



## Oxford Poverty Action Trust

### Annual Report

2008

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# 1 Chair's Report 2007-2008

## 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 over £50,000 in the years 2006 to 2008. 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

Jonathan Clark took over from Stephen Brown as Treasurer and was appointed a Trustee. Meg Movshon took over as Grants Officer from Marieke Clarke (who remains a Committee member), combining this with her role as Secretary.

John Tanner took Susanna Pressel's place as representative of the City Council, on Susanna's appointment as Lord Mayor. Susanna remains a Trustee. We said goodbye to Rosamund Forbes who has left ECHG.

## Overview

We have continued to hold monthly meetings (with the exception of August) 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 2009 calendar year: Simon House, The Gap, The Gatehouse, Oxford Night Shelter, Elmore Community Services, Connection Floating Support Team (Oxford City), The Porch Steppin' Stone Centre, and Aspire Oxfordshire Community Enterprise Ltd. The Church of God of Prophecy, Soup Kitchen will be a 50% share Core Agency. We have introduced an application form for individual grants.

We have been 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; and our programme of visits to client agencies continues. We have also established links with Oxford students through Helen Tyson of Oxhub and hope to involve them more directly in our work, particularly in a fundraising day which is planned for February 14. We held our traditional carol singing event with West Oxfordshire Primary School.

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, January 2009**

## 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 2008 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  
Marieke Clarke  
Andrew Lack  
Meg Movshon  
Patrick Mulvihill  
Susanna Pressel  
Jonathan Clark

The Patrons of the Trust are:

Hugo Brunner, former Lord-Lieutenant of Oxfordshire  
Rt Revd. John Pritchard, Bishop of Oxford

Gross income during the year 2008 was £20,417.32  
Expenditure during the year 2008 was £21,650.00

The Charity’s Bankers are:

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

Officers during the year 2008 were:

Chair: Deborah Ceadel  
Secretary: Meg Movshon  
Treasurer: Stephen Brown/Jonathan Clark

The Independent Examination of the Accounts was carried out by: Celia Fry

Fundraising expenses during the year 2008 were: none.

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

## 3 Financial Report

In 2008 Oxpat raised £20,417.32, of which Inland Revenue gift aid refunds made up £5,360.78. Receipts from traditional sources (i.e. not counting gift aid) were £15056.54, down 4% from 2008’s £15,608.55.

During the year, OxPAT distributed £21,650, 96% of which went to our eight core agency partners, who are listed in the table below. Grants to individuals totalling £850 made up the

remaining 4%. There were no administration costs during 2008, so as usual we were able to ensure that 100% of the money donated to OxPAT went to supporting individuals in need. We continue to aim to distribute the funds as quickly as possible, maintaining as small a balance as possible.

## OxPAT Accounts 2008

### Income

#### INC - Boxes

Blackwells	291.69
Bunters	65.68
Christchurch Porter's Lodge	20.68
Cowley Baths	1.48
Ferry Centre Baths	3.1
M&S, Summertown	971.44
Miscellaneous	150.69
Oxford Union Bar	83.44
Phoenix Cinema	4.85
St Michael's Shop	39.09
Tourist Information Centre	27.47
Town Hall	191.27

Total 1850.88

#### INC - Organisations

Magdalen College MCR	950
NHS	50
Worcester College	306

Total 1306

#### INC - Fund Raising

Carol Singing	252.03
Talk fees	444.69

Total 696.72

#### INC - Places of Worship

Community of St John Baptist	734
Rose Hill Methodist	69.15
Society of Friends	39.32
St Aloysius - The Oratory	177.22
St Michael at the Northgate	1079.95

Total 2099.64

#### INC - Private Donation (Gift Aid)

Annual	1020
Monthly	1789
Occasional	1445
Quarterly	450

Total 4704

#### INC - Private Donation (Non-Gift Aid)

Anonymous	2080
CAF	1498.09
Charities Trust	383.32
Individual	70
The Westward Trust	200

Total 4231.41

INC- Bank Interest	9.29
INC- Inland Revenue (Gift Aid) Refund	5360.78
Unknown donors	158.6
<b>Total Income</b>	<b>20417.32</b>

**Expense**

<b>EXP-Grants - Charities</b>	
Cherwell Housing Trust (Simon House)	2600
Church of God - Soup Kitchen	2600
Churches Housing Trust (ECHG)	2600
Connection Oxford	2600
Oxford Night Shelter	2600
The Elmore Team	2600
The Gap	2600
The Gatehouse	2600
<b>Total</b>	<b>20800</b>
<b>EXP-Grants - Individuals</b>	
Aspire Oxfordshire	100
Asylum Welcome	500
The Porch-Stepping Stones	250
<b>Total</b>	<b>850</b>
<b>Total Expense</b>	<b>21650</b>
<b>Grand Total</b>	<b>-1232.68</b>

**Reconciliation with bank**

Opening Balance	£1,812.00
INCOME	£20,417.32
EXPENDITURE	£21,650.00
Closing Balance	£579.32

**ADMINISTRATION SUB-ACCOUNT (included within)**

Opening Balance	£393.73
INCOME	£0.00
EXPENDITURE	£0.00
Closing Balance	£393.73

**Notes on sources of funding**

Income from Boxes in 2008 was slightly down from last year, at £1,850.88. As ever we are particularly grateful to the customers and staff of Marks & Spencer, Summertown, who at £971.44 contributed more than 50% of the total, and of Blackwells and the Town Hall, who are the next most significant contributors in this category.

Income from Organisations is less than last year, at £1,306, but there were significant donations from Oxford University in the shape of Magdalen College MCR and Worcester College JCR. Income from Fund Raising was steady. We were supported by carol concerts given by the pupils of West Oxford Primary School, and St Ebbe's school, which raised £250 between them. One of our committee members gave some talks and donated his fees to the charity, which raised the bulk of this category at over £440.

Income from Places of Worship was up over £500 compared with 2007, at £2,099.64. The bulk of this came in the form of a large donation from The Community of St. John Baptist at Begbroke,

and a series of concerts at St Michael at the Northgate which generated a steady flow through the year.

Income labelled Private Donations, mainly from individuals, made up more than half of OxPAT's donated income (i.e. income excluding Gift Aid repayments from the Inland Revenue) in 2008. At £8,935.41, it was slightly lower than last year's £9,206.51. Approximately half of that total attracts Gift Aid, so there will be a further amount of over a thousand pounds from that contribution in due course. The Gift Aid money is largely from regular standing orders from individuals. The non-Gift Aid money tends to come in the form of one-off donations, some large, some small, and largely unpredictable. As you can see from the figures, a significant amount comes from the Charities Aid Foundation (CAF) which, like the money from Charities Trust, has probably already had the Gift Aid relief applied.

This is my first report as treasurer and I would like to thank Celia Fry who has again scrutinised the accounts. I would also like to thank my predecessor, Stephen Brown, for making the hand-over such a simple task, due largely to the clear and accurate records he has handed to me. Finally, on behalf of all our beneficiaries, I would like to thank all our contributors and supporters.

Jonathan Clark, OxPAT Treasurer  
January 2009

## **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 2008 were

- Cherwell Housing Trust (Simon House)
- Church of God - Soup Kitchen
- Churches Housing Trust (ECHG)
- Connection Oxford
- Oxford Night Shelter
- The Elmore Team
- The Gap
- The Gatehouse

### Other Partners

- Aspire Oxfordshire
- Asylum Welcome
- The Porch-Steppin' Stone

## 6 Box Officer's Report

### Box Locations

#### Yellow boxes at:

- Tourist Information Centre
- St Michael at the North Gate shop
- Christchurch College Lodge,
- Oxford Union Bar
- Bunter's Delicatessen
- Phoenix Cinema
- Cowley Swimming pool
- Marston Ferry Sports Centre
- Linacre College,
- Magdalen College
- Quakers Shop,
- St Aloysius,
- Celebrations

#### Red Square Boxes at:

- Oxford Town Hall Reception
- Blackwells.
- Summertown M&S

#### Round Box at:

- Oxford Railway Station

Catherine and Francis King, Box Officers, February 2009

## 7 Donors

Darbys Solicitors LLP, St. Aloysius-The Oratory, St Michael at the Northgate, The Community of St. John Baptist at Begbroke , Concerts at St. Michael at The Northgate-Isis Orchestra Morris Chamber Group, CAF, Magdalen College MCR, Worcester College JCR, Carol Singing –West Oxford Primary School, St. Ebbe's School, NHS, Rose Hill Methodist Church, Society of Friends and many Private Donations.



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