

Oaklea

Supporting stronger communities

ANNUAL REPORT 2020



BE KIND

BE PART OF THE TEAM

BE INNOVATIVE

BE FOCUSED

BE PRODUCTIVE

BE RESPECTFUL

BE RESOURCEFUL

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CEO Update

If someone had said to me that we would have to furlough and isolate employees, insist that we work within bubbles, limit the number of learners at Right2Work, working socially distant from one another, and wear full PPE in supporting roles and masks when going into the office, I would have thought it a bad dream that could never happen. This is the new reality.

How would we cope? Would we be able to continue to provide high quality support? What sort of financial shape would we be in?

The answer to these questions is that we have more than coped continuing with business in an innovative and flexible way. This has been down to the excellent work of each individual employee, as well as the efforts and resolve of our customers and learners. Well done to everyone.

This year we were due to hold our 30-year celebration event but unfortunately this could not take place due to current restrictions. However, we are planning to hold the event in the Summer of 2021, and this will give us the opportunity to focus on the efforts and achievements of employees and customers/learners. Look out for more information in the near future.

I am delighted to welcome some new customers with the opening of two new Supported Living projects within our Kendal and Furness divisions. Community Works, part of Right2Work, has continued to go from strength to strength, having just completed a major contract to renovate changing facilities for

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a football club and due to business growth has recently recruited new employees. The Hub in Appleby has now re-opened and its café is welcoming customers to the same level as pre-Covid.

Some of the social media illustrating our customer/learner achievements during the year has been inspiring and thank you to everyone for making people's lives so full and worthwhile. We truly are working to the Seven Keys to Citizenship and our workplace behaviours, the top of which for me is to be kind, and that comes over loud and clear from the information and stories of people's achievements that I have the privilege to see.

Despite this difficult time, we have been able to drive forward some new initiatives including training twelve employees in Mental Health First Aid, giving us an in-house resource to support



our employees across both companies if they struggle in this area. Also, we have been able to develop an Apprentice Academy linked with a local college, allowing us to help develop candidates' experience working in our sector.

Both Oaklea and Right2Work remain healthy organisations and as a group we have been able to complete the year end in 2020 with a working surplus, allowing us to weather the storm and continue with our development programme.

I would like to say a huge thank you to all of our employees, volunteers, customers and learners for your support and dedication over this past year. I hope to see many of you at the celebration event next Summer, and when I am able to re-commence visits when the current restrictions allow.

Take care

Clive Wigley (CEO)



*CEO Clive Wigley (right) with
new Chair Andy Scott*

Chair's Welcome

This is my first welcome for the Oaklea Annual Report having taken over as Chair from Cate Grimes during this period. I have to say that Cate left a very big pair of shoes to fill, but I hope that I have been able to step up to the mark even though this has been a challenging time during the Covid outbreak.

I would like to take this opportunity to recognise all of our new Trustees that joined in 2019, to welcome Susie, John, Stuart, Maxine, Nigel and Chris R. You are an asset to the organisation and you bring a breadth of knowledge that compliments our longer standing Trustees of Linda, Michael, Susan and Chris H. All of whom have made our new Trustees feel very welcome.

It has been a challenging year with its own unique set of frustrations including operating restrictions imposed by adherence to Covid 19 government guidelines. One of the big disappointments for me and my fellow Trustees is that we have not been able to visit our employees and customers as part of the internal quality audit process. This is always a highlight allowing us to hear about all of the great work going on with our customers first hand.

I was impressed that employees took on different roles within the organization to help distribute food and medication. I also saw the diversification of the work at the Appleby Hub to deliver meals to isolated local people; the way that our care teams continued to offer care and support despite being concerned for their own

safety; and the way that office based employees were flexible and responsive to contingency planning. I also note the resolve of our customers and learners and the way they have supported their communities and one another. It has been a joy to see the individual posts and stories that have been shared. The Board is proud of you.

Whenever there is a major crisis such as Covid, our Executive Team pull together a Business Continuity Meeting, and part of my job as Chair is to join this group. I have been so impressed by the way the Executive have looked quickly at the risks during such a crisis and mitigated each one. It has been eye opening to be part of this and reassuring to know the management of our organisation is in good hands.

I know we are all getting used to a new way of working, Trustees have now got to grips with Zoom meetings, a very strange concept at first. It is quite remarkable that during this time Oaklea and its subsidiary Right2Work have remained financially strong, we have developed new projects, and a number of new colleagues have joined us.

Well done to you all and I look forward to doing next year's report when hopefully things will be somewhat more settled.

Andy Scott (Chair)



Andy on a site visit 2019 to The Furniture Warehouse



BE RESOURCEFUL
Supporting stronger communities

Business Objectives 2019-2020

Engaging with Beneficiaries

(Individuals & Communities)

- We grew our supported living projects within Northumberland & County Durham by working with Commissioners to do bespoke work and responding to tender opportunities.
- We launched innovative projects in partnership with stakeholders and beneficiaries within Cumbria & County Durham. Including additional needs framework, supported living framework, 'helping hand' project within Right2Work, learning to live project, respite framework.
- Complete the transformation of our Adult Care Home within Lowther Park, Kendal to better meet customer needs and financial sustainability – de registration was completed at the end of November 2019.
- Respond to unique unmet need for supported living that meets the needs of our beneficiaries - Rakehead Cottages, Ulverston.
- 7 Keys to Citizenship (*top, far right*) implemented and embedded throughout organisation including through Internal Quality Audit.
- We developed and implemented the strategy for work with children and young people. New CYP programme launched early 2020.

Children & Young People programme brochure >





BE PRODUCTIVE

Customer AI from Ulverston always likes to get involved and help out

Right2Work

R2W is a growing and thriving organization that carries out an increasingly diverse range of activities to people within local communities. They are a Community Interest Company (CIC) and a subsidiary of Oaklea Group.

The strategic focus of Right2Work:

- Community
- Well-being
- Learning

The Furniture Warehouse & Community Works

- Running at full capacity for learners.
- The Furniture Warehouse diverted 135 tonnes from landfill which is an increase of 5 tonnes from the previous year.
- The objective for 2019 was to introduce a new social enterprise that focused on skills development within property and grounds maintenance and in June 2019 we introduced Community Works to the Right2Work offer.

Appleby Hub

The Hub operates a Day Service on behalf of Cumbria County Council, although most individuals who attend are privately funded. A final piece of development in early 2020 was established under the Appleby Hub, this was The Eden Workshop.

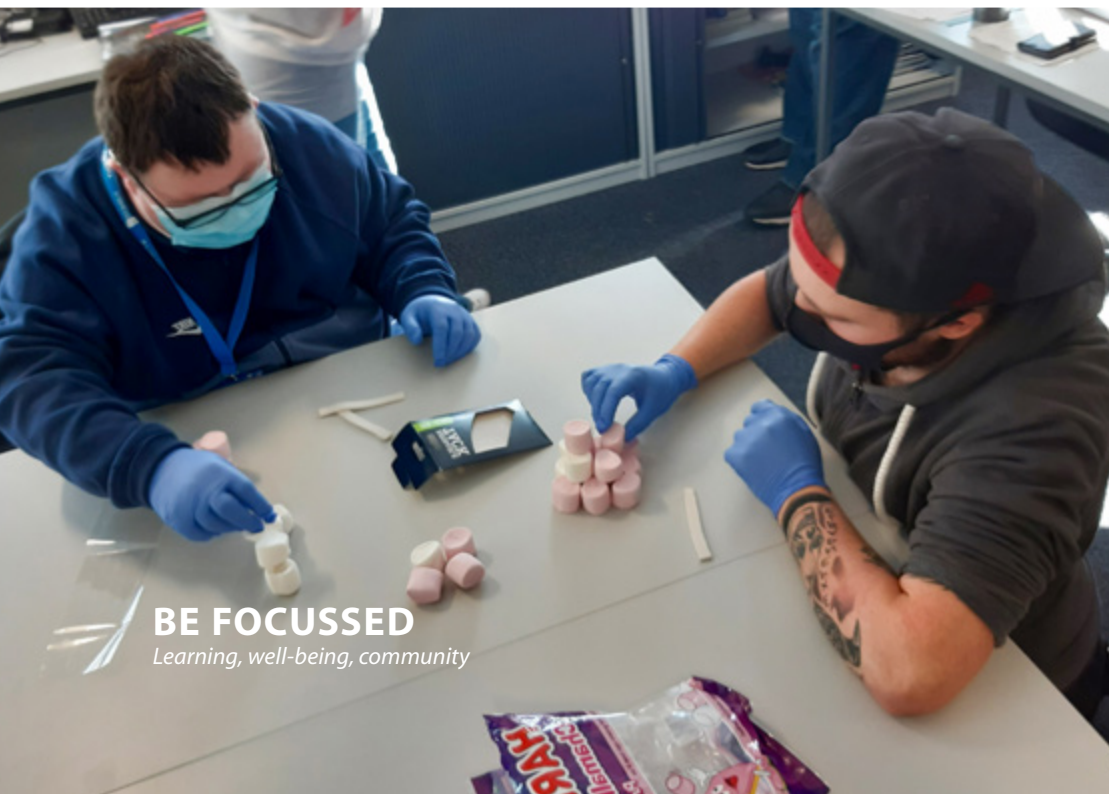
Work & Learn

- The Work and Learn Team have also achieved significant milestones. During the 2019/20 academic year the team supported 14 learners who are in the process of completing their Supported Internships across 3 districts within Cumbria. All the learners are young people with Education, Health & Care Plans who are ready to leave the college environment and want to progress into the world of work.
- Building Better Opportunities (BBO) aims to help those furthest away from employment to move closer to the world of work. It is delivered in partnership with Cumbria CVS and is funded by the



Community Lottery Fund and the European Social Fund. The Work & Learn Team have worked with 89 participants, of which 33 have progressed into paid employment, 5 are working in a voluntary setting and 5 have returned to further education and training.

- Journey2Work - This is delivered in partnership with G4S and is funded by The Department for Work and Pensions and the European Social Fund. This project aims to assist people with perceived barriers back into employment. The Team have worked to-date with 263 job seekers of which 61 have secured employment, 51 of these have gone on to stay in employment after 13 weeks and of the 51, 46 job seekers have stayed in their jobs for over 6 months following our support, advice and guidance. In this year (April 2019 to March 2020) the Team achieved 34 starts and 28 new job starts were achieved, 30 short term outcomes (13-week outcomes) 28 sustained job outcomes (26-week outcomes). A start is a new customer/referral. A job start is someone who has started in a job.



Stakeholder Survey

Stakeholder Survey 2019

The annual stakeholder survey was conducted online only and sent to 240 partners and stakeholders (they include Healthcare, Education & Training, activity providers, Local Authorities, Housing Associations etc).

YEAR	TOTAL SURVEYS SENT	RESPONSE	RESPONSE %
2016	40	12	30%
2017	171	55	32%
2018	204	37	18%
2019	240	57	23.7%

2019 Stakeholder survey ran 23 January to 14 February 2020. (Year on year we are reaching more people with the survey).

Employing Quality People

Develop a transparent succession planning programme to develop aspiring employees, maximising value from the Apprentice Levy.

How have we done this?

Team structures have evolved through growth and organic changes

- Smaller teams for supervision of employees
- More Team Supervisor posts
- Head of Care and Deputy Head of Care Roles
- Increased use of apprentice levy
- Investment in Chartered Personnel Department (CPD) for employees
- Introduction of apprentice academy
- Roll out a well-being strategy across the organisation

Summary of some of the results

Q1 Would you describe the work we do as high quality which meets needs?

YES 98.25%

Q2 Is it easy to communicate with us?

YES 98.25%

Q3 Do our people (employees/volunteers) do a good job?

YES 100%

Q4 Is your overall experience of working with us a positive one?

YES 98.25%

Q5 Please describe what you think is the best thing about our organisation?

"Very good organisation with people who work really hard and care a lot about the causes"

"Receptive to change and new ways of working"

"Willingness to work in partnership"

Q6 If there's anything we could do differently -what would it be?

"We can't think of anything we can suggest for you to do differently because we are very happy with the working relationship we are building."

"We've just started to work with you - our experience to date has been very positive"

"Find a way to recruit more volunteers, though I understand that that requires people's time to train them."





BE INNOVATIVE
*Meeting needs of our learners -
R2W South Lakes Employment team
socially distant but never far away*

Finance & Future Development 2020-21

Ensuring Adequate Financial Resources

Our current management accounts and year end forecasts show both Oaklea and Right2Work exceeding our budget expectations.

In the last year we planned to implement our fundraising and marketing strategy and we have successfully increased awareness of the Charity online and in social media and local press. Our fundraising for specific projects has also been successful.

Extract from Oaklea Trust Financial Statement year ending 31st March 2020

Income	
Donations	71,054
Grants	25,280
Fundraising Events	1010
Interest Received	343
Charitable Activities	7,061,614
Total Income	7,159,301
Expenditure	
Staff and related expenditure	6,350,764
Property and estate costs	319,459
Professional and Legal Fees	56,750
Other Overheads	284,900
Financing Costs	13,465
IT expenditure	76,815
Total Expenditure	7,102,153
Surplus	57,148

For every £100 of income here's what we spent it on in 2019/20

Staff and related expenditure	£89.42
Property and estate costs	£4.50
Professional and Legal Fees	£0.80
Other Overheads	£4.01
Financing Costs	£0.19
IT expenditure	£1.08
Total Expenditure	£100.00

The income achieved for the year was £7,159,301, an increase of 1.8% over 2018/19.

National Minimum Wage and pension cost increases led to costs of £7,102,153, an increase of 1.2% over 2018/19. Once again all our teams have worked hard to manage costs in a challenging economic environment.

The overall result was a surplus of £57,148, an increase of £47,033 compared to 2018/19.

As a people focussed charity the Oaklea Trust recognises that employees are our most valuable asset.

Thus for every £100 of income received, £89.42 is spent on employees and employee related costs.

Oaklea and R2W Future Plans & Developments 2020-21

Some of these include:

- L2L (Learning2Live) - Deliver the opening of L2L new programme by September 2021 or sooner.
- PBS (Positive Behaviour Support) - Apply the practice of PBS in a targeted way and monitor and review its impact.
- iPlanit customer and employee management tool - Roll out the new software system iPlanit in the North East.
- Children & Young People Team - Roll out of new work from our Children & Young People's Team including Community Learning and Youth Futures Project.
- Develop a methodology for how we measure our social impact and impact on communities.
- Implement actions of our home working survey during Covid-19 in support of employees working at home as well as our wider teams.
- Introduce an Employability Award methodology to demonstrate the transferable skills of our learners.

Learning2Live

> a project that combines learning and a place to live





Head Office The Oaklea Trust, Second Floor, East Wing,
Station House, Station Road, Kendal, Cumbria LA9 6RY

Telephone 01539 735 025





Email enquiries@oakleatrust.co.uk

Websites www.oakleatrust.co.uk www.right2work.co.uk

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