



Oxford Poverty Action Trust Annual Report 2019

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1 Chair's Report 2019

The problem

At the end of 2018 the local authorities estimated that there were 94 people sleeping rough in the City of Oxford, and 119 sleeping rough in the county of Oxfordshire. Despite the best efforts of many agencies, it seems there were of the order of 120 people rough sleeping in Oxford at the end of 2019. The problem of homelessness in the city appears to be particularly intractable. Many of the reasons are well known – the cost of housing in Oxford, the austerity imposed by central government on local government for the last ten years, and the associated cuts to expenditure on housing, mental health and drug services.

The OxPAT Response

Despite the problems, the charities engaged in supporting single homeless people in Oxford continue to do excellent work, and the Oxford Poverty Action Trust (OxPAT) continues to provide a mechanism for concerned citizens to donate to these local charities. Active since 1996 the Oxford Poverty Action Trust (OxPAT) has distributed over £600,000 to support homeless people in Oxford, including over £100,000 in 2019. We have done 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. In 2019, excluding the cost of buying Christmas cards, which we sell for a profit, we had less than £200 of costs.

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.

Activities in 2019

Fund raising

2018 – 2019 Match fund with Oxfordshire Community Foundation

As reported in the 2018 Annual Report, over the Christmas period of 2018, we ran a joint campaign with the Oxfordshire Community Foundation (OCF) where OCF promised to match the money donated to OxPAT by the public, pound for pound. OCF also managed the publicity for the campaign, resulting in a lot of coverage in the local press. In total £42,833.13 was donated by the public, which was matched by OCF, resulting in a total raised of £85,666.26. The bulk of this was paid to us in January 2019, and paid to our partner charities also in January 2019.

2019 Christmas cards

Once again local artist John Somerscales was kind enough to give us the artwork for our 2019 Christmas Card, a lovely winter scene of Tom Tower at Christchurch College. We sold the cards directly to members of the public, via the "Cards for Good Causes" shop at Oxford Town Hall, and via the Hayfield Deli in Hayfield Rd.

Carol singing

The Appleton singers, marshalled by Trish Wagstaff, came and sang for us at the Oxford Railway Station. We would like to thank Trish, the Appleton singers, Great Western Railway and the public for helping us raise money in this way.

Councillor Susannah Pressel was kind enough to arrange for the children of St Barnabas School to sing for us at the Westgate Centre. Again, we would like to thank the members of the public who donated, the School, Councillor Pressel and Land Securities, the owners of the Westgate Centre.

Nuffield College also collected money for us at their Carol Concert in the Nuffield Chapel.

Collection day at Eights week on Christchurch Meadow

Christchurch College were kind enough to allow us to have a collection on Christchurch Meadow on the Saturday of Eights week.

Contactless collecting pilot

Greater Change (www.greaterchange.co.uk) helped us to run a pilot of contactless giving in Oxford. They supplied us with contactless terminals which we placed in the Co-op on Walton St and in Alden's Fish Market in Osney. The terminals raised over £1,000 during 2019 and gave us experience of contactless terminals as a means of raising money. We wish to thank Greater Change, the Co-op and Aldens for supporting us with this.

Magdalen College School

Magdalen College School selected us as one of their charities for support this year. Henry King, a pupil at the school, made a video recommending us to be selected and he was successful, so thanks to Henry and the school.

Distribution

In January we solicited applications to be our 'core agencies' from local homelessness charities in Oxford. We evaluated the applications at our February meeting and selected the charities listed in section 5 Partners below. We are convinced that these agencies are amongst the most effective in Oxford and we thank them for partnering with us again this year.

Between them these charities provide 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.

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 2019 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 2019 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

It is with sadness that we have to announce the loss of two of our committee members this year. Jim Campbell suffered a stroke and had to stand down, and Father Jerome Bertram died.

We are delighted to welcome Suzi Coyne and Ben Chataway to the committee.

Jonathan Clark, Chair, May 2020

3 Finance

OxPAT Financial Report for 2019

| OxPAT Accounts (figures in £) | 2018 | 2019 |
|--|------------------|-------------------|
| <i>Expenditure:</i> | | |
| Admin and Special Purposes Sub-Accounts | 99.31 | 99.31 |
| Grants to Charities | 61,008.00 | 103,250.00 |
| Grants to Individuals | 200.00 | 736.50 |
| Christmas cards | 1,980.00 | 990.00 |
| Bank error | - | 98.00 |
| Total Expenditure | 63,287.31 | 105,173.81 |
| <i>Income:</i> | | |
| Boxes | 1,571.55 | 2,772.10 |
| Fund Raising | 1,586.66 | 2,837.22 |
| Organisations | 16,770.96 | 48,994.51 |
| of which OCF Christmas 2018 match funding ¹ | - | 42,833.13 |
| of which donations from other organisations | 16,770.96 | 6,161.38 |
| Places of Worship | 539.33 | 3,417.00 |
| Private Donations (Gift Aid) | 14,170.50 | 13,837.50 |
| 2017 Christmas cards | 1,743.00 | - |
| 2018 Christmas cards | 375.00 | 1,801.08 |
| 2019 Christmas cards | - | 446.50 |
| Donations via platforms (online & offline) | 23,742.64 | 27,176.51 |
| of which donations via CAF ² | 19,201.98 | 25,878.83 |
| of which donations via other platforms ³ | 4,540.66 | 1,297.68 |
| Other Private Donations (Non-Gift Aid) | 3,478.89 | 6,070.33 |
| Special events | 275.00 | 865.89 |
| Other | 739.94 | 324.00 |
| Total Income | 64,993.47 | 108,542.64 |

*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. ¹The Oxfordshire Community Foundation (OCF) kindly agreed to match fund donations between 10 December 2018 and 6 January 2019; OxPAT received this match funding in January 2019. ²Includes online donations made via CAF, CAF cheques and Gift Aid collected via CAF. ³Includes other donation platforms such as JustGiving, Stewardship, The Big Give or Charitable Giving; donations plus any gift aid collected on behalf of OxPAT are included in this row.

| Reconciliation with bank | 2018 | 2019 |
|--------------------------|-----------|------------|
| Opening balance | 10,893.04 | 12,599.20 |
| Income | 64,993.47 | 108,542.64 |
| Expenditure | 63,287.31 | 105,173.81 |
| Closing balance | 12,599.20 | 15,968.03 |

Income

2019 has been a record year for OxPAT – beating our previous record in funds distributed (last year) by nearly 70%! Total income during 2019 was £108,542.64 compared to £64,993.47 in 2018. In the 20 years OxPAT has been operating, we have collected over £600,000 from our donors. The increase in income from 2018 to 2019 – an increase of £43,549.17 is primarily due to a sizeable increase in donations in January 2019, 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, plus the match funding received from OCF. 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.

Our income is spread across various categories of donors and donation channels. Box income increased from 2018 to 2019 by over £1,200. Fundraising income also increased by around £1,200, reflecting collections held during Summer Eights Week, Carol singing before Christmas and a generous collection at Besselsleigh Christmas Lights. Income from organisations increased substantially due to the matching funds from OCF, though income from other organisations fell from 2018 by around £10,600, reflecting a number of substantial one-off donations from organisations in 2018 (largely during the period of the OCF match funding), which we do not expect to be repeated. Income from places of worship increased by nearly £2,900, reflecting a number of increased donations from existing donors, and new places of worship donating to OxPAT as well. Gift Aid eligible donations are broadly in line with 2018 (around £300 less in 2019) – which reflects a maintained increase in regular Gift Aid standing orders since 2017 and years prior. Donations via CAF have increased by over £6,000 from 2018 due to new Gift Aid eligible standing orders as well as one-off donations, in particular made during the OCF matching funds campaign.

The 2019 Christmas card saw revenues of £446.50 in 2019. 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 2019 Christmas card is expected to be collected in 2020. Overall, 2018 Christmas card sales brought in income of £2,118 across 2018 and 2019, leading to a profit of £1,228.00 for 2018 Christmas card sales.¹

This year, we report donations made via fundraising platforms² such as Charities Aid Foundation (CAF) or Just Giving, as this has been a growing a substantial stream of income. In 2019, donations via platforms were around £3,400 more than in 2018, and in particular donations made via CAF were nearly £6,700 more than in 2018. This increase reflects a number of regular donations made via CAF, as well as additional one-off donations. Revenue via fundraising platforms includes any Gift Aid collected by a given platform on our behalf.³

Special events income has increased by nearly £600, reflecting additional collections at externally organised events to sponsor OxPAT. Other income reflects donations made directly to our bank account which are not attributable to a specific individual/organisation – this decreased from 2018 (by around £400).

Expenditure

The total grants made by OxPAT in 2019 amounted to £105,173.81, nearly all of which was donated as regular distributions to our core agencies, totalling £103,250. As mentioned above, the OCF matching funds campaign has driven an increase in donations, and consequently an increase in regular distributions made in 2019, to be around 70% higher than in 2018. Grants to individuals (paid via various charities) increased by around £500, reflecting additional applications for individual grants in 2019.

Our costs for Christmas card printing was £990 in 2019, covering Christmas cards printed in that year.

Our administrative and special purposes expenses in 2019 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

| Special purposes account | 2018 | 2019 |
|--------------------------|--------|--------|
| Opening balance | 840.00 | 740.69 |
| Income | - | - |
| Expenditure | 99.31 | - |
| Closing balance | 740.69 | 740.69 |

The special purposes account currently contains funds from a 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.

¹minutes As per the 2018 annual report, printing costs for 2018 Christmas cards were £990.

² Compared to the income breakdown in the 2018 report, this includes 'CAF donations', 'Internet donations', 'Inland Revenue (Gift Aid Refund)' collected by donation platforms last year, and 'Other Private Donation (Non Gift-Aid)' where donations were made via a fundraising platform.

³ Two sizeable gift aid payments for prior years were received from HMRC in early January 2020, and Gift Aid for payments made directly to OxPAT by bank transfer or cheque will be claimed in 2020.

| Administration account | 2018 | 2019 |
|------------------------|-------|-------|
| Opening balance | 85.74 | 85.74 |
| Income | - | - |
| Expenditure | - | 85.74 |
| Closing balance | 85.74 | - |

The administration account contains donations made by organisations that are happy for their money to be spent on our limited administration expenses, and expenditure against this account reflects allocating the remainder of the funds in this account against the purchase of insurance for the Summer Eights week collection.

We would like to thank all our donors, large and small, for their generosity towards us. In particular we 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, St Leonard's Church Eynsham, Horton Cum Studley PCC, All Souls College, Appleton PCC and the Westminster Society. 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, July 2020

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 2019 were:

Aspire Oxfordshire
The Big Issue
Connection Support
Crisis Skylight Oxford
Elmore Community Services
Community Housing, part of Homeless Oxfordshire
O'Hanlon House, part of Homeless Oxfordshire
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
Wellcome Trust Centre (Old Road Campus)
Hayfield Deli
Blackwells
Magdalen College Bar
Oxford Railway Station
LMC International
Iffley Turn Practice

Catherine King, Box Officer, September 2020

