

Oxford Poverty Action Trust

Annual Report

2005-2006

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1 Chair's Report 2005-2006

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.

In its first ten years, OxPAT has raised over £100,000, partly from collection boxes, partly from fund-raising events, but mostly from concerned citizens giving regularly by Gift-Aided bankers' orders.

Officers

There have been some changes in our Trustees and committee officers since the 2004-5 report. Penelope Ormerod and Anne Al-Abbas resigned as Trustees, and Marieke Clarke and Patrick Mulvihill were appointed as Trustees. Marieke also took over as Secretary from Jerome Bartram in April. Bishop Harries has retired and so is also no longer a Trustee nor a Patron.

Bhavan Sagoo's role of keeping the Committee in touch with our clients in her capacity as a front-line agency worker with English Churches Housing was passed on, in September 2006, to Daisy Quinn, also of English Churches Housing.

Meg Movshon joined the committee, and Gillian Atkinson resigned.

Overview

We have continued to hold monthly meetings (with the exception, this year, of

February and August) and put into practice our new Grants Policy. The following were successful in their applications to be Core Agencies for the 2006 calendar year: The Bridge / Gap; the Church of God of Prophecy Soup Kitchen; Connection Oxford; the Elmore Team; English Churches Housing Group; the Gatehouse; the Night Shelter. Agencies whose applications were not successful (Asylum Welcome, Bromford Housing, Julian Housing and the Porch) were encouraged to make individual applications as before, and in general this policy seems to have worked well.

During the year we had a very interesting presentation from PCs Paul Phillips and Tim Harding on rough sleepers. Either Bhavan Sagoo or Marieke Clarke attended meetings of the Network, and thus ensured we were kept more closely in touch with our client agencies. We also instigated a programme of visits to client agencies.

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: this year grants have been received from the Religious Society of Friends (Quakers), the Oxford Bus Company and Churches Together in Central Oxford.

Deborah Ceadel Chair, October 2006

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 2005 the following acted as Trustees of the Oxford Poverty Action Trust (known as OxPAT) for some or all of the time:

Anne Al-Abbas
Jerome Francis Antoninus Bertram
Stephen Brown
Deborah Jane Ceadel
Marieke Clarke
Bernard Jones

Andrew Lack
Patrick Mulvihill
Penelope Ormerod
Susanna Pressel

The Patron of the Trust is:
Hugo Brunner, Lord Lieutenant of Oxfordshire

Gross income during the year 2005 was £14043.23
Expenditure during the year 2005 was £15050.97

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

Officers during the year 2005 were:
Chair: Deborah Ceadel
Secretary: Jerome Bertram (till April 2006) Marieke Clarke (after April 2006)
Treasurer: Stephen Brown

The Independent Examination of the Accounts was carried out by: Jonathan Clark
Fundraising expenses during the year 2005 amounted to £0
The charity owns no functional property and there are no connected companies.

3 Financial Report

Distribution Account	2005
INCOME	
INC - Boxes	
Alders	£33.68
BHS	£9.65
Blackwells	£1,068.44
Bunters	£39.98
M&S, Summertown	£626.48
Oxunprint	£46.25
Phoenix Cinema	£21.74
Tourist Information Centre	£31.83
Town Hall	£168.80
Undesignated	£606.58
TOTAL INC - Boxes	£2,653.43
INC - Corporations	
Darbys Solicitors	£750.00
TOTAL INC - Corporations	£750.00
INC - Fund Raising	
Carol Singing - St Barnabas School	£89.68
Carol Singing -The Oratory	£174.04
Isis Chamber Orchestra	£130.00
Nominet Bring & Buy Sale	£151.00
Oxford Waterside Residents Association	£468.11
TOTAL INC - Fund Raising	£1,012.83
INC - Places of Worship	

Claydons Parochial Church Council	£100.00
Rose Hill Methodist	£75.00
Society of Friends	£28.74
St Aloysius - The Oratory	£1,185.81
St Michael at the Northgate	£62.39
St Stephens House	£200.00
TOTAL INC - Places of Worship	£1,651.94
INC - Private Donation (Gift Aid)	
Annual	£20.00
Monthly	£2,624.04
Occasional	£1,000.00
Quarterly	£800.00
TOTAL INC - Private Donation (Gift Aid)	£4,444.04
INC - Private Donation (Non-Gift Aid)	
Anonymous	£307.04
CAF	£945.00
Charities Trust	£154.47
Individual	£305.00
The Westward Trust	£200.00
TOTAL INC - Private Donation (Non-Gift Aid)	£1,911.51
Aid)	
INC- Admin Sub-Account	£436.23
INC- Bank Interest	£4.40
INC- Inland Revenue (Gift Aid) Refund	£1,178.85
TOTAL INCOME	£14,043.23

EXPENSES

EXP-Admin Sub-Account	
Bank Charges	£20.15
Maintenance	£184.00
Publicity	£286.23
TOTAL EXP-Admin Sub-Account	£490.38
EXP-Grants - Charities	
Church of God - Soup Kitchen	£1,200.00
Connection Oxford	£750.00
Crime Reduction Initiatives (CRI)	£1,000.00
Family Support (CRI)	£250.00
Oxford Homeless Medical Fund	£1,550.00
Oxford Night Shelter	£1,200.00
Street Services Team (CRI)	£250.00
The Elmore Team	£1,200.00
The Gap	£1,200.00
The Gatehouse	£750.00
TOTAL EXP-Grants - Charities	£9,350.00
EXP-Grants - Individuals	
Aspire Oxfordshire	£240.00
Asylum Welcome	£996.09
Churches Housing Trust	£1,782.50
Community Education Outreach	£100.00
Crime Reduction Initiatives (CRI)	£200.00
Julian Housing	£842.00
The Gatehouse	£600.00
The Knowl	£50.00

The Porch-Stepping Stones	£400.00
TOTAL EXP-Grants - Individuals	£5,210.59
TOTAL EXPENSES	£15,050.97
OVERALL TOTAL	-£1,007.74
RECONCILIATION WITH BANK	
Opening Balance	£2,219.76
INCOME	£14,043.23
EXPENDITURE	£15,050.97
Closing Balance	£1,212.02
ADMINISTRATION SUB-ACCOUNT (included within)	
Opening Balance	£135.77
INCOME	£436.23
EXPENDITURE	£490.38
Closing Balance	£81.62

Of the balance in the account £81.62 is Administration fund.

Money for administration received from:

The Religious Society of Friends (Quakers)
Oxford Bus Company
Churches Together in Central Oxford
Stagecoach

Treasurer's Report

In 2005 OxPAT raised £14043.23, almost identical to 2004 when we raised £13,906. Receipts from collection boxes more than doubled. We are particularly grateful to the customers and staff of Marks & Spencer, Summertown and Blackwells for their increased contributions. Contributions from Corporations have continued to decline; indeed we received just a single contribution from Darby's Solicitors. Receipts from Places of Worship have increased; we are particularly grateful to the congregation of St. Aloysius, The Oratory who have raised around £1200 again. Monies raised from Fundraising activities dropped from £2400 to just over £1000; this is more a reflection of less Carol Singing activities and the loss of a major donor this year. We remain very dependant upon individual personal donations which in 2005 totalled £6356 (2004 £ 6494). We wish to acknowledge our many regular (typically with Gift Aid) donors who provide the core backbone to our funding. The many anonymous donors, whether though CAF, Charities Trust or by anonymous cheques, should also be acknowledged. Similarly, we are unable to thank contributors to our collection boxes personally, but we are enormously grateful to them for their continuing support.

One of the philosophies that underpin our work is that 100% of all donations are re-directed to local causes whether as contributions to the Welfare Funds of designated homeless charities or though a sponsoring organisation to an individual for a specific need. However, although committee members cover most of administration costs personally, we do incur costs related to maintaining and repairing collection boxes and printing publicity material. In 2005 we spent £490; however we are grateful to Oxford City Council who contributed £286 (directly to cover costs of new posters),

Oxford Bus Company (£50), and the Society of Friends (£100) respectively for contributing specifically to our Administration sub-fund. We continue to seek further donations for administration.

In 2005 over £15,050 was distributed. Over 60% was funnelled directly to our key 'designated' charities, with the balance for individual beneficiaries through an application made by a sponsoring organisation. The Churches Housing Trust received the most grants for its clients.

This is my first report as Treasurer and I would like to pay particular thanks to Andrew Lack for handing over to me a very efficient system and offering such helpful advice. We continue to distribute funds as soon as is reasonably possible and always attempt to keep the minimum working bank balance. I am also grateful to Jonathan Clark, who has scrutinised these accounts for the first time. His attention to detail is appreciated and I am pleased to announce that he confirmed them to be correct. Finally, it is with great pleasure I can announce that sometime in 2006 a grand total in excess of £100,000 will have been raised by OxPAT since inception.

Stephen Brown, Treasurer
25th September 2006

4 OxPAT Grant Policy

Core Principles

1. OxPAT funds are to be used to provide direct help to homeless or vulnerably housed adults - eg 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

1 Core Agencies

OxPAT will aim to distribute 80% of its funds to a core group of around 8 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.

It is intended that this will avoid the need for those agencies to make specific applications for funds.

The make-up of the core group will be revised each autumn for the next calendar year (or more often if circumstances make this appropriate). The Network of Homelessness Agencies will be invited to put forward suggestions.

2 Specific applications

Approximately 20% of OxPAT's funds will be used to fund specific applications which

are not from the 8 core agencies. These will usually be a maximum of £100 each.

These must:

- a) be made through a recognised charitable agency
- b) be supported by a case worker
- c) be in writing (including fax or e-mail)
- d) specify how much is required, what it is required for, and why it is needed
- e) include the name, address and bank details of the agency supporting the application
- f) give details of any other applications which have been made, or are going to be made, to any other funding body towards the same item.

3 Applications should be sent to: Marieke Clarke (Grants Officer)
mariekeclarke@pop3.poptel.org.uk or c/o OXPAT, 25 Woodstock Road, Oxford, OX2 6HA
Fax 310470

If a grant is made, it is the agency's responsibility to ensure that the money is not given to the applicant but is spent under the supervision of a caseworker and for the purpose for which it was requested. If it is no longer required for that purpose (eg because funds have become available from another source) it is the responsibility of the agency to ensure the money is returned to OxPAT.

4 Meetings

OxPAT holds 12 meetings a year (on the second Friday of each month) at which specific applications will be considered.

Dates for the remainder of 2006 and for 2007 are as follows

13 October 2006
10 November 2006
8 December 2006
12 January 2007
9 February 2007
9 March 2007
13 April 2007
11 May 2007
8 June 2007
13 July 2007
10 August 2007
14 September 2007
12 October 2007
9 November 2007
14 December 2007

5 Partners

Core agencies from January 2006

The Bridge/Gap
Church of God Soup Kitchen
Connection Oxford
Elmore Team
English Churches Housing Group

The Gatehouse
Oxford Night Shelter

Other partners

Aspire
Asylum Welcome
Oxford Homeless Medical Fund
Julian Housing
Simon House
The Knowl

6 Boxes

Box Locations

Blackwells, Marks & Spencer Summertown, BHS, Oxford Town Hall, Phoenix Cinema, Bunters, Alders, Oxunprint, Tourist Information Centre are the locations of the largest boxes.

7 Donors

Donors

Darbys Solicitors, Oxford Waterside Residents Association, The Oxford Union Society, St. Aloysius – the Oratory, St. Michael at the North Gate, Society of Friends, Claydons Parochial Church Council, Rose Hill Methodist, Carol singing – St. Barnabas School, Carol Singing – St. Aloysius, Isis Orchestra, Nominet Bring and buy Sale, St. Stephen’s House, CAF, The Westward Trust, Private donors.

OxPAT AL/ DC/SB/MC/BJ/PM250906