



ALTOGETHER NOW

Annual Report 2019

www.oakleatrust.co.uk

Oaklea supports the Riversiders Trust to enjoy an adventure packed break above Derwentwater



CONTENTS

04	CEO Update	10	Right2Work Update	18	Future Plans and New Developments
05	Chair's Welcome	12	Ensuring Adequate Financial Resources	20	Contact
06	Oaklea Strategy				
07	7 Keys to Citizenship	14	Empowering and Employing Quality People		
08	Engaging with Beneficiaries				



Grand day out at Warton Stock Car racing

2018-19 was a good year for the Oaklea Group, full of change and project development.

We welcomed new employees and Board members, planned to move Head Office, plan to move Appleby Hub to our subsidiary Right2Work, started fundraising for #ProjectEdenside, whilst building partnerships that will have a lasting and positive impact on our charitable work.

We're proud to be working with a wide range of dedicated, skilled and caring employees delivering our new approach of 7 keys to citizenship. From Government through to local authorities, there's a genuine groundswell to improve social care and seeing an end to austerity.

We are optimistic that funding for our sector will improve driving up quality and expanding the offer that we can make to our customers and learners.

We have learnt over the years that we need to be able to respond to the changing needs of customers and communities. We have achieved this through working with a range of funders on new initiatives such

as Community Works, our new community based enterprise (launched May 2019) that provides a supported vocational environment in the property maintenance sector for up to 40 learners with learning disabilities.

We have also enabled four young people with learning disabilities to move into their new home in Cumbria.

We are developing exciting new plans for 2019-20 which involve expanding and developing our work with children and young people and pushing forward on a new opportunity called Learning

to Live which combines purpose built accommodation with life skills tutors and support into education and employment (2021 start date).

Within the annual report you will also find information on fundraising, employee engagement, the work of our ECG (Employee Consultative Group) and how our new workplace value "we believe in kindness" actually makes a difference.

Clive Wigley

CEO



CHAIR'S WELCOME

**This is my
third, and last,
introduction**

**to the Annual Report in my role as
Chair. I have been involved with
Oaklea for 17 years as a Trustee,
Vice Chair and latterly as Chair.**

During this time I have seen the Charity grow and expand its operations across the North of England as it responds to the demands and changes of the market in which it operates.

I am incredibly proud of what we do and of the people who work and volunteer in our organisation. None of our achievements would be possible without the energy and commitment of our people.

The vision of Oaklea Trust is that every citizen has a positive contribution to make to society and the right to control their own lives. The mission to support disabled and disadvantaged people towards independence through choice and inclusion, provides the overarching steer by which the organisation achieves this vision.

During 2018/19 plans were

being developed for Extra Care Housing in Appleby which would complement the presence of Oaklea Trust in the Appleby community by providing much needed accommodation, support and care for the elderly in Appleby and the surrounding Eden Valley. We have received a number of donations including Appleby Rotary Club, the Peter Norben Trust and several of our employees and many members of the community are undertaking fund raising activities

The Hub at Appleby has continued to be a success story for Oaklea. Sessional hire levels are high, space is being used to capacity and the café continues to be a success. 6 of our Learners also qualified in Food Hygiene during the year.

We continue to support a number of groups and activities, bringing people together (Riversiders & Golden Moments are very popular with those who attend).

We were chosen as a beneficiary of the Torchlight Procession in Kendal and several of our customers took part in the parade. It is always a very popular event and helped to raise the profile of Oaklea.

Several of our Supported Living Services underwent inspections during the year with Garth Brow and the North East

Supported Living/Domiciliary Care Work being rated as 'good' by the Care Quality Commission. Durham County Council (DCC) also inspected the Supported Living service in County Durham and the Team were given a 'good' result with DCC commending the teams for their care and support of our customers.

We continue to review the efficiency and effectiveness of the organisation and during the year have worked on implementing a new electronic system for managing customer data including My Life, My Choices, known as iPlanit.

We also reviewed and changed our payroll provider and tested the market through a procurement exercise. We will continue to do this for services we buy in which support the running of the organisation.

I would like to thank all our employees across the Oaklea Group who continue to support our customers in achieving independence and involvement in their local communities. I wish Oaklea and its employees all the very best for the future.

Cate Grimes

Chair

OAKLEA STRATEGY

The Oaklea Strategy is to achieve our Mission, focussing on the regions of northern England.

We will achieve this through engaging with our beneficiaries, managing financial resources and employing quality people to do the job. This is a five year strategy made in 2017 with the measures of success being reviewed annually.



7 KEYS TO CITIZENSHIP

The Oaklea Trust is a registered charity with its purpose to support individuals and communities in need. How do we do that at Oaklea?

Moving Away from an Outcome Culture and Embracing Citizenship

Sue Green, Director, Oaklea Trust

"There are often times when organisations change, evolve and embrace new directions. Oaklea Group have always been able to embrace such change quickly and as a result have always had a positive impact on the lives of our customers and learners."



Seven keys to citizenship

We are making a change that moves us a step away from an outcome culture to one that embraces the principles of Citizenship. This is to reflect how the social model of disability has moved on and how it is as important to give as it is to receive in a society.

There are seven keys to citizenship and they are universal, i.e. applicable to all.

An example of help & love comes via an individual that Oaklea supports. Due to a health condition, he has been very reliant on a local paramedic team and wanted to 'give something back'.

He arranged with his Oaklea team member to ask NHS colleagues how he could offer a gesture of kindness. Subsequently he has purchased for them bundles of goodies which they can enjoy in between their calls."



ENGAGE WITH BENEFICIARIES

1 Sue Millington, Team Manager, Yealand Drive, Ulverston.

"All the staff want each of the customers to experience life to the full, we want

to offer the opportunity to enhance skills, promote independence and encourage a positive outlook to life."

2 Lorraine – parent of young person who attends Oaklea activities.

"These activities are great for socialising with other kids and brings out some lovely moments you wouldn't otherwise get.

It's about being together and as



adults for us to step back a bit and let the young people enjoy themselves.

They've probably made friends for life and this builds foundations and the social skills for life - far better than being stuck inside in front of a computer!"



3 Employee Karen Kidd talking about a highly successful group residential trip to the Calvert Trust in Keswick in Winter 2018/19.

"Some members said they didn't want to do stuff - yet within 5 minutes they were up for it and tried out all kinds of activities -well beyond their comfort zones.

It was a really inspiring weekend - a great time to bond and sometimes it got a bit emotional at how brave some of the club members were."



RIGHT 2 WORK UPDATE

Right2Work C.I.C (R2W) is a subsidiary of Oaklea Group and is a social enterprise.
R2W produces its own Annual Report – available on their website www.right2work.org.uk.



R2W achievements 2018-19

- 130 tonnes diverted from landfill
- 74% of bulky waste collected was reused or recycled
- 293 learners gained new skills
- 57 individuals now in paid employment with our support



COMMUNITY WORKS



Community Works provides a supported vocational environment for people with learning disabilities.

Our learners will work towards a 'preparation for life and work' entry-level certificate. It will operate through South Lakes, the Eden Valley & North Lancashire.



ENSURING ADEQUATE FINANCIAL RESOURCES

Extract from Oaklea Trust Financial Statement year ending 31st March 2019

Income & Expenditure

Total Income	£7,030,056
Total Expenditure	£7,019,941
Surplus	£10,115

The income achieved for the year was just over £7million, a slight increase on the previous year. Despite increases in National Minimum Wage and pension costs, the expenditure for the year was maintained at £7million.

The overall result being a surplus of £10,115, this is a very encouraging result given the economic environment and we recognise the hard work of all teams in managing costs effectively.

For every £100 of income received the Oaklea Trust spends almost £89 on staff and payroll related costs. This is clearly a big investment and is a testament to how people focussed we are at Oaklea.

For every £100 of income here's what we spent it on in 2018/19

Staff and Related Expenditure	£88.99
Property and Estate Costs	£4.80
Professional and Legal Fees	£1.22
Other Overheads	£3.83
Financing Costs	£0.22
IT Expenditure	£0.94
Total Expenditure	£100.00





Nick & Hazel Wardle viewing the Fundraising Tree –they happened to drop by as a ‘thank you’ note for them was placed on the tree.

FUNDRAISING

#ProjectEdenside

The biggest fundraising challenge Oaklea has ever taken on is the need to raise £250k to help deliver our plans to transform the former Edenside care home in Appleby, Cumbria.

Oaklea purchased the property in December 2018 – with the aim to provide Extra Care Housing for local elderly people.

Fundraising has been very much community led and this has been reflected in our Fundraising Tree which is a centrepiece at the nearby Appleby Hub. People have started to get involved through sponsored runs, charity nights and music concerts to name just a few. The Mayor of Appleby has adopted #ProjectEdenside as her chosen charity. This has led to 50+ businesses taking bespoke donation tins.

A dedicated web page...

www.oakleatrust.co.uk/what-we-do/project-edenside

and Facebook site...

www.facebook.com/ProjectEdenside/

are now set up to communicate and engage with people wanting to get involved.

A database of supporters and those interested in registering for a place have also now been established.



Appleby Smarter volunteers have been looking after the grounds at Edenside



Keeping people informed - first public meeting held on 7 January at the Appleby Hub

EMPOWERING AND EMPLOYING QUALITY PEOPLE

The Oaklea Employee Survey took place in 2018. The next survey will take place March 2020. The 2018 survey involved 376 surveys being sent out with 135 responses received.

EMPLOYEE SURVEY 2018

Q1. I am able to improve the quality of life for individuals and communities in need, due to:

- 38.06% Having skills to do the job
- 37.31% Having a good understanding of customers/colleagues needs
- 13.44% Personal commitment to helping others
- 1.19% The training I am offered to carry out my role

Q2. I feel I am part of an organisation that listens and responds because:

- 35.77% I am able to develop my ideas to support the work I do
- 31.77% I feel valued because my employer gives me feedback
- 18.70% My ideas have been listened to
- 3.82% My viewpoint has been listened to and I have been given a full response

Q3. The main reason I make a positive impact in my work is because:

- 58.96% I have a good rapport with colleagues and or customers
- 21.63% I receive positive feedback for the work I do
- 14.93% Customers reach their goals and aspirations
- 4.48% My P&A (Performance & Achievement) objectives have a positive impact on the work I do

Q4. I utilise my ECG* rep to:

- 35.38% I don't access my ECG rep
- 24.62% To voice my views
- 20.77% I don't know who my ECG rep is
- 1.54% For feedback from ECG minutes
- 7.69% Share new ideas

*see P16 for explanation of ECG

Employee Survey 2018 actions;

- Increase employee engagement through productivity & succession planning
- Increase teams with bank Lifestyle Co-ordinators through recruitment & selection



- Review pay for employees for 2020/2021
- Fundraising involvement for customers & employees



CUSTOMER & STAKEHOLDER SURVEY

An example question - Is your overall experience of working with us a positive one – YES 97.3%

The annual review in our “Customer & Stakeholder Evaluation Feedback 2018” gives an idea of where we are with regards the view of people we support.

This year’s theme being “continuing to listen to our customers and always looking at improving the services we provide.”

You can ask us for a hard copy or download it from our website www.oakleatrust.co.uk/about-us/the-oaklea-vision



Customer & Stakeholder Evaluation Feedback 2018

Continuing to listen to our customers and always looking at improving the services we provide



EMPOWERING AND EMPLOYING QUALITY PEOPLE

APPRENTICE LEVY

A number of employees are benefiting from our Apprentice Levy funds.

Focus has been on succession planning of Team Supervisors enabling them to complete their Level 2 Team Leading Diploma with local training providers such as Kendal College, Derwentside College and GP Strategies. Team Managers have all either completed or are working towards Level 5 Diploma in Care & Management.

INVESTORS IN PEOPLE ACCREDITATION 2018



Oaklea maintained Investors in People (IIP) accreditation in August 2018.

Overview of findings:

'Growth of innovative services – Right2Work & Appleby Hub



Employee Consultative Group – with a presentation from Cumbria CVS on Chairing meetings

All supported by consistent people practices, well developed HR function, pride at all levels from employees through strong employee survey responses

In many cases practices are in line with higher performance levels within the Investors in People Framework

Some areas of development

- *Enhance regular two way communications of key messages important for collective buy-in*
- *Publicising of employee benefits*
- *Career development/succession planning to at least cover critical posts and develop talent to fill key*

posts in new initiatives or services

- *Have some informal “champion” roles to ensure that all ideas are harnessed in all locations*

EMPLOYEE CONSULTATIVE GROUP (ECG)

The ECG meet 4 times a year at the Appleby Hub and representatives from Oaklea and Right2Work attend.

Employee representatives share ideas, customer success stories, issues arising and problem solving.

ECG reps have been involved with health and safety updates, policy

reviews, fundraising ideas and also attended a team training session on successful meetings, which was facilitated by Cumbria CVS.

ECG has grown from strength to strength over the past 12 months welcoming new reps from around Oaklea/R2W.

POSITIVE BEHAVIOUR

The Positive Behaviour Support (PBS) programme is in full flow across Oaklea.

It's all about increasing understanding of the behaviour of an individual - assessing their physical and social environment and the impact this can have on a healthy and fulfilling life.

HR Manager, Helen Shaw; "We are also supporting four employees currently undertaking the PBS level four programme. We currently have fifteen employees beginning the enrolment process for the next university intake.

North East based Mark Crawley has expressed how much of a positive experience and hard work the course has been. It has promoted personal, service wide and organisational wide reflection on the service offered to customers.

It aims to enhance quality of life as both an intervention and outcome, using a values-led approach."

EMPLOYEE AWARDS



Melissa with CEO, Clive



L-R, Vanessa, Emma, Becky, Liam and Carol

Keeping Calm & Carrying On **Liam Hughes**

"Liam has to deal with stressful situations, and he always steps up to the role. He handles these situations in a calm and productive manner."

Innovation & Best Practice **Becky Barnard**

"Becky is always striving to give her customers the best possible opportunities. The majority are young adults and whenever I see the customers they are lively, happy and enjoying life!"

Exceeding Expectations **Emma Wilson**

"For dealing with challenges when faced with recruitment challenges."

Increasing Quality of Life **Carol Mounsey**

"Our customers can always rely on Carol - she also provides companionship - this is extremely important to the customer group she supports, Carol may be the only person the customer sees all day. "

Charitable/Community Work **Vanessa Washington**

"Vanessa organised a great coffee afternoon for Garth Brow and Lowther Park. Vanessa has also supported one of Oaklea's customers at the Kendal Torchlight Parade, which was a huge success."

Customer Choice **Melissa Young R2W**

"Giving support to new and current R2W customers."

FUTURE PLANS AND NEW DEVELOPMENTS

The Oaklea Trust expects that the external environment will continue to provide financial challenges with national minimum wage set to rise again in the near future and continued uncertainty around the classification of sleep-in's.

In response to these issues Oaklea Trust plan to carefully grow existing high quality services and further develop in the areas around young people transitioning into adulthood, children & young people and community based work while at the same time controlling costs to ensure financial sustainability.

The Oaklea Trust have been successful in the year with regard a framework to support individuals with Learning Disability, Autism and Additional Needs in Cumbria and a new framework to support people with Learning Disabilities or Mental Health Needs in Durham. New activity from these two frameworks is expected in the coming year. An additional supported living project for young adults in South Lakeland is also planned.

Development work continues with

The Trustees believe that in order to achieve its objectives in the longer term, the Oaklea Trust needs to ensure financial sustainability alongside steady growth.



Flyer for new property maintenance project, Community Works

a project to support young people transitioning to adulthood, providing an alternative to college combining life skills, home management and vocational training and employment outcomes. The

Children and Youth Team are developing ideas for growth in their area focussing on supporting children and their families.

Alongside these growth opportunities and new innovative developments is the Edenside project. This is a longer term project, which if planning consultations are successful, could take up to a further two years in development.

Right2Work CIC is continuing to grow with the launch of a property maintenance project "Community Works" in 2019. This will contribute to all three strategic areas by supporting organisations in the community with their property maintenance needs, providing learning opportunities with apprenticeships and training and contributing towards well-being through job creation and the positive impact of employment and meaningful work.

The Directors of Right2Work and the Trustees of The Oaklea Trust have also approved the transfer of the work of The Appleby Hub to Right2Work effective from 1st April 2019. This provides the opportunity

for Right2Work to grow the reach of The Hub and expand the community development activity undertaken there.

The Hub Cafe provides learning opportunities for individuals and the diverse range of activities at the Hub contributes towards community cohesion and social responsibility.

The Employment Team have received such positive outcomes and feedback from the pioneering Supported Internship project that it intends to expand the reach of this project and move towards providing Supported Internships independently of the college environment.



Getting crafty at The Appleby Hub



Time out in Ferryhill, Co Durham



Looking to the future

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

Telephone 01539 735 025

Email enquiries@oakleatrust.co.uk

Website www.oakleatrust.co.uk

Registered Charity No. 1091722
Company No. 4416344

FOLLOW US

 facebook.com/oakleatrust

 twitter.com/oakleatrust

 instagram.com/oakleatrust

 linkedin.com/oakleatrust

right2work
part of the Oaklea Group

FORBES
CHARITABLE
FOUNDATION

CUMBRIA
COMMUNITY FOUNDATION

Cumbria
Fire and Rescue
Authority

Durham
County Council

Northumberland
Council

WATCORE
IN PEOPLE
Accredited

CHAS
ACCREDITED

disability
confident
Trustmark



Walby Hill Registered Manager Ruth Hall with customer Margaret at North Berwick Beach – her wish was to dip her toes in the sea so the team arranged for a special wheelchair