



Learn » Develop » Thrive



Oaklea

Supporting stronger communities

**ANNUAL
REPORT**

2022

View from the Chair

This is my first introduction to the Annual Report, and I am delighted to report the Oaklea Group is in fine shape.

Despite some sad losses, we have come through the Covid pandemic remarkably well and we can now look forward to a healthy future as one of the leading charities in the North of England. In no small way this is down to the dedication and sheer hard work shown by our employees to whom I am immensely grateful.

As part of the “looking forward” process, the Boards of Oaklea Trust and Right2Work came together in May to sign off the new five-year Group Strategic Plan for 2023-2028. We look forward to this work being delivered through our new Business Plan, under the leadership of our CEO, Clive, and the Senior Management Team. Our Vision (our goal in five years) is to *“deliver the finest opportunities in the kindest possible way... to support and care for people and communities so they can learn, develop, and thrive”*. A noble goal indeed and one I know we will deliver.

To help us on this journey, we welcome some new trustees who have joined the Board recently. Dr Robin Talbot, Derek Ridgway and Dr Colin Mitchell bring with them a wealth of professional experience working with charities and I know that you will make them feel welcome as they settle into the Oaklea family. Michael Bedworth has decided to retire as a trustee after almost twenty years’ dedicated service to the organisation. Michael will be much missed, particularly in County Durham where pre-Covid he was regularly seen chatting to employees and customers. >>





I am grateful to Andy Scott, my predecessor as Chairman, who has decided to step down as Vice-Chair. Fortunately, Andy will remain as Chair of the Finance Committee, and I am grateful to him for his wise council and support. Dr Philip Smith MBE was appointed as our new Vice Chair at the AGM in November and I welcome the opportunity of working with him.

I would also like to thank Dr Jane Sullivan, the Chair of Right2Work, part of the Oaklea Group, who has done a fantastic job in steering our CIC during the past year.

Finally, may I take this opportunity to thank our Board members, who give their time and expertise entirely for free, the Executive team, and all our employees for the dedicated care, support and education you provide for all of our customers. Truly, you are inspiring.

Chris Harris
Chairman



Thoughts from our CEO, Clive Wigley

It is with great pleasure that I am able to recommend to you this Oaklea Annual Report for 2021/22.

One of the major challenges for us whilst moving out of the pandemic, has been the recruitment and retention of new team members across many of our projects. This has not been a problem specific to the Oaklea Group, but it is one that has hit the sector nationally. We have worked very hard to overcome this challenge, by enhancing employment offers as best we could, and being a flexible and caring employer. Without the tireless dedication of all our employees, the organisation and our customers would have suffered, so a huge thank you to you all for your support during this time.

There have been many areas of success over the year including the launch of the first year of our Learning2Live project, a flagship project as an alternative to residential college. The concept has been developed alongside Oaklea's subsidiary, Right2Work, building on its expertise in education and employment. The work with children and young people in preparing for adulthood has been a significant theme during the year.

Oaklea Supported Living Services in the North West were rated as Good by the Care Quality Commission this year due to its focus on supporting individuals as citizens and ensuring health and social outcomes were a keen focus. >>





Our Working Behaviours



Oaklea in the North East has increased its footprint and delivered bespoke solutions where care has been more complex and, in some cases, involving judicial input.

One of the best parts of my job is to hear the success stories of our customers and learners, there have been many over the past year, and I thank you all for the work you are doing and congratulate you on the positive impact you are having. I have been particularly impressed by the green initiatives that are happening with each and every one of us ensuring we are being kinder to the planet.

In the year ahead please look out for opportunities to take part in our career development programme, and let's all get behind our new strategic plan which prepares us for the next five years.

I look forward to celebrating our achievements with you at our special event early in 2023.

Many thanks

Clive Wigley
CEO

Engaging with our People & Communities

The Green Influencers Project

Oaklea received funding to support a 'Green Mentor' who enable young people to lead the way as 'Green Influencers' on social action projects in their communities.

A 'Green Mentor' and wider green programme was appointed thanks to funding and support from Ernest Cook Trust (South Lakes) and Cumbria Community Foundation (Eden).

The young environmental activists will be at the forefront of youth social action projects that will benefit schools & communities.

Develop new locations that offer different vocational settings for learning

Oaklea and Right2Work will ensure financial and quality viability when looking at alternative locations. Some of these include: Lowther Castle & Gardens near Penrith, Susan's Farm near Carlisle and Westmorland Group at Tebay. We will ensure partners have a similar value base to Oaklea and Right2Work.

“
My support team helped me
as I have limited understanding
of computers.”





Employing Quality People

Implement the Matrix Quality Assurance Standard within R2W

After gaining accreditation – we are now able to demonstrate that we offer high quality Information, Advice & Guidance services.

Expand the Apprentice Academy across the North of England

The Apprentice Academy has already built strong links with Kendal College - with our first cohort graduating this year and now working in Oaklea social care settings in South Lakes.

Introduce the function of a “Safeguarding Buddy”

Support is given to customers or employees by someone independent of the location; including training as appropriate.



“ Absolutely love living here - best move ever made!”



Ensuring Adequate Financial Resources

We will:

- Tender and subcontract for Short Breaks within South Lakes/Furness.
- Review all premises rented and owned by the Oaklea Group in order to consider their ongoing suitability for purposes and financial affordability.
- Submit tenders for Supported Living Frameworks for Northumberland County Council and Cumbria County Council.



“It's so good to see how J has benefitted from our activities –and it's wonderful to see her growth and development over the past 6 or 7 years.”



What's New

right2work

part of the Oaklea Group

Learning2Live takes off in 2021

Learning2Live

> a project that combines **learning** and **a place to live**

Learning2Live is a partnership between Oaklea Trust

and its Right2Work subsidiary as an alternative to residential college for young people with an Education, Health, Care Plan (EHCP). In November 2021 a group of 6 young people moved into their new home in the heart of Windermere. The young people are all signed up as learners for 'Open Awards' qualifications delivered by an in-house team.

New Supported Living initiatives in the North East

Coundon near Bishop Auckland – we opened a new home for a group of people with complex needs.

Blyth – This new initiative in Northumberland allowed us to increase supported living opportunities in the county on behalf of Northumberland Council.

Going live - New website

Oaklea's new website went live in early 2022 – a major upgrade on the previous site. The site now better reflects what Oaklea Group does across the North. The new site, among other things, allows you to: donate direct to Oaklea; apply for the latest job vacancies and also access live social media feeds and breaking Oaklea news.



Youth Futures

Through the Youth Futures (YF) brand (part of Right2Work), we now provide schools with pastoral support, extra-curricular activities and alternative provisions to promote young people's personal and social development and enable them to have a voice, influence and place in their communities and society as a whole. Helping them to build resilience and character and giving them the confidence and life skills they need to live, learn, work and achieve. YF successfully worked with young people across North Cumbria – notably alongside Susan's Farm and Lowther Estates.

The YF Advisers follow the Career Development Institute (CDI) - Career Development Framework focussing on six learning and development skill areas which are needed for a positive career.



Eden Workshop goes from strength to strength

Right2Work Eden Workshop retail space is now well established at the Appleby Hub. It has grown and

now supports many local artisans to provide a shop window for their craft items. The Workshop also provides stock for the shop - which accounts for around 70% of sales. These include donated furniture which is upcycled using a range of chalk paints kindly donated by international paint company Annie Sloan.

What's New

Reviewing mission & vision

We will review our mission, vision and strategic priorities as an integral part of our organisation's strategy, to ensure it reflects fully our purpose and core values, continuing to support us to set priorities, allocate our resources and work towards common goals.

“
Oaklea Trust have some really good staff and they are really funny and make everyone happy.”



Our commitment to the environment

In 2021 we began working towards Bronze Investors in the Environment (IiE).

In 2022 following our audit with IiE this was secured - which is thanks to the hard work of our teams, bringing together the evidence, demonstrating we are committed to reducing our organisation's impact on the environment.

We are inspired and ready to continue growing a greener organisation working towards Silver Accreditation, supporting our communities, teams and customers to live and work more sustainably and working towards our ultimate target of becoming net carbon zero by 2037.

In Durham, teams have already taken this on board by:

- Using LED light fittings and bulbs where possible in the home.
- Conserving energy by ensuring that lights and appliances are switched off when not in use.
- All staff ensure heating is adjusted within the home to a comfortable level and with energy consumption in mind.
- Minimising the use of paper; reuse and recycle paper where possible.
- Recycling of printer cartridges / batteries / plastic / tins etc where possible.



Looking to the Future

The 5 objectives

- ✓ Deliver outstanding care, learning and personal development
- ✓ Attract, develop and retain high quality team members
- ✓ Diversify our revenue sources
- ✓ Develop the Oaklea Group brand across the North of England
- ✓ Enhance our governance

Looking ahead

- Local government reorganisation in Cumbria (to 2 Unitary Authorities) within the next 12 months may offer additional geographical opportunity for the bulky waste collections at The Furniture Warehouse.
- Project SEARCH with the NHS. Right2Work will be a key partner in the delivery of Project Search* a model for providing Supported Internships, generally with large employers.
*Project SEARCH is an international transition to work programme committed to transforming the lives of young people with learning disabilities and autism.
- Agree a net Zero Carbon target.
- Continue to develop more Day Opportunities like Susan's Farm & Lowther Estates.
- Develop a Leadership and Excellence Programme for the continuing professional development of our social care teams.



Financial Summary

Extract from Oaklea Trust Financial Statement year ending 31st March 2022.

Income

Donations	2,167
Grants	390,708
Fundraising Events	0
Interest Received	343
Charitable Activities	8,220,060
Total Income	8,613,279

Expenditure

Staff and Related Expenditure	7,453,356
Property and Estate Costs	408,934
Professional and Legal Fees	56,750
Turnover	287,564
Financing Costs	24,399
IT Expenditure	93,348
Total Expenditure	8,324,351

Surplus	288,927
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For every £100 of income here's what we spent it on in 2021/22

Staff and Related Expenditure	£89.54
Property and Estate Costs	£4.91
Professional and Legal Fees	£0.68
Other Overheads	£3.45
Financing Costs	£0.29
IT Expenditure	£1.12
Total Expenditure	£100.00



The income achieved for the year was £8,613,279 an increase of 6% over 2020/21. The charity received Covid 19 grants and Furlough grants which contributed to this increase. National Minimum Wage cost increases, together with Covid 19 costs led to overheads of £8,324,351 an increase of 7.4% over 2020/21.

Once again all our teams have worked hard to manage costs in a challenging social and economic environment. The overall result therefore was a surplus of £288,927, versus a surplus of £374,563 in 2020/21. As a people focussed charity the Oaklea Trust recognises that employees are our most valuable asset. Thus for every £100 of income received, £89.54 is spent on employees and employee related costs.







Thanks to our Grant Funders







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