sold a Christmas card to raise money and advertise our existence. Local artist John Somerscales kindly donated the artwork, Ralph Hall designed the card, and Liz Storrar masterminded the sales campaign. All the cards were sold and a healthy profit of something like £1,500 was earned for OxPAT, although not all of it came in 2014's figures.

We are extremely grateful to all our supporters, particularly our box collectors and – of course – the donors who give so generously in order that we may continue our efforts. We are also grateful to those organisations which have made grants towards our Administration Fund, thus enabling all the money received from donors to be distributed to agencies.

The W Lucy & Co Training Fund

In 2013 W Lucy & Co made a special donation of £15,000 to commemorate their 200th anniversary. They made a further donation to this fund of £5,000 in 2014. This is in addition to other regular donations which they make to OxPAT from time to time and for which we are extremely grateful.

In 2014 we gave grants totalling just over £8,000 to Aspire and Crisis to enable them to run courses designed to give marketable skills to homeless people. Aspire ran courses in Painting and Decorating, and Crisis ran a course to help their trainees gain a "Level 1 Award in Health and Safety in Construction Environment" qualification, a pre-requisite to them gaining their "Construction Skills Certificate Scheme" card. The schemes were designed to help over 70 people between them.

Jonathan Clark, Chair, April 2015

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 2014 the following acted as Trustees of the Oxford Poverty Action Trust (known as OxPAT) for some or all of the time:

Jerome Bertram

Deborah Ceadel

Jonathan Clark

Ralph Hall

Meg Movshon

Patrick Mulvihill

Jenny O'Brien

The Patrons of the Trust are:

Rt Revd. William Kenney CP

Mrs. Felicity Dick DL

Gross income during the year 2013 was £50,230.60

Expenditure during the year 2013 was £36,220.50

The Charity's Bankers are:

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

Officers during the year 2014 were:

Chair: Jonathan Clark

Secretary: Meg Movshon

Treasurer: Jenny O'Brien

Fundraising expenses during the year 2014 were: zero. The charity owns no functional property and there are no connected companies.

3. Finance

OxPAT Financial Report for 2014

OxPAT Accounts (figures in £)	2013	2014
<i>Expenditure:</i>		
Admin Sub-Account	233.00	26.65
Grants to Charities	34,665.00	40,313.00
Grants to Individuals	1,322.50	1,063.25
Bank Error	0	27.98
Total Expenditure	36,220.50	41,430.88
<i>Income:</i>		
Boxes	1,922.15	1,779.33
Fund Raising	1,758.95	305.13
Organisations	23,477.35	16,404.65
Places of Worship	3,395.39	3,592.44
Private Donation (Gift Aid)	8,488.00	8,558.00
Private Donation (Non-Gift Aid)	11,175.33	3,459.99
Bank Interest	13.43	18.05
Inland Revenue (Gift Aid Refund)	0	1,917.78
Total Income	50,230.60	36,035.37

Reconciliation with bank	2013	2014
Opening balance	1,855.09	15,865.19
Income	50,230.60	36,035.37
Expenditure	36,220.50	41,430.88
Closing balance	15,865.19	10,469.68

Income

Total income during the year was £36,035.37, compared with £50,230.60 in 2013. In the 17 years OxPAT has been operating, we have collected almost £350,000 from our donors.

The high figure for 2013 included a very generous donation from W Lucy and Co (included in income from organisations). We used this to establish an employment training fund for homeless and vulnerably housed people to be expended over a three to five year period. We would like to thank Lucy's for a further top-up grant to this fund made during 2014. When Lucy's donations for the training fund are excluded, total unrestricted income fell by just over £4,000.

Our income is spread across various categories of donor. Box income showed a small decrease from 2013. The fall in income from fund raising is largely due to the fact that there was no street collection in 2014 and no special events such as fund raising concerts.

Income from organisations (typically college JCRs and local businesses) increased by almost £3,000, when Lucy's donations for the training fund are deducted. Income from places of worship remained more or less stable. We would particularly like to thank St Anne's and Worcester Colleges and St Leonard's Church Eynsham for their very generous support.

Gift Aid donations remained more or less stable. Non-gift aid private donations were particularly high in 2013 because we received several very large one-off donations that year. The 2014 non gift-aid donations include almost £750 profit from the sale of our very successful Christmas cards (with more profit to come in early 2015).

The Inland Revenue gift aid refund of £1,917.78 relates to 2013. The 2014 refund had not been received at 31 December 2014 and will be shown in the accounts for 2015.

Expenditure

The total grants made by OxPAT in 2014 amounted to £41,376.25, which includes two grants from the Lucy's training fund (included in Grants to Charities above). We made a grant to Aspire for training in painting and decorating, as a follow up to the successful courses we had previously funded at Simon House. We also made a grant to Crisis UK to enable them to provide construction-related training in health and safety.

As usual the bulk of OxPAT's income was donated to our core agencies, listed in the table above as "Grants to Charities". Grants to individuals (paid via various charities) were £1,063.25 last year, compared to £1,322.50 in 2013.

We had administration expenses of £26.65, which were mainly spent on postage costs. The bank error appeared on the statement right at the end of the year and has since been rectified.

Special purposes accounts

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

Special purposes account	2013	2014
Opening balance	1,000.00	1,000.00
Income	0.00	0.00
Expenditure	0.00	0.00
Closing balance	1,000.00	1,000.00

The special purposes account currently contains 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.

Administration account	2013	2014
Opening balance	387.39	154.39
Income	0	0
Expenditure	233.00	26.65
Closing balance	154.39	127.74

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 of our donors, large and small, for their generosity towards us. And we are very grateful to Celia Fry for continuing to carry out our independent examination.

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

Jenny O'Brien, OxPAT Treasurer, February 2015

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/), and follow the instructions on it.

5 Partners

Core agencies during 2014 were:

Aspire

Broadway

Church of God of Prophecy, Soup Kitchen

Connection Oxford

Crisis

The Elmore Team

The Gatehouse

Julian Housing: part of Oxford Homeless Pathways

O'Hanlon House

St Mungo's

Simon House: part of A2 Dominion Housing Trust

Smart CJS

Steppin' Stone

Two Saints: Lucy Faithful House

6 Box Officer's Report

Box Locations

Collection boxes at:

St Michael at the North Gate Shop , Christchurch College Lodge, 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 and Francis King, Box Officers, March 2015

7 Donors and Supporters

W Lucy & Co., the Oxford Round Table, St. Michael's at the Northgate, St Leonard's Church Eynsham, Councillor Mark Mills, the College JCR's of Brasenose, Christchurch, the Queen's, St Anne's, St. Hugh's, St. Hilda's, St John's, St. Peter's, Trinity and Wadham, the Oxford Oratory Church of St. Aloysius Gonzaga, St. Peter's Church Cassington, 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 Brookes University graduates, Oxford University Student Union, Oxford High School, Carol Singing– Oxford City Singers, St. Ebbe's Primary School, St. Barnabas Primary School, Rose Hill Methodist Church, Waitrose Headington, Oxfordshire County Council(Social Services), Darbys Solicitors, Cassington Café, RC Archdiocese of Birmingham, Felixstowe Trust, and many other generous individual donors.

