



## Oxford Poverty Action Trust

### Annual Report

2015

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## **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 2015 brought the total raised to over £ 370,000. 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.

During the last couple of years the problem of homelessness in Oxford has become much more acute. Cuts by central government to local authorities have resulted in less funding being available to homelessness services. For example Oxfordshire County Council have in the last two years reduced their support to the sector by over 75 %. At least one hostel (Lucy Faithfull House) in Oxford has closed. The number of people sleeping rough in Oxford appears to have gone up by 50 %. Against this background, there is even more need for other sources of funding to help homeless people, so I am pleased that we have received more donations than ever before from our kind supporters.

## **Changes to the Trustees and Committee**

Chris Peri resigned from the committee during 2015.  
Diane Price joined the committee during 2015.

## **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 2015 calendar year were: Aspire, Crisis, The Elmore Team, Emmaus Oxford, Julian Housing, O'Hanlon House, Simon House, Smart CJS, St Mungo's Broadway and Steppin' Stone. The Church of God of Prophecy Soup Kitchen, now known as Icolyn Smith Foundation 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 now traditional carol singing before Christmas with the Appleton Community Choir at Oxford Railway Station.

For the second year, 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. This made a welcome contribution to our funds.

We are extremely grateful to all our supporters 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 gave us a grant in celebration of their 200th anniversary, which we used to establish the W Lucy & Co Training Fund. Its purpose is to fund initiatives which will provide skills development to homeless people, to better equip them to compete in the jobs market place.

During 2015, two projects continued to run that were begun during 2014. They were

Crisis - Helping homeless people into construction

Aspire - Painting and Decorating course

Both projects were to develop and run courses in their respective areas. They were successfully created, accredited and run for the benefit of the trainees of the respective organisations. Crisis continue to run their course, while Aspire are seeking further funding to continue to run their course.

In November 2015 we awarded grants for three further activities which are ongoing.

Steppin Stone - Steppin' Forward IT Project

Crisis - IT and job ready skills

Aspire - Professional Services team

The first two of these are to develop and run courses for clients. The third was to fund the capital cost of an additional professional services team at Aspire. This will of course enable more people who are homeless or at risk of homelessness to develop skills and behaviours which will help them to get jobs.

We are very grateful to W Lucy & Co for continuing to fund these projects, which they have done with annual grants since 2013.

## Jonathan Clark, Chair, April 2016

## 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 2015 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

## Oxford Poverty Action Trust 2015

Officers during the year 2015 were:

Chair: Jonathan Clark  
Secretary: Meg Movshon  
Treasurer: Jenny O'Brien and Paul Armstrong

The Patrons of the Trust are:

Rt Revd. William Kenney CP  
Mrs. Felicity Dick DL

Gross income during the year 2015 was £ 39,273.96

Expenditure during the year 2015 was £ 44,319.24

The Charity's Bankers are:

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

Fundraising expenses during the year 2015 were: zero.

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

### 3. Finance

#### OxPAT Financial Report for 2015

OxPAT Accounts (figures in £)	2014	2015
<b>Expenditure:</b>		
Admin Sub-Account	26.65	-
Grants to Charities	40,313.00	41,489.00
Grants to Individuals	1,063.25	350.00
Bank Error	27.98	(27.98)
Returned cheques and bank charges	-	834.22
2015 Christmas cards	-	1,674.00
<b>Total Expenditure</b>	<b>41,430.88</b>	<b>44,319.24</b>
<b>Income:</b>		
Boxes	1,779.33	1,665.02
Fund Raising	305.13	716.32
Organisations	16,404.65	16,795.22
Places of Worship	3,592.44	3,781.88
Private Donation (Gift Aid)	8,558.00	7,064.88
2014 Christmas cards	-	1,349.48
2015 Christmas cards	-	1,062.25
Private Donation (non-Gift Aid) <sup>1</sup>	3,459.99	6,729.18
Bank Interest	18.05	8.43
Inland Revenue (Gift Aid Refund)	1,917.78	-
Special events	-	101.30
<b>Total Income</b>	<b>36,035.37</b>	<b>39,273.96</b>

## Oxford Poverty Action Trust 2015

Reconciliation with bank	2014	2015
Opening balance	15,865.19	10,469.68
Income	36,035.37	39,273.96
Expenditure	41,430.88	44,319.24
Closing balance	10,469.68	5,424.40

<sup>1</sup>Christmas card revenue from 2014 cards is included in 'Private Donation (Non-Gift Aid)' revenue, for consistency with the 2014 annual report. As per the 2014 report, by the end of 2014, sales of that year's Christmas cards had earned a profit of £750. When adding the revenue received in 2015 from the sales of these cards, this indicates a total profit of £1,812.25 from the 2014 Christmas cards.

### Income

Total income during the year was £39,273.96, compared with £36,035.37 in 2013. In the 18 years OxPAT has been operating, we have collected over £370,000 from our donors.

Very generous donations from W Lucy and Co (included in income from organisations) in 2013 and 2014 have been used 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 2015. Excluding Lucy's donations to the training fund, total unrestricted income rose by around £5,000.

Our income is spread across various categories of donor. Box income showed a small decrease from 2014. The increase in income from fund raising is largely due to the fact that there was a street collection in 2015, but not one in 2014; 2015 also saw donations from several special events such as meetings and musical groups.

Income from organisations (typically college JCRs and local businesses) increased by over £2,000, 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 Worcester College, the Tanner Trust, the Hector Sants Foundation and St Leonard's Church, Eynsham for their very generous support.

Gift Aid donations decreased by around £1,500, almost entirely due to a decrease in occasional Gift Aid donations. Non-Gift Aid private donations have nearly trebled due to CAF donations increasing by around £1,000, substantial revenue from Christmas cards and several large occasional donations from individuals. The 2015 Christmas cards brought in revenues of over £1,300 in non-Gift Aid donations in 2015, (with more to come in 2016). An additional £1,100 of non-Gift Aid revenue was from 2014 Christmas card sales, deposited in early 2015.

The 2014 Gift Aid refund had not been received at 31 December 2015, and will be shown in the accounts for 2016. Gift Aid for 2015 will be claimed early in 2016.

### Expenditure

The total grants made by OxPAT in 2015 amounted to £41,839, which includes three grants from the Lucy's training fund (included in Grants to Charities above). We gave grants to Steppin' Stone for a vocational and IT skills project, to Crisis for an IT training project and to Aspire a landscaping and gardening training project.

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 £350 last year, compared to £1,063.25 in 2014.

We had no administration expenses last year. The bank error payment rectifies a bank error which occurred at the end of 2014. We received a cheque from Worcester College JCR for £828.22 which was returned, incurring a £6.00 bank charge. We have followed-up with Worcester College JCR, and this issue is still in process.

Our cost of goods sold was £1,674 and is composed entirely of the printing costs of our 2015 Christmas card.

## Special purposes accounts

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

Special purposes account	2014	2015
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	2014	2015
Opening balance	154.39	127.74
Income	0.00	0.00
Expenditure	26.65	0.00
Closing balance	127.74	127.74

The administration account contains donations made by organisations that are happy for their money to be spent on our limited administration expenses. No transactions have been made concerning this account in 2015.

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. I 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, March 2016**

## 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 2015 were:

Aspire

Icolyn Smith Foundation

Crisis

The Elmore Team

Emmaus Oxford

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

## 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, April 2016**

## 7 Donors and Supporters

W Lucy & Co., the Oxford Round Table, St. Michael's at the Northgate, St Leonard's Church Eynsham, the College JCR's of Brasenose, Christchurch, 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, 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, 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.

