



Oxford Poverty Action Trust

Annual Report

2013

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1 Chair's Report 2013

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 2012 brought the total raised to £298,000. 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. In 2013 W Lucy & Co made an exceptional donation of £15,000 which we used to create the W Lucy & Co Training Fund, which is described below. This was in addition to other donations they made in 2013 which became part of the general OxPAT funds.

Changes to the Trustees and Committee

In April 2013 Jenny O'Brien and Ralph Hall became trustees of OxPAT, while Marieke Clarke, Stephen Brown and Andrew Lack stood down. On the committee Deborah Ceadel stood down as chair, Jonathan Clark stood down as treasurer but took over as chair, and Jenny O'Brien became treasurer. Liz Storrar joined the committee. Sadly, Sue Gordon, who was a committee member, died in December 2013.

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 2014 calendar year: 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 will be 50% share Core Agencies, and the Church of God of Prophecy, Soup Kitchen, will also receive regular support.

We have, through Marieke Clarke, maintained contact with the Network of Homeless agencies through attendance at the quarterly meeting of the Single Homeless Group.

Our links with Oxford Students in 2013 were rather better than normal. Via OXHUB, the RAG committee and the Oxford University Conservative Association we had 36 student volunteers for our street collection day in May 2013, when we raised over £1,300.

We held our traditional carol singing before Christmas with children from St Barnabas Primary School. We also sang carols at Oxford Station with the help of the Appleton Community Choir.

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

We were delighted when W Lucy & Co contacted us asking if they could make a special donation to commemorate their 200th anniversary. We canvassed the network of Oxford charities dealing with the homeless for ideas as to how we could best use the donation, and we decided to establish the W Lucy & Co Training Fund. The fund will be used to support initiatives to help homeless people gain skills which will lead to the possibility of regular employment. In 2013 we spent the first tranche of £3,000 to enable six homeless people to take part in the successful National Open College Network (NOCN) Painting and Decorating Level 1 Award and Certificate courses, plus the Qi-Decorators (Qi meaning “balance of life”) work experience programme, which are based at Simon House.

Jonathan Clark Chair, March 2014

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 2013 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

Ralph Hall

Andrew Lack

Meg Movshon

Patrick Mulvihill

Jenny O'Brien

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 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 2013 were:

Chair: Deborah Ceadel and Jonathan Clark

Secretary: Meg Movshon

Treasurer: Jonathan Clark and Jenny O'Brien

Fundraising expenses during the year 2013 were: zero. The charity owns no functional property and there are no connected companies.

3. Finance

OxPAT Financial Report for 2013

OxPAT Accounts (figures in £)	2012	2013
Expenditure		
EXP-Admin Sub-Account	149.75	233.00
EXP-Grants – Charities	29,930.00	34,665.00
EXP-Grants – Individuals	1,240.00	1,322.50
Total Expenditure	31,319.75	36,220.50
Income		
INC – Boxes	1,723.95	1,922.15
INC - Fund Raising	1,180.18	1,758.95
INC – Organisations	7,506.30	23,477.35
INC - Places of Worship	7,315.41	3,395.39
INC - Private Donation (Gift Aid)	6,232.00	8,488.00
INC - Private Donation (Non-Gift Aid)	4,760.63	11,175.33
INC- Admin Sub-Account	100.00	0
INC- Bank Interest	0.73	13.43
INC- Inland Revenue (Gift Aid) Refund	1,478.88	0
Unknown	1,034.29	0
Total Income	31,332.37	50,230.60

Reconciliation with bank	2012	2013
Opening balance	1,842.47	1,855.09
Income	31,332.37	50,230.60
Expenditure	31,319.75	36,220.50
Closing balance	1,855.09	15,865.19

Income

Total income during the year was £50,230.60, compared with £31,332.37 in 2012. In the sixteen years OxPAT has been operating, we have collected almost £300,000 from our donors.

The big increase in income in 2013 is largely accounted for by a very generous donation from W Lucy and Co (included in income from organisations) to be spent over a period of three to five years. We have used this donation to establish a training fund for homeless and vulnerably housed people to help them find employment.

Our income is spread across various categories of donor. Box income showed a small increase from 2012, whilst income from fund raising increased by almost £600 due mainly to the Isis Chamber Orchestra donating the proceeds of a very enjoyable concert at St Michael at the Northgate.

Income from organisations (typically college JCRs and local businesses) increased by around £1,000, when Lucy's grant for the training fund is deducted. The 2012 figure for income from places of worship included a large donation for 2011 received at the beginning of 2012 so donations from this source in fact remained more or less the same in 2013.

Income from private donations, however, almost doubled. We received several large one-off donations from individuals and a fundraising dinner held at Oriel College in May raised £2,500.

The Inland Revenue gift aid refund of £1,852.76 had not been received at 31 December 2013 so will be shown in the accounts for 2014.

Expenditure

The total grants made by OxPAT in 2013 amounted to £35,987.50, an increase over 2011 of almost £5,000. £3,000 of the increase is accounted for by a grant to Simon House from the Lucy's training fund (included in EXP-Grants to Charities above) to enable six service users from other agencies across the homeless network to take part in a painting and decorating course and work experience programme based at Simon House.

As usual the bulk of OxPAT's income was donated to our core agencies, listed in the table above as "EXP-Grants – Charities". Grants to individuals (paid via various charities) were £1,322.50 last year, compared to £1,240 in 2012.

We had administration expenses of £233 which were mainly spent on the costs of reprinting the OxPAT brochure and other publicity materials.

Special purposes accounts

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

Special purposes account	2012	2013
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	2012	2013
Opening balance	437.14	387.39
Income	100.00	0
Expenditure	149.75	233.00
Closing balance	387.39	154.39

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.

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 2014

4 Grants Policy

In 2013 we amended our Grants Policy to the following.

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, nor 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 2013 were :

Simon House : part of A2 Dominion Housing Trust

Connection Floating Support Team (Oxford City)

Julian Housing: part of Oxford Homeless Pathways

O'Hanlon House

One Foot Forward

Elmore Community Services : support for people with complex needs

The Gatehouse : drop-in centre for over 25s

Steppin' Stone/The Porch : day centre

Two Saints: Lucy Faithfull House hostel

Aspire Oxfordshire Community Enterprise

The Church of God Soup Kitchen

Broadway

6 Box Officer's Report

Box Locations

Collection boxes at:

St Michael at the North Gate Shop , Christchurch College Lodge, 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 2014

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, St. Michael's and All Saints Charities St. Peter's Wolvercote, 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 generous Private Donations.

