



## **Oxford Poverty Action Trust**

### **Annual Report**

**2010**

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## 1 Chair's Report 2010

### 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 channeled more productively.

OxPAT raised well over £100,000 in its first 10 years, and is well on the way to raising a further £100,000. 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 Committee

There were no changes to officers during 2010. Ralph Hall, who has been helping us with leaflet and poster design, joined the committee. Sr Anne CSJB, Chaplain to the Homeless, provided an invaluable link with our client community. She retired at the end of the year. We gained a new Patron in Felicity Dick, Deputy Lord Lieutenant, who has already distinguished herself as our most pro-active Patron to date, a fund of enthusiasm and ideas.

### 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 following were successful in their applications to be Core Agencies for the 2011 calendar year: Simon House, The Gatehouse, Elmore Community Services, Connection Floating Support Team (Oxford City), The Porch Steppin' Stone Centre, Julian Housing, O'Hanlon House and Two Saints (formerly ECHG). Aspire Oxfordshire Community Enterprise Ltd and the Church of God of Prophecy, Soup Kitchen will each be 50% share Core Agencies.

Until the closure of the Gap in the autumn we kept in touch with the Network through the attendance at their monthly meetings of one or another of Marieke Clarke, Sister Anne, and Meg Movshon. Since then Marieke has maintained contact through attendance at the quarterly meeting of the Single Homeless Group.

We have continued our links with Oxford students through Oxhub. Marc Kusicka, project coordinator for OHCV Homeless Action Group, was instrumental in a number of student fundraising initiatives. He was succeeded at year end by Rachel Holden. We are particularly grateful to the OUSU students who helped with our now annual street collection in May.

Ralph Hall and Oxford Design and Illustrators once again helped with design expertise enabling us to roll out updated posters and leaflets. Money received from S Michaels and All Saints Charities enabled us to revamp our small collection boxes, replacing them with smart new house shaped boxes which also offer greater security.

We held our traditional carol singing before Christmas and 2 schools took part - West Oxfordshire Primary School, and St Barnabas Primary School. We also sang carols at Oxford Station with the help of the Oxford City Singers.

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.

**Deborah Ceadel Chair, February 2011**

## 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 28<sup>th</sup> 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 2010 the following acted as Trustees of the Oxford Poverty Action Trust (known as OxPAT) for some or all of the time:

Jerome Bertram  
Stephen Brown  
Deborah Ceadel  
Jonathan Clark  
Marieke Clarke  
Andrew Lack  
Meg Movshon  
Patrick Mulvihill  
Susanna Pressel

The Patrons of the Trust are:

Rt Revd. John Pritchard, Bishop of Oxford  
Rt Revd. William Kenney CP  
Mrs. Felicity Dick DL

Gross income during the year 2010 was £20,109.08

Expenditure during the year 2010 was £20,855.04

The Charity’s Bankers are:

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

Officers during the year 2010 were:

Chair: Deborah Ceadel  
Secretary: Meg Movshon  
Treasurer: Jonathan Clark

Fundraising expenses during the year 2010 were: none.

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

### **3 Financial Report**

#### **Grants**

As usual the bulk of OxPat’s income was donated to our ten core agencies, listed in the table below in the section “EXP-Grants – Charities”. The total paid out to core agencies in **2010 was** £20,160 compared with £21, 590 in 2009. There was one extra agency in 2010 compared to 2009, which spread the funds a little more thinly, and our income was down compared with 2009, so each agency received less money from OxPAT than in 2009. One agency closed during the year (The Gap) so while their total grant was very much down compared to 2009, some money was thereby released for the other core agencies. Grants to individuals were only £348.93 in 2010, compared to £790 in 2009.

The total grants made by OxPAT in 2010 amounted to £20,508.93

#### **Administration expenses**

Our administration expenses were as usual extremely small. We spent £113.11 on collection buckets and badges to support the annual street collection (listed as Maintenance in the table), and £233 to print brochures (Publicity in the table). This money came out of the grant made to us in 2009 by St Michael at the

Northgate, of which we have left £248.26. We also have our general administration fund which contains at year-end £517.63. That is an increase of £50 during the year, because when Costain kindly donated £200, they allowed us to reserve £50 for administration expenses. We spent nothing from that fund in 2010.

## Income

Total income during the year was £20,109.08, compared with £24,174.42 in 2009. This is the first time since 2003 that our income has gone down. In the thirteen years OxPAT has been operating, we have collected more than £189,000.

Within the overall total there are ups and downs compared with last year, and I would like to highlight the following.

1. Box income was up £400 during the year. About half of that was due to the reinstatement of the Blackwell's box, and I like to think the improved collection boxes which we purchased in 2009 has contributed to the rest.
2. Fund raising was down by about £700. The street collection was not so good as in 2009, and we received less money from carol concerts.
3. W Lucy and Co was extremely generous to us this year, which more than made up for some shortfall from other organisations. In 2009 for example we received nearly £2000 from the student rag week which we didn't receive in 2010. We hope it will be our turn again soon. Amongst the colleges St Anne's JCR maintained their status as a very generous donor.
4. It seems churlish to mention it, but income from Places of Worship was significantly down in 2010 because St Aloysius did not repeat their magnificent donation of £4,000 which they gave us in 2009.
5. Private Donation (Gift Aid) hides the many generous individuals who make regular donations to us by standing order. Although the total was much the same at about £5,400 in both 2009 and 2010, the amount from monthly standing orders shot up from about £2,000 to almost £3,000. This made up for a couple of significant missing donations which we have been used to receiving as one-off's during the year. We also received another £1,400 or so back from the Inland Revenue which is recorded separately in the accounts, but which of course derives from this category.
6. Private Donation (Non-Gift Aid) is mainly occasional gifts from individuals via agencies such as Charities Trust, which allow people to donate to various charities in a tax efficient way (the gift aid has already been claimed back before we receive the money). In previous years we have received an anonymous donation via solicitors in this category of £2,000, which we didn't receive in 2010. Given that, it is quite pleasing that this category only fell by £700 compared to 2009.

Although our total income fell compared to 2009, there were some encouraging increases in some areas. We did not receive several large (£500+) donations which we have been used to receiving, and that is mainly why our income fell. Whether this is because of the current economic circumstances it is impossible to tell.

I would like to thank all of our donors, large and small, for their great generosity towards us. I would also like to thank our core agencies 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.

**Jonathan Clark, OxPAT Treasurer, January 2011**

<b>OxPAT Accounts 2010</b>	
<b>EXPENDITURE</b>	
EXP-Admin Sub-Account	
Maintenance	£113.11
Publicity	£233.00
Total	£346.11

EXP-Grants - Charities	
Aspire Oxfordshire	£1,185.00
Cherwell Housing Trust (Simon House)	£2,370.00
Church of God - Soup Kitchen	£1,185.00
Connection Oxford	£2,370.00
Julian House	£2,370.00
O'Hanlon House	£2,370.00
Steppin' Stone	£2,370.00
The Elmore Team	£2,370.00
The Gap	£1,200.00
The Gatehouse	£2,370.00
Total	£20,160.00
EXP-Grants - Individuals	
Smart CJS	£200.00
Specialist Community Addictions Services	£148.93
Total	£348.93
<b>TOTAL EXPENDITURE</b>	<b>£20,855.04</b>
<b>INCOME</b>	
INC - Boxes	
Blackwells	£295.19
Bunters	£60.09
Christchurch Porter's Lodge	£31.64
H Wellcome	£40.66
LMC International	£9.42
M&S, Summertown	£931.64
Railway Station	£610.84
Roynon	£40.00
St Michael's Shop	£95.53
Tourist Information Centre	£15.94
Town Hall	£60.12
Undesignated	£13.40
Total	£2,204.47
INC - Fund Raising	
Carol Singing	£413.46
Carol Singing - St Barnabas School	£316.51
Street Collection	£762.03
Total	£1,492.00
INC - Organisations	
Brasenose JCR	£275.00
Costains	£200.00

Deanery Pennwood House	£200.00
Exeter College	£100.00
W Lucy & Co	£4,000.00
OXHUB	£35.30
St Anne's JCR	£606.00
St Hilda's JCR	£2.67
Wadham Students Union	£240.00
<b>Total</b>	<b>£5,658.97</b>
<b>INC - Places of Worship</b>	
Rose Hill Methodist	£68.00
St Aloysius - The Oratory	£406.50
St Michael at the Northgate	£328.57
<b>Total</b>	<b>£803.07</b>
<b>INC - Private Donation (Gift Aid)</b>	
Annual	£1,020.00
Monthly	£2,969.00
Occasional	£900.00
Quarterly	£450.00
<b>Total</b>	<b>£5,339.00</b>
<b>INC - Private Donation (Non-Gift Aid)</b>	
Anonymous	£60.00
CAF	£1,545.96
Charitable Giving	£245.00
Charities Trust	£466.93
Individual	£155.00
MyCharityPage	£456.00
<b>Total</b>	<b>£2,928.89</b>
INC- Bank Interest	£0.39
INC- Inland Revenue (Gift Aid) Refund	£1,429.45
Unknown	£252.84
<b>Total Income</b>	<b>£20,109.08</b>
<b>RECONCILIATION WITH BANK</b>	
Opening Balance	£1,608.01
Income	£20,109.08
Expenditure	£20,855.04
<b>Closing Balance</b>	<b>£862.05</b>
<b>ADMINISTRATION SUB-ACCOUNT (included above)</b>	
Opening Balance	£467.63

Income	£50.00
Expenditure	0
<b>Closing Balance</b>	<b>£517.63</b>
<b>ST MICHAEL'S GRANT ACCOUNT (included above)</b>	
Opening Balance	£594.37
Income	£0.00
Expenditure	£346.11
<b>Closing Balance</b>	<b>£248.26</b>

## 4 Grants Policy

### Core Principles

1. OxPAT funds are to be used to provide direct help to homeless or vulnerably housed adults - e.g. food, clothing, shelter, rehabilitation.
2. OxPAT funds are not to be used to fund administration nor on-going costs, nor to discharge statutory duties.
3. 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 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 2010 were

**Simon House** : part of A2 Dominion Housing Trust  
**Connection Oxford** : support team for single vulnerable people  
**Julian Housing**: part of Oxford Homeless Pathways  
**O'Hanlon House**: part of Oxford Homeless Pathways  
**Elmore Team** : support for people with complex needs  
**The Gatehouse** : drop-in centre for over 25s  
**Steppin' Stone/The Porch** : day centre

Aspire Oxfordshire  
The Church of God Soup Kitchen

## Other Partners

Asylum Welcome

## 6 Box Officer's Report

### Box Locations

#### Collection boxes at:

Tourist Information Centre, St Michael at the North Gate Shop , Christchurch College Lodge, Oxford Union Bar, Oxford Central Library Bunter's Delicatessen, Cowley Swimming Pool, Marston Ferry Sports Centre, Linacre College, Magdalen College, Quakers Shop, St Aloysius, Celebrations, Oxford Town Hall Reception, Blackwells, Summertown M&S, Phoenix Cinema, Oxford Railway Station, BHS, LMC International, Oxunprint .

Catherine and Francis King, Box Officers, March 2011

## 7 Donors and Supporters

The Oxford Oratory Church of St. Aloysius Gonzaga, St Michael at the Northgate, Oxford University Student Union, St Hilda's JCR, Darbys Solicitors LLP, St Anne's JCR, Costain, The Westward Trust, Exeter College, Jesus College, St Michaels And All Saints Charities, The Community of St. John Baptist at Begbroke , Concerts at St. Michael at The Northgate, CAF, Magdalen College MCR, Worcester College JCR, Carol Singing– Oxford City Singers, West Oxford Primary School, St. Ebbe's Primary School, St . Barnabas Primary School, Rose Hill Methodist Church, the Society of Friends and many Private Donations.

