



A N N U A L R E P O R T 2 0 2 3

Together we support stronger communities

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right2work

I would like to begin by saying a huge “thank you” on behalf of the Oaklea Trust and the Right2Work (R2W) Boards to all employees and volunteers for the superb care, support and opportunities which you provide for our customers & learners, and for your dedication and commitment to the Oaklea Group.

Being an employee/volunteer of the Oaklea Group is about going that extra mile and you demonstrate that fine quality in spades. I saw for myself the high standard of care given to our customers when I visited County Durham and Barrow-in-Furness, and this dedication can be witnessed wherever you go throughout the organisation. Put simply, without employee and volunteer dedication, the Oaklea Group would not thrive.

In April, we launched our new 5 Year Strategic Plan “to support and care for people and communities so that they can learn, develop and thrive”. Fine words, but what does it mean? Do what we do well, do it in a great team, make sure we can afford it, tell everyone how great we are and ensure we are managed effectively. The Boards, all unpaid volunteers giving their time and expertise, set the general direction of the organisation and oversee the implementation of the Strategic Plan by Clive, our CEO, and his senior team who I want to thank for all their hard work and efforts.

“It’s about going the extra mile.”

As part of the Strategic Plan, we have reviewed how the Boards operate and the relationship between them and we are delighted to welcome Julia Wood and Leslie Spring as Directors of R2W. Dr Jane Sullivan is stepping back from her role as Chair of the R2W Board after the AGM in November. Jane has given a huge amount of her time and energy to the Board, and we wish her well for the future and for her exciting adventures travelling around Europe.

Sadly, we also said farewell to Gillian Curwen (PA to Executive & Boards over the past 18 years). Gillian has never failed to support us with her unfailing politeness, efficiency, and good humour, and I know I speak for all Trustees & Directors when I say Gillian will be sadly missed.

I also would like to thank Dr Philip Smith MBE (Vice Chair), Andy Scott (Chair of Finance) and all my fellow Trustees and Directors for the generous time and support they give so freely to Oaklea & Right2Work.

Chris Harris
Oaklea Chair



"I declare the Hub Cafe reopened."



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I am very happy to introduce this Oaklea & Right2Work Annual Report. I am sure you will find it interesting and enlightening. We continue to increase our scope of work with Children & Young People, through initiatives such as Multiply, Short Breaks, and Learning2Live. Some of the articles within this document demonstrate the impact these initiatives are having on our customers, learners and their families.

Our care & support activities assist people to have improved choices and living experiences. Our Social Enterprises and work-related programmes assist learners to gain new skills and move into paid employment. We are also very proud of the work we do in *Supporting Stronger Communities*; and in particular the work of Appleby Hub.

Our employees have had the benefit of improved training and support, including development of a Mental Health First Aid Team. We are reviewing policies and practices to ensure we remain a very family friendly organisation and adopt a flexible working approach. Our Trustees and Directors encourage our work and take an active approach in visiting and talking to learners & customers, and our employees to ensure the quality of our provision remains high.



Our future focus as always is to seek continuous improvement in all that we do and seek new opportunities to improve the life experiences of those we support. We continue to drive forward our supported housing project within Eden, we also would like to expand the Learning2Live opportunities as this has been a great success and we would like to offer this opportunity to more young people making the transition into adulthood.

I do hope you enjoy reading the Annual Report.

Clive Wigley
Oaklea CEO



right2work

What another incredible year for the Right2Work team and the people they support. The achievements made this year and the impact these have had on so many people's lives are a testament to the hard work and dedication of everyone involved with R2W, whether as employees, volunteers, learners or their families.

When I think of the work that R2W does I am always brought back to its vision. 'We deliver the finest opportunities in the kindest possible way' and I think this year R2W have shown they have fully embraced this vision. With their continual drive to create new and exciting facilities and programmes for all of their communities they have provided even more opportunities for people to improve their life chances.

Whenever we visit R2W, as Directors, we are always welcomed by the people who work and learn there. We get a real sense of family and belonging and this is something that cannot be quantified in written reports and financial figures. This is only made possible by the special people who make R2W a success - not only those who work directly with our communities, but also those that work tirelessly behind the scenes to ensure



R2W can continue to work legally, safely and is financially secure for future years.

On behalf of all the Directors of R2W, we thank you all and wish you all the best for the year to come.

Dr Jane Sullivan
R2W Chair



“There was a great range of activities for the children to take part in. A schedule for the daily and themed sessions made each day different and exciting.”

DfE HAF Inspection Team



“I think it’s really fun – lots of activities and get to eat a good lunch, meet lots of new people and make new friends. It’s really good [would you recommend to others?] Absolutely!”

Jacob, age 11



We are pleased to support Cumbria’s Holiday Activities & Food (HAF) Programme; a national initiative from the Department of Education, providing a wide range of exciting and enriching activities running during the school holidays. All the activities are free for children (Reception to Year 11) who receive benefits-related free school meals and other eligible children in particular circumstances. Find out more on our website at <https://www.oakleatrust.co.uk/holiday-activities-fund/>

"I'm leaving with my head held high."

TFW Learner



Multiply



Our achievements include continued success with contracts:

Multiply is a national programme which R2W deliver across Westmorland & Furness. It's aim is to build confidence with maths & basic numeracy.



"This was a very good session, evidencing the practical application of numeracy. It was well managed and well organised. Following discussion with learners it was clear that learning and progression was evident, and that learners were benefiting from the learning acquired."

W&F Commissioners on a visit to R2W Multiply sessions





Oaklea's Targeted Short Breaks offer has gone from strength to strength.

Designed specifically to give children and young people with disabilities a variety of supported activities to take part in throughout the year; we use local venues to run a variety of after school term time clubs and activities.

During school holidays we also offer a range of full and half day sessions such as bowling and fun days. Parents and carers can have a real break whilst children can make friends, learn new skills and have fun!



We have had additional success for 2022/2023 by adding to this short breaks offer with our Youth Futures groups for young people in academic years 10 to 13; those young people making the transition to adulthood.

Youth Futures aims to build resilience and character and give young people the confidence and life skills they need to live, learn, work and achieve. We provide needs-led emotional, social and practical support for young people and their families; connecting what you're learning with real-life experiences in work, volunteering and creativity and so much more.





Training

Autism – More than 1 in 100 people in the UK are on the autism spectrum and autism is a lifelong disability that affects how people perceive the world and interact with others. Oaklea have introduced training from the National Autistic Society: Autism and SPELL, a two-day interactive course that aims to provide an understanding of the different experiences of autistic people, challenging stereotypes and recognising support structures and interventions.

“This training for our teams allows us to explore how to adapt strategies to ensure the best possible support and understanding is given to our customers on the autism spectrum.”

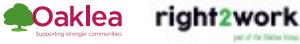
Pete Embling, Oaklea/R2W Training Lead



Mental Health First Aid – Oaklea Group’s MHFA team are trained by Mental Health England and earlier this year we welcomed additional colleagues

to the team. We want our employees to feel happy and empowered in all aspects of their life and we want to provide our teams with as much support as possible, both at work and outside of work.

Alongside our MHFA’s we provide support through Sovereign Health Care. With a helpline with qualified nurses who can offer a sympathetic ear and practical information; they can help in an array of areas from health and lifestyle, legal information, home life and work life.



Our Working Behaviours

Sustainability

This year we secured Silver in our Investors in The Environment (iE) accreditation and we are very proud of this achievement. We set targets to reduce our environmental impact and took action to improve our performance; whilst striving to enhance the communities in which we operate.



“Oaklea has continued to show good leadership and demonstrated their commitment to improving the organisation’s environmental performance. A good understanding of resource needs and use has been shown across the different locations.”

Dr Jan Maskell, iE North West





In line with the government's commitment to support the digital transformation of adult social care, much of Oaklea Group's paperwork has moved online.

iPlanit is a care planning software solution designed to help care providers evolve beyond "time and task" approaches to an outcomes-focused, person-centred approach. We started using it as a pilot with our North East teams and now it is being rolled out across all areas.



//

We are thrilled that Oaklea teams within Kendal and Furness are now able to use iPlanit to record customer support notes, helping us reduce our paper systems. All contributing to our strategy for environmental sustainability."

Oaklea Director, Sue Green



Ryan's Dexcom Journey

Oaklea employees strive to make life better for those we support...here's how it worked out in Ulverston for Ryan.

Ryan was using a blood glucose monitoring device on his arm. In order to support him with managing his diabetes the Team at Rakehead would need to interrupt Ryan to check the levels and support Ryan to take the appropriate action. This meant interrupting his daily activities but also disturbing his sleep; as a reading had to be taken during the night.

Understanding the impact this had on Ryan, the Team worked with Ryan and his family to seek advice from his diabetic nurse to see if the situation could be improved upon.

Diabetic Nurse Kathleen brought a Dexcom One for Ryan to look at and learn about the differences between this and his existing equipment. Ryan and the Team learned that the new device worked via Bluetooth and would not need to be physically scanned - Ryan agreed to try this out!

With support from his parents, Ryan purchased a mobile phone dedicated to use with the Dexcom One device. Kathleen supported the Team to set up the phone and download the app, registering an account and ensuring the device communicated correctly with the phone.

At first Ryan was concerned about the change; the Dexcom One is slightly bigger than the Sensor Libre he was used to and he also felt a little more uncomfortable when it was being changed

because it is much stickier than his old sensors. However the positives far outweighed the negatives and Ryan has expressed his preference for not being disturbed during the night to check his glucose levels and that it was something he could get used to.

Ryan now enjoys the benefits saying "it's much better" and he has much greater freedom, being given an alert at appropriate times rather than stopping in the middle of every activity.

"Ryan has settled well at Rakehead. He has a great relationship with the staff and the improvements with his diabetic medication is fantastic. He no longer has to be woken up at night as his readings go straight to the mobile phone which alerts the staff if there is a problem."

Kerry Hirst, Mum



Download the curriculum here
<https://www.oakleatrust.co.uk/learning2live/>



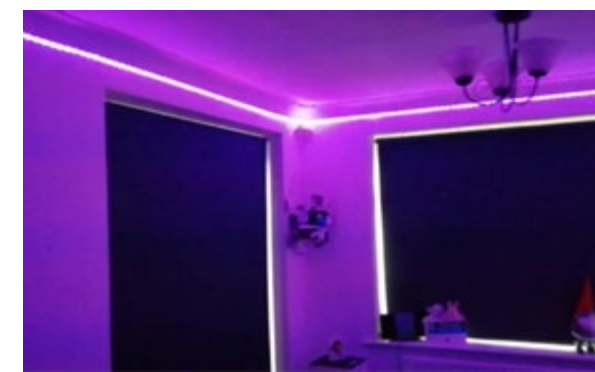
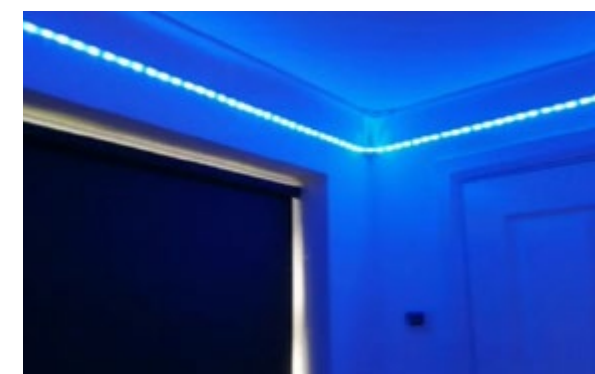
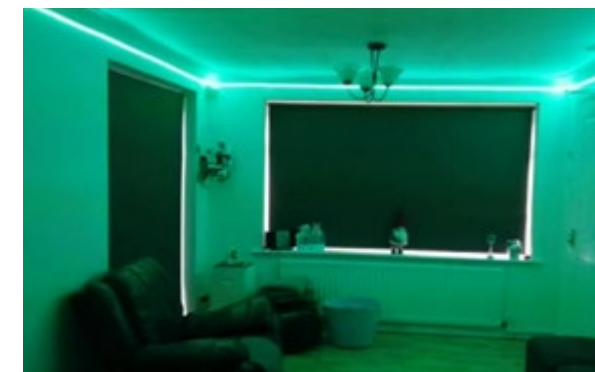
// Over the course of the first year we have seen really positive progress and development of the learners. They have met key milestones as part of their learning journey. This has meant great use of their own dedicated learning space plus getting out on placements across South Lakes."

Matthew Douglas,
 CYP Team Manager



Learning2Live is the programme bringing together the skills of Oaklea and Right2Work to provide high quality and person-centred education and care; using specialist approaches and individual learning programmes, from our unique on-site learning and supported living facilities.

Learning2Live has moved into an already successful Year 2 and our learners have already gained so much; managing their home and independence and taking on new challenges in the world of work.



Staff went the extra mile to make a customer's most personal space as fantastic as possible.

Customer B's bedroom required updating as his needs have changed a little over the year. We supported B to choose new furniture including a bed, a new wardrobe, lighting and decoration. B had several mismatched pieces of furniture previously and although he has a large room, they became obstacles for his mobility. We found a wonderful wardrobe that had great storage space for all of his clothes. The unit also has a row of LED's along the top and is a better 'soft' light source and much less distressing during the night when he requires support.

We also supported him to choose an Ottoman that sits under the clock. Our team members can now sit opposite him when he has 1-2-1 support in his room; we often read stories to him and he relaxes to the sound of our voices.

Weekly Reiki sessions also have a positive support for B's mental health and the Reiki practitioner now uses the LED's during the session and she has told us that this works well; providing the right ambience for the session.

Overall, the refurbishment of B's living and sleeping space has been a great success. His family love it and everyone from the district nurse to his psychiatrist have commented on how relaxing the space is. Most importantly B loves it too!



Seeing success with Sue (centre)

...OUR TRUSTEES

Sue O'Halloran has been an Oaklea Group Trustee for over 10 years. Her background is in social work and teaching health and social care.

Over a busy career she was a social worker in Knowsley near Liverpool, a Practice Manager in Peterborough, and a Principal Lecturer and Head of Department in the University of Cumbria.

"Being a trustee is very rewarding. It allows me to keep in touch with the field in which I worked and focus on emerging best practises, whilst also supporting a worthwhile charity.

The Executive team provide the Board with a lot of helpful information to support the Board's governance and decision making processes. It's important for the Board Members to understand the details but equally important that we remain focussed on the strategic priorities of the Charity and not get too involved with operational decisions.

It's days like today when I am able to visit our customers and support the quality audit process that make the role very valuable. I can see the Charity's work in action, meet lovely welcoming people and ensure we are working towards our mission of supporting people so that they can learn, develop and thrive."



Trustee Stephen Welch with R2W Work & Learn



R2W Board member Martin Bell



R2W Board member Julia Wood visiting TFW



...OUR CUSTOMERS

During the Autumn, lovely Northumberland based Oaklea customers Geoffrey & Mary were in the process of moving to a new home; a stressful time for anyone, but thanks to their support team and a 'can do' approach it all went smoothly.

"You can see them both working hard in the garden at their new home and look at their fab Wisteria. Mary is doing her volunteer work at a local café. She loves nothing better than making the coffees and being helpful. I'm thrilled to see how both customers and our team have flourished in this short time."

Janet Wrightson, Team Manager

"Janet leads a great team who support both Mary and Geoffrey to achieve goals and outcomes that promote citizenship, including that of their presence and involvement within their local and wider communities. The house itself is truly homely, comfortable and very well presented in fact most people who visit including me, say that they would live there. I always look forward to my visits and seeing and hearing what exciting plans have happened or lay ahead."

Neil Sadler, Oaklea Registered Manager, Northumberland

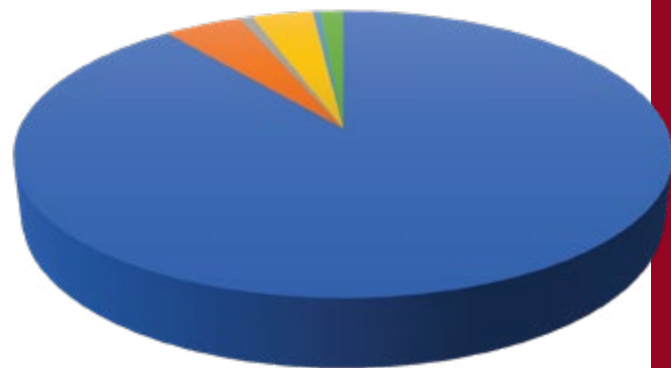


FINANCIAL SUMMARY

Oaklea Trust achieved income for the year of £8,642,076 an increase of 0.3% over 2021/22. The charity had total expenditure of £8,316,863 a decrease of 0.02% over 2021/22. Both income and expenditure were impacted by project closures, increases in national minimum wage rates and CPI.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 £325,213, versus a surplus of £288,927 in 2021/22. Oaklea Trustees have ringfenced £254,365 out of this surplus for capital projects within the next financial year.

These projects will protect and enhance the charity’s buildings, furnishings and IT infrastructure.

As a people focused charity the Oaklea Trust recognises that employees are our most valuable asset. Thus for every £100 of income received, £89.34 is spent on employees and employee related costs.



Extract from Oaklea Trust Financial Statement year ending 31st March 2023

	2023 £
INCOME	
Donations	58,925
Grants	60,066
Fundraising Events	0
Interest Received	4,806
Charitable Activities	8,518,278
Total Income	8,642,076
EXPENDITURE	
Staff and related expenditure	7,430,295
Property and estate costs	377,750
Professional and Legal Fees	63,378
Other Overheads	296,547
Financing Costs	34,680
IT expenditure	114,213
Total Expenditure	8,316,863
Surplus	325,213

For every £100 of income here's what we spent it on in 2022/23

■ Staff and related expenditure	£89.34
■ Property and estate costs	£4.54
■ Other Overheads	£3.57
■ IT expenditure	£1.37
■ Professional and Legal Fees	£0.76
■ Financing Costs	£0.42
Total Expenditure	£100.00

FINANCIAL SUMMARIES

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FINANCIAL SUMMARY

“Through the hard work of the Team, Right2Work C.I.C. has not only had a fantastic environmental, educational and societal impact, it has also delivered operational profits after tax of £73,641 for the year ended 31.3.23. This has enabled a gift aid donation to Oaklea Trust of £56,641 to be made, together with a transfer to reserves of £17,000 further strengthening the Right2Work balance sheet.”

Charles Holdsworth,
Finance Manager, Oaklea Group



Andy Scott, Chair of Finance Committee,
visiting our Finance Team

Trading and profit and loss account for the year ended 31 March 2023

	2023 £	2022 £
TURNOVER		
Sales	1,096,911	941,111
Grants and donations	95,288	58,193
JRS grant	-	14,833
	1,192,199	1,014,137
COST OF SALES		
Purchases	51,677	44,158
Waste disposal	6,772	6,696
Wages	662,980	597,788
Social security	39,235	32,029
	760,664	680,671
GROSS PROFIT	431,535	333,466
Establishment costs		
Rates and water	2,683	1,895
Insurance	26,750	20,490
Light and heat	11,589	10,786
Rent	47,109	44,807
	88,131	77,978
	343,404	255,488
Administrative expenses		
Wages	57,343	49,444
Social security	5,885	5,143
Telephone	9,017	9,017
Post and stationery	5,092	4,184
Advertising and website costs	1,363	1,172
Motor and travelling expenses	39,877	24,129
Uniforms and protective clothing	-	519
Repairs and renewals	62,380	20,858
Sundry expenses	37,828	62,273
Management charge	6,492	5,410
Legal and professional fees	14,526	(2,562)
Auditors' remuneration	-	4,250
	239,803	183,837
	103,601	71,651
Finance costs		
Depreciation	-	4,351
Tax	25,572	20,093
	4,388	12,542
NET PROFIT	73,641	34,665

2023 - 2028

5 things that we aim to do:



1. Do what we do well

Deliver outstanding care, learning and personal development.



3. Make sure we can afford it, now and in the future

Diversify our revenue sources, build & develop our strategic partnerships.



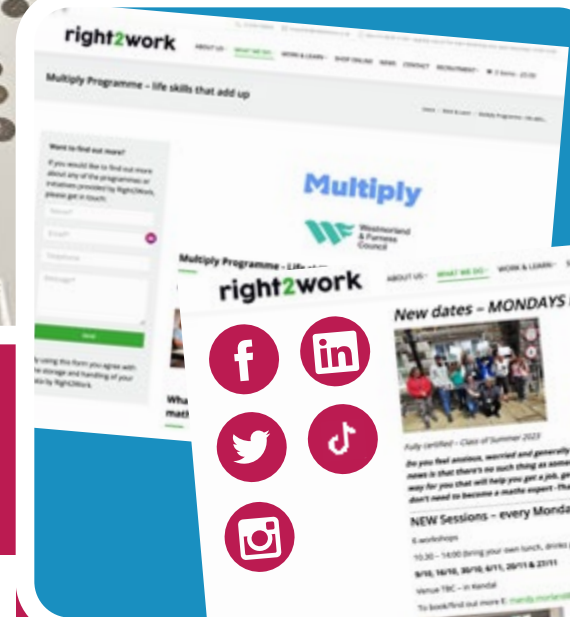
2. Do it with a great team

Attract, develop and retain high quality team members.



“Thanks for this – it is fantastic to see the programme come alive.”

Chris Dempsey, Manager, Cumbria Adult Learning – commenting on our Multiply web pages



4. Let everyone know how great we are

Develop the Oaklea Group brand across the North of England.



5. Check we are still fit for purpose

Enhance our governance and share best practise.

CONNECT WITH US

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