



Supporting stronger communities

right2work



Supporting and caring
for people and communities
so they can learn,
develop and thrive

Annual Report 2024

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CHAIR

Chris Harris

It is with immense pride and gratitude that we present the Annual Report for 2023-2024.

Over the past year, Oaklea has navigated both challenges and successes and none of it would have been possible without the dedication, compassion and tireless efforts of our employees who have continually gone “above and beyond;” ensuring that customers, learners and communities receive the finest opportunities so they can learn, develop and thrive. Our employees’ commitment to our mission drives us forward and Trustees and Directors join me in thanking them for all their efforts.

This year marked a significant milestone as we launched the implementation of our five-year Strategic Plan in January. This ambitious roadmap will guide our growth, innovation and impact in the years to come, ensuring that we continue to meet the evolving needs of our customers and their families, learners and the communities we support.

The new Leadership and Management Programme, which provides a Level 5 qualification in

conjunction with Kendal College, further empowering our teams, was launched at the start of the year. Refurbishment of Right2Work’s Appleby Hub began in the new year, and we anticipated the start of work at Edenside later in 2024.

During the year we have seen some volunteer Trustees and Board Members step down and we thank them for their service. We have continued to recruit further valuable skills and expertise to the Boards of Right2Work and Oaklea Trust so we may continue to develop and strengthen our Group’s governance in this way moving forward.

Congratulations must go to our Chief Executive, Senior Leadership Team and everyone involved in delivering a notably strong financial performance in the year to 31st March 2024. This was helped significantly by Local Authorities recognising the need to invest more in the sector to enable

the recruitment and retention of social care employees. The Charity and its subsidiary, Right2Work, have been able to remain financially robust in trying times, and increase reserves to continue to meet objectives for the coming period. This Annual Report not only highlights this significant business success, without which we could not possibly provide the level of care that we do, but more importantly, the deep impact the hard work of our employees has on the lives of those in our care.

This Annual Report is a celebration of compassion, skill and dedication which makes the lives of our customers and learners better and the communities we serve more caring. This is what makes a hard day’s work so rewarding.

Thank you everyone.

**Chris Harris, Chairman,
The Oaklea Group**



CEO

Clive Wigley

It is a delight to be able to introduce this report especially as this will be my last opportunity before retiring from the Oaklea Group after the past twenty-seven years.

This report is focused on our journey and aspirations of the Group during a given timeline, but the achievements of the group over many years has been quite remarkable with the development of many initiatives that support our customers and learners to achieve their dreams, to thrive, learn and live fulfilled lives within their communities.

This has been achieved through the support of both Boards, and the dedication and hard work of each and every employee at Oaklea & Right2Work. Something we can all be very proud of.

This Annual report is focused around our five Strategic Objective areas:

1. Deliver outstanding care, learning and personal development
2. Attract, develop and retain high quality team members
3. Diversify our revenue sources
4. Develop the Oaklea Group brand across the North of England
5. Enhance our Governance

And you will read throughout this document examples of how we are moving forward to achieve these objectives and our plans for the future.

I am sure the Oaklea Group will go from strength to strength.

Clive Wigley, CEO

Strategic Objectives

1.

Deliver outstanding care, learning and personal development



2.

Attract, develop and retain high quality team members



3.

Diversify our revenue sources
JANOME



4.

Develop the Oaklea Group brand across the North of England



5.

Enhance our governance



1.

Deliver outstanding care, learning and personal development

> Digitising care progress

> Moving in: Steve returns to Oaklea

In last year's Annual Report we highlighted the move to digital in Social Care & for our Learners.

This is now well underway through iPlanit and Upshot.



Bob Parkinson, Team Manager in Consett, County Durham

"iPlanit is a comprehensive care planning software that offers care workers immediate access to their records, enabling efficient documentation and time savings. The software allows for speech-to-text functionality, allowing quick logging of detailed notes in an individual's record, even while on the go in community settings.

- It streamlines tasks, allowing care workers to focus on meaningful support towards outcomes and quality-of-life.
- iPlanit reduces paperwork, allowing care workers to focus on delivering better outcomes and improving the lives of those under their care.
- iPlanit empowers care workers by simplifying documentation processes, providing quick access to relevant information, and optimising their workflow for more effective and person-centred care.
- Care workers can access their records instantly with iPlanit, a comprehensive care planning software that facilitates timely and effective documentation.

Bob adds: "iPlanit simplifies documentation procedures, gives caregivers instant access to pertinent data, and streamlines their workflow to deliver more efficient and person-centred care."

The Upshot is...

We are also rolling out digital options at Right2Work.

Claire Westmorland from 'Work & Learn' on upshot

"We have implemented an ICT programme called Upshot. The system holds all our learner details, it tracks learner progress, it makes it easier to share information and updates on learners between the team. It also ensures everything is stored confidentially as there is no paperwork lying around. A win for the environment too!"



"We would like to say a huge thank you to everyone at Manor Barn for welcoming Steve back into the fold last November.

Since he has returned we have nothing but praise and admiration for all the team and housemates.

He has quickly returned to his former happy smiling self and is engaging much more with everyone.

Previously he had lost this spark which was sad to see.

Steve always likes to look good and his presentation is always managed well now - looking well groomed and as handsome as ever!

Steve's housemates always make family welcome on any visits which is fantastic and we are always offered a brew -very important!

Steve has enjoyed some fantastic trips out and we feel he actually has friends rather than just housemates now - which is so good to know.

Thank you to you all!"
Michelle & Joe Corrance, parents



> Supported Internships successes check in

A long running Right2Work success has been Supported Internships. They are a structured work based programme for young people.

“Sapphire – she is an amazing young woman and I am so proud of her getting her job.”
Jacq, Work Buddy at Booths, Ulverston

“She has flourished at Booths and developed not only her employability skills but life skills too. Along the way we have worked on money management and recognition enabling Sapphire to work more effectively on the tills. We have also enrolled Sapphire on an adult learning class run by Cumbria Adult Learning in Barrow library and she is on track to get her level 2 maths qualification this month.”
Michelle Bamber, SI Team Furness



“One of our learners on placement at Station Hotel in Carlisle is now going to be working at the hotel! Chris applied for a position within the hotel and attended an interview and I am pleased to say he was successful. This was his first ever interview and certainly one to remember. Chris has worked extremely hard since starting at the Hotel back in October and his hard work has paid off.”
Rebecca Hewson with Right2Work SI Carlisle



Scan the QR code to find out about our SI offer across Cumbria and (now) North Yorkshire
www.right2work.org.uk/supported-internships/



Scan the QR code to hear Chris on video celebrating SI Day
www.right2work.org.uk/supported-internships/together-were-celebrating-supported-internships/



Scan the QR code to hear Layla's story <https://youtu.be/nhgzc6PTX7Q>



Future Choices
Community interaction with the Right2Work Community Garden – initially established by the Children & Young People's Team post Covid.



Sensory Garden Spennymoor
Time spent in a sensory space helps people improve their visual, auditory and tactile processing.



Layla Targets Healthy Eating
Let us introduce Layla – here she tells us all about what Peter has been up to in the garden! (and like Peter -she's partial to a healthy carrot or two..)



> Customer goals



Ella Onto A Winner
Ella from Barrow is a huge rugby league fan - so much so she's part of a team connected to Barrow Raiders. She's now into her second season with the tag rugby team – called Able Raiders. Ella receives lots of support from our staff who give their time to take her to weekly training sessions and also support her to tournaments.
“We are all very proud of what she is achieving, the enjoyment she gets from it and helping her to get fit as well, it is all really positive for her.”
Sue Mallinson, Team Manager, Barrow



Wheels In Motion
Customer goals – Trevor from Rothbury is able to make more of where he lives thanks to his support team.
Oaklea's Sandra Wells & Tom Thompson from Northumberland
“After several delays and lots of perseverance from Tom, our Trevor has received his new van and is over the moon.”

2. Attract, develop and retain high quality team members

- > Apprentice Academy
- > IOSH Further training

> Nurturing and empowering those we support

Expand the Oaklea Apprentice Academy

Oaklea are building on their Apprentice Academy which began with Kendal College – we’re now developing this in County Durham.

“This is our new apprentice Paige Monaghan. Paige is the first in County Durham to have an apprenticeship with Oaklea. Our customer, Susan has achieved one of her goals of wanting a sensory box. As you can see Paige is helping her achieve her goal by using the visual aids, this helps to calm Susan and relax her.”

Kay Berriman, Oaklea, Spennymoor



IOSH Training

The Group has continued to develop further training for our Managers and Senior Leadership Team including employment matters, customer service and IOSH Leading Safely.

Dan and Calum: The Volunteers

Every year we mark Volunteers Week – those who volunteer with us – and also those we support making an impact in their communities. Two great examples are from the North East. Two young men we support in Seaham, County Durham.



Dan gets recognition

Dan has been volunteering with Durham County Council, once a week at a local leisure centre in Seaham doing meet & greets and other people focussed tasks. He was recognised by Durham County Council at an event at Raby Castle near Darlington for a day out to celebrate Volunteers Week. On top of this – Dan also does other voluntary work at a garden centre run by the Shaw Trust in Seaham. He’s a very busy man!



Calum – giving back in high places

Calum is a volunteer in one of the North’s best known locations... **Seaham Team Manager, Patricia Lee:** “He’s volunteering at Durham Cathedral as a Visitor Experience Volunteer. In this role he’s ensuring that Durham Cathedral provides a well-informed and hospitable welcome to its many and varied visitors. Calum will be an ambassador for the Cathedral alongside staff and other volunteers, helping to build and maintain the reputation of Durham Cathedral as one of the most welcoming and best-loved heritage sites in the region and beyond.”



3.

Diversify our revenue sources

> Finance Summary

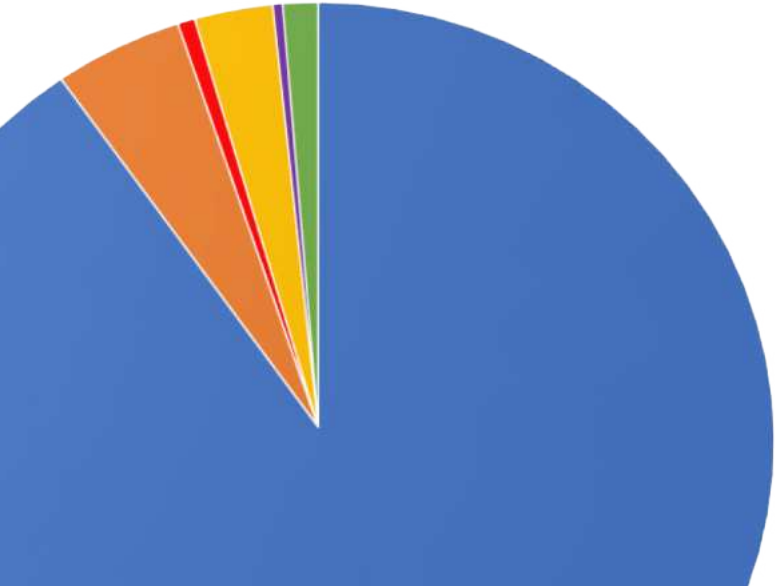


Oaklea Trust achieved income for the year of £9,097,269 an increase of 5.3% over 2022/23.

The charity had total expenditure of £8,845,229 an increase of 6.4% over 2022/23. 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 £252,040, versus a surplus of £325,213 in 2022/23.

As a people focussed charity the Oaklea Trust recognises that employees are our most valuable asset. Thus for every £100 of income received, £90.16 is spent on employees and employee related costs.



Extract from Oaklea Trust Financial Statement year ending 31st March 2024

	2024 £
INCOME	
Donations	95,961
Grants	0
Fundraising Events	0
Interest Received	4,354
Charitable Activities	8,975,954
Total Income	<u>9,097,269</u>
EXPENDITURE	
Staff and related expenditure	7,974,549
Property and estate costs	415,068
Professional and Legal Fees	55,686
Other Overheads	253,949
Financing Costs	31,914
IT expenditure	114,063
Total Expenditure	<u>8,845,229</u>
Surplus	<u>252,040</u>

For every £100 of income here’s what we spent it on in 2023/24

■ Staff and related expenditure	£90.16
■ Property and estate costs	£4.69
■ IT expenditure	£2.87
■ Financing Costs	£1.29
■ Other Overheads	£0.63
■ Professional and Legal Fees	£0.36

right2work

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 £112,486 for the year ended 31.3.24.

This has enabled a gift aid donation to Oaklea Trust of £95,486 to be made, together with a transfer to reserves of £17,000 further strengthening the Right2Work balance sheet.



The Furniture Warehouse launched its E-commerce offer in 2023 when the online shop went live. They also host a monthly open day when the warehouse is open to the public to browse and buy in person.

Extract from Right2Work Financial Statement year ending 31st March 2024

	2024 £	2023 £
TURNOVER		
Sales of goods and services	1,272,238	1,192,199
COST OF SALES		
Purchases and other direct costs	839,456	760,664
Administrative expenses		
Staff and related expenditure	52,156	63,228
Property cost	65,098	64,013
Insurance	18,947	26,750
Professional and legal fees	1,465	14,526
Finance costs	6,373	6,430
Motor office & other expenses	136,487	162,694
P/L on sales of fixed assets	749	-9,707
Depreciation	34,171	25,572
	<u>315,446</u>	<u>353,506</u>
PROFIT BEFORE TAX		
Tax	117,336	78,029
	-4850	-4388
Surplus	<u>112,486</u>	<u>73,641</u>



the furniture
WAREHOUSE
pre-loved

3.

Diversify our revenue sources

- > Learning2Live – Moving On: First cohort leave in 2023

Learning2Live in Windermere is an example of how we are developing innovative ways to use available funding to deliver the most impact.

“We are very proud of how Beth has learnt to live independently of her family. She has adapted well to sharing a house with friends and they all seem to have great fun together with lots of giggles. Beth always seems very happy to go back to Ellerdene.”
Mum & Dad

“Mollie independently walks across to the centre and back again after work. She is known within the Marchesi Centre community and is friendly to everyone she sees. When asked a question Mollie will answer well and often with humour!”
Bridget Wood, Marchesi Centre, Windermere



At Learning2Live our first cohort of learners have now completed their 3 year Learning programme and have either moved or are about to move into their new, independent flats.

“Year 3 at Learning2Live focuses on supporting our learners to hone the skills and knowledge that they will need when they leave us and begin living with a greater level of independence. They learn more about their rights and responsibilities as tenants, about taking greater responsibility over paying bills and budgeting as well as continuing to look after themselves and their home.

Over the last 12 months we have worked closely with Adult Services and Supported Living providers to find appropriate housing options for those moving on from Windermere. We have

learned a lot during this process and it has been really beneficial for our learners, and us, to view a variety of different housing options and to go through the application and referral process to ensure each individual begins the next stage of their lives in a home that provides them with the right balance of independence and support. Two of our learners have moved back to the Furness Area to be closer to family and two have places in Kendal. All four have tenancies on flats of their own and are now embarking on their adult lives using the independent living skills that they have worked so hard to develop. We are very much looking forward to hearing how they are getting on in the coming months.”

Sarah Pantechis, L2L Team Manager

4.

Develop the Oaklea brand across the north of England

- > Making a big impression for Oaklea brand awareness at the highest level

Oaklea are a provider of the national Holiday Activities & Food programme – HAF in South Lakeland & Eden.

“The HAF programme provides healthy meals, physical and enriching activities, and free childcare places to children from low-income families, benefiting their health, wellbeing and learning.”
Department for Education



Scan the QR code to see Jacob's video
www.youtube.com/watch?v=7MP0U94gLz0

For #HAF2023 across England we were included in a national DfE (Department for Education) celebration in October 2023. This was attended by Junior Ministers and various representatives from the DfE. Guess who became the main attraction, our very own Jacob, thanks to the video which can be accessed using the QR code. He not only featured, he was the grand finale, where the **Deputy Director at DfE, Emily Whitehead** said “How do you follow that – it was amazing.”



Developing a Greener Brand
Part of working towards a target of Net Zero for 2037 through policy and procedure changes, training and support from leadership to all operations across the group.

> Access All Areas

5.

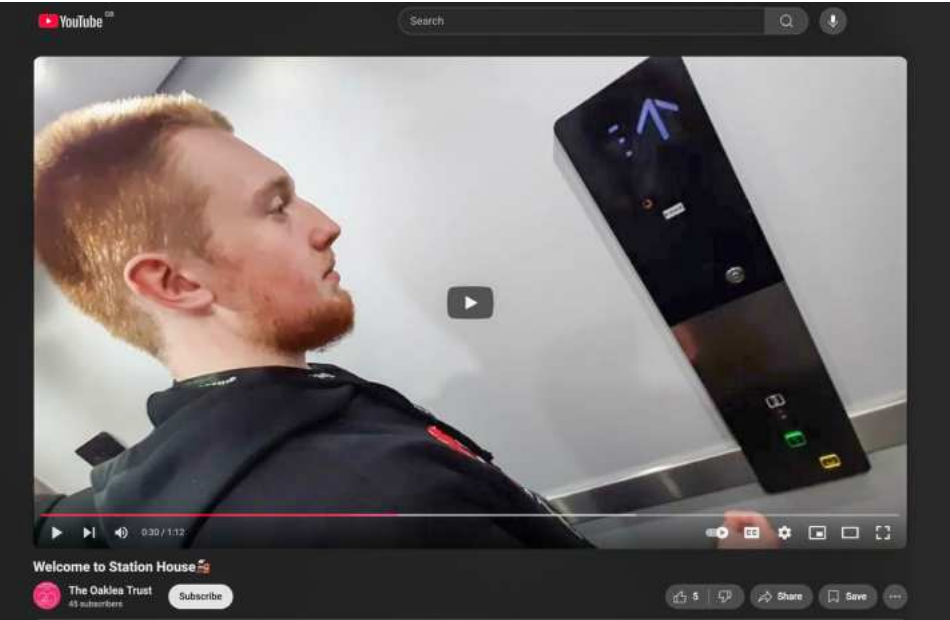
Enhance our governance

> New Faces – New Trustees From North East

Matt Tuson, a Learner on our Right2Work Future Choices programme, based at Station House, was tasked with creating a video that explains how easy it is to access Oaklea Group Headquarters. He was assisted by fellow Learners, Sally, Jess, Miya and Future Choices Laura Banks.



Scan the QR code to see Matt's video
<https://www.oakleatrust.co.uk/locations/south-lakes/>



Brand Page Turners
The Appleby Hub made an impression in the pages of the glossy Cumbria Life. It was a great way to highlight what this community enterprise is doing for the community of the Eden Valley - from wholesome food to craft workshops and well being classes.

Growing Board Capacity

"I believe that ALL work should be engaging, stimulating and meaningful"
Craig Smith

One of our strategic objectives is to develop the role of board members to capitalise on their connections and networks to promote the organisation.

"I've really enjoyed my first few months at Oaklea. Everyone I've met has been incredibly helpful and supportive. I've been really impressed with the quality and commitment of the employees and other trustees I've met. I'm looking forward to visiting and meeting customers and community teams soon."

Who is Craig?
"I bring over 25 years of experience of working as a line manager, Learning and Development professional and business owner. I have worked as an employee in sectors such as utilities, logistics, food, fast-moving consumer goods (FMCG) and construction. Subsequently, as a business owner, I have worked with an even more diverse range of organisations."



Trustees at Large



Robin Talbot first became a Trustee in 2022 after a career working in Education and the Health Service across Lancashire and Cumbria. Given that experience he is very keen to ensure our customers have first-class support and can lead full independent lives. As a Board Trustee he would like to add value to the Board and is keen that the Board has a major focus on the quality of the Charity's services.

Another Trustee, Colin Mitchell, has recently shared his time and extensive expertise with our Leadership & Excellence Programme cohort of learners in workshops at the Appleby Hub. The employees feedback was fantastic.

2024-25 What's next?

1: Do what we do well

- Support customer goals.
- Continue to work to Net Zero target.
- Engage new partnerships.
-

2: Do it with a great team

- Continue to build on the Leadership & Excellence Programme.
- Prepare for a successful Matrix Accreditation.
- Implement Oliver McGowan style training as delivery models and availability emerges.

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

- Develop a 5 year plan for Right2Work including growth of Future Choices, bulky waste and Supported Internships.
- Better understand the marketplace to create new business opportunities and widen participation.
- Build and develop strategic partnerships to respond to procurement, commissioning and political changes.



4: Let everyone know how great we are

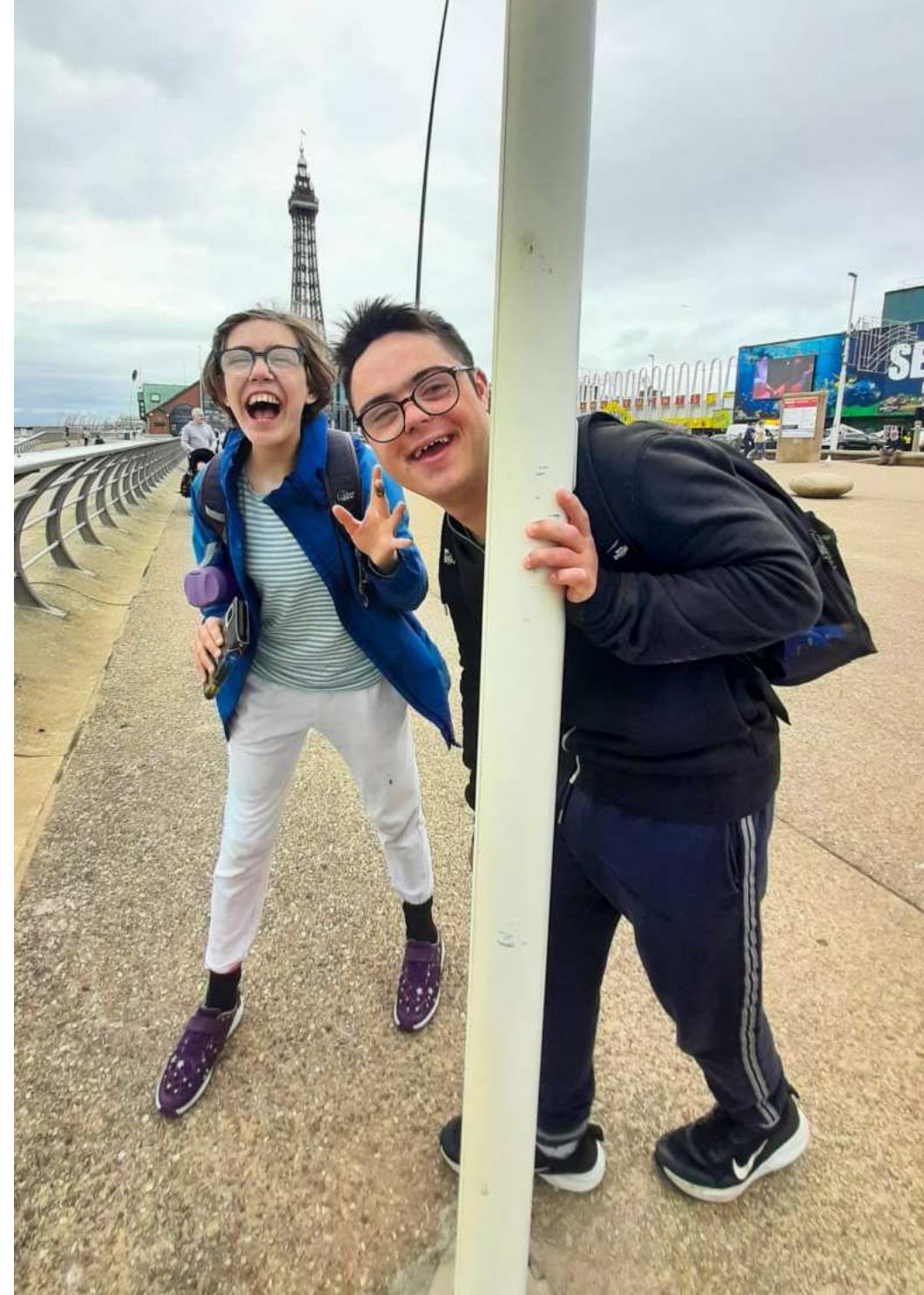
- Develop new ways of advertising and communication channels.
- Use feedback from CQC (Care Quality Commission) "I Statements" surveys to support continuous improvement.



5: Good governance – keeping us on track

- Review our articles of association keeping them fit for purpose.
- Review safeguarding role and training for the Boards.
- Grow board capacity.







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