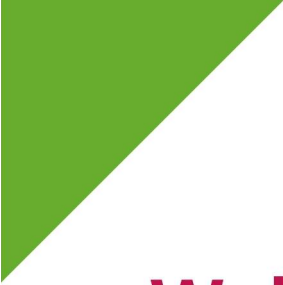


OAKLEA TRUST CHAIR CANDIDATE PACK 2026





Welcome from our Interim Chair and Group CEO

On behalf of the Board, we are delighted that you are considering applying to become the next Chair of Trustees of Oaklea Trust and Chair of the Oaklea Group.

This is a unique opportunity to help lead a values-driven organisation that supports people and communities across the North of England to learn, develop and thrive.

It is a particularly exciting time to join us. As we begin thinking about our next strategic plan for 2028-2033 and beyond, we are looking forward to welcoming a new Chair who will help shape our future direction, ambitions and impact. Over the past 18 months, we have invested significantly in our people, strengthened our governance through the recruitment of new Trustees and Non-Executive Directors, and enhanced our organisational capability. We are now beginning to see the positive impact of these investments and are excited about what comes next.

The Oaklea Group comprises Oaklea Trust, a registered charity, and its wholly owned social enterprise subsidiary, Right2Work Community Interest Company. Together, we share a vision of delivering the finest opportunities in the kindest possible way. Our mission is to support and care for people and communities so they can learn, develop and thrive.

During 2025-26, Oaklea Trust provided 10,406 hours of care each week to 119 customers. Right2Work supported 361 individuals through a wide range of learning, employability and progression programmes, helping people develop skills, build confidence and move towards sustainable employment.

The Group continues to grow its reach, influence and impact. Through our fundraising, service development, partnerships and community engagement activities, we create new opportunities for the people we support and the communities we serve. The 7 Keys to Citizenship remain at the heart of everything we do, guiding our decisions, shaping our culture and informing our approach.

Our Trustees and Non-Executive Directors play a vital role in ensuring effective governance, safeguarding our people and resources, and supporting the organisation to achieve its strategic objectives.

We are seeking an experienced, collaborative and values-led leader who can provide effective governance, lead and develop the Board, and build a strong partnership with the Group CEO. The successful candidate will inspire confidence, encourage open and constructive dialogue, and bring both support and thoughtful challenge. They will help ensure Oaklea remains ambitious, financially sustainable and focused on delivering the greatest possible impact for the people and communities we serve.

Above all, we are looking for someone who shares our values: someone who celebrates diversity, values the contribution of others, and leads with kindness, integrity and inclusion.

We are proud of what we have achieved together and excited about the opportunities ahead. If you share our commitment to creating opportunity, supporting people to reach their potential and improving lives, we would be delighted to hear from you.

Thank you for your interest in Oaklea. We hope this pack gives you a clear sense of who we are, what we aspire to achieve, and the important role our next Chair will play in helping to lead the next chapter of Oaklea's journey.

Robin Talbot, Interim Chair



Jenna Hall, Group CEO





About The Oaklea Group

The Oaklea Group is made up of the charity, Oaklea Trust, and its commercial arm, Right2Work. Together, they support people and communities to learn, develop and thrive through person-centred care and support, learning opportunities, and pathways into employment.

Our vision – We deliver the finest opportunities in the kindest possible way

Our Mission – To support and care for people and communities so they can learn, develop and thrive

Our Values – Individuality, independence, interdependence, rights, respect, dignity, privacy, partnership, choice

The Oaklea Trust is a charitable organisation whose purpose is to give vulnerable people the opportunity to live and work as independently as possible within their community. Established in 2002 and based in Cumbria, County Durham and Northumberland we support disabled, disadvantaged and vulnerable children and adults. Our charitable work supports people of all ages who have Learning Disabilities, Physical Disabilities, Mental Health needs, and/or Dementia. We typically offer:

- Supported Living – Provision of care and support to people in their own homes – CQC Regulated
- Care Homes – Residential care for those who need it most – CQC Regulated
- Learning2Live – An alternative to residential college for young adults with an Educational Health Care Plan – Not regulated
- Community Works – Provides property and gardening maintenance services to our own premises and the local community and have built in an apprenticeship scheme – Not regulated

Right2Work is a growing and thriving organisation that carries out a diverse range of activities across Cumbria and North Yorkshire and increasingly in the North East. Founded in 20011, Right2Work is a Community Interest Company (CIC) and is part of the Oaklea Group.

Whilst Right2Work's portfolio is broad and diverse, all programmes can be grouped into one of three areas:

Employment

- Restart: Provides intensive support to help people into sustained work.
- Connect to Work: A government-funded programme awarded to deliver supported employment services across Cumbria, aiming to break down barriers and help people with health challenges or disadvantages into sustainable work.
- Revision: Commercially supported programme designed to support people back into work.

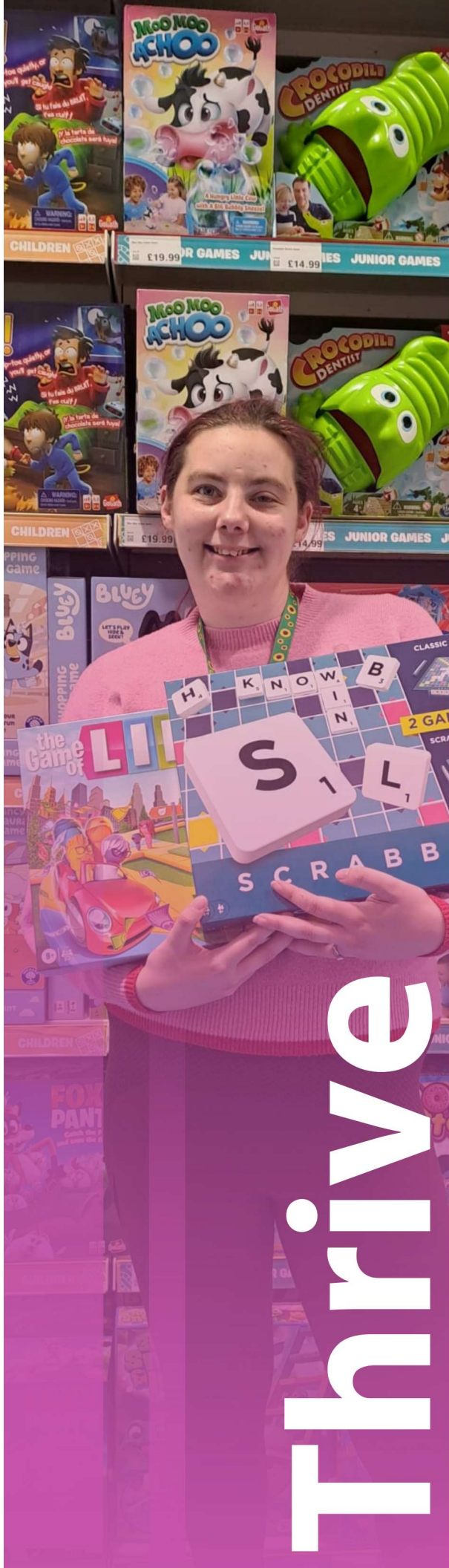
Learning and education

- Future Choices: Gives adults with Learning Disabilities the chance to develop personal and life skills through a personalised programme which includes travel training, employability skills and work tasters.
- Supported Internships: A study programme for 16-24-year olds with an Education Health Care Plan who want to work but need extra support to do so.
- Alternative Provision: We have recently been added to the Framework for provision of education for those no-longer in mainstream education.

Commercial

- Appleby Hub: This café, shop and community space provides opportunities for people to learn about working in a commercial catering environment.
- The Furniture Warehouse: Recycling and upcycling household items. Learners obtain essential workplace skills in health and safety and communication.





The Oaklea Group has approximately 360 employees and the Head Office is based in Kendal. We have a second registered office and training space in County Durham and further office and learning environments in Barrow in Furness, Carlisle, Appleby and Skipton. Each week, the team provides around 119 Customers with over 10,000 hours of care and support and around 361 Learners with opportunities to develop skills and gain employment.

The following are the major funders of our work:

- Local Authorities
- NHS/ICBs
- Central Government
- Private Organisations and individuals
- Trusts and foundations

We are currently looking to attract more income from corporate supporters, individuals and grant makers.

The operational teams are supported by a small Central Services Team, predominantly based in Kendal, that comprises of the required executive functions, Finance, HR and administration.

About our Governance

The Oaklea Trust is the sole shareholder of Right2Work and, as such, retains ultimate control and oversight of the CIC. This oversight is exercised in a proportionate and thoughtful way. An Operating Agreement, that details how the two boards work together, their relationship and responsibilities, is in place and is reviewed periodically by both boards.

The Agreement has been developed to provide clear governance whilst ensuring Right2Work has the space to operate successfully, confidently and responsibly as a trading organisation. Right2Work offers a platform for innovation and creativity and has a target to become a £5m entity within the next 5 years, with £2.5m coming through its commercial arm.

Both entities enjoy shared use of premises and Central Services Team. The CIC pays up to the full cost of what it uses and services can be relocated if needed.

People

Two or more Trustees also sit as Non-Executive Directors (NEDs) on the Right2Work Board. These Trustees/NEDs, together with the Group CEO and Finance Director are responsible for updating the Oaklea Board on the CIC's activities, progress, financial position and impact.

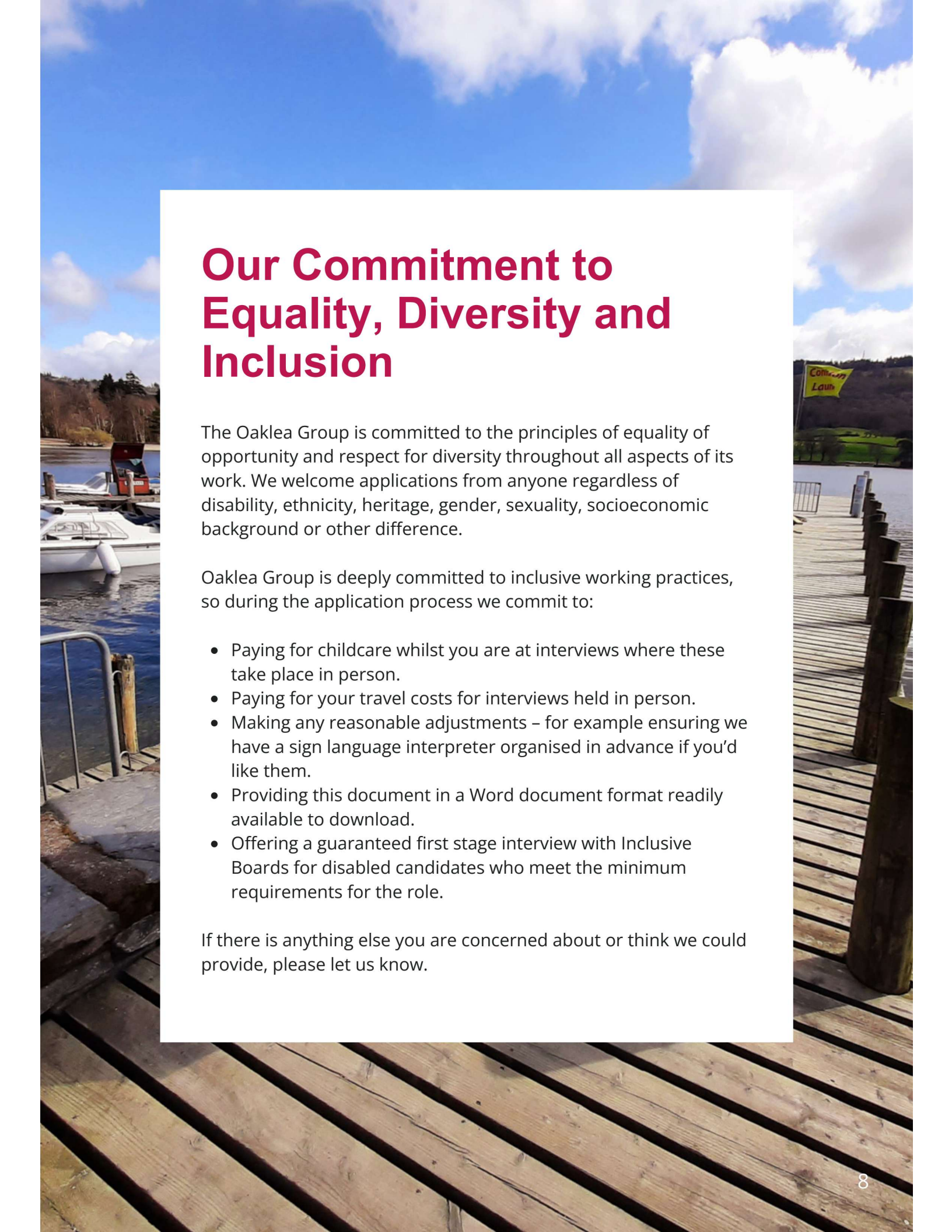
Right2Work employs its own operational staff and secondments can be offered where beneficial. Right2Work is responsible for all employment-related costs for all Right2Work contracted team members.

Right2Work NEDs benefit from the freedom to contribute their expertise, explore and pursue new opportunities, and actively grow and develop the organisation, all while shaping the Oaklea Group's social impact and helping it reach more beneficiaries

What this means for the Chair and Trustees

Trustees have clear oversight without micromanagement, strong protection of assets and reputation, and confidence that risks and finances are well controlled. The Chair of The Oaklea Trust meets with the Chair of Right2Work and the Group CEO, to ensure alignment and benefit to both entities.

A joint Finance Committee meeting takes place quarterly. The agenda typically follows three distinct sections, Right2Work, Oaklea Trust, Group Governance and Risk. Currently this committee is chaired by the Vice Chair of the Trust.

The background of the page is a photograph of a serene lake scene. In the foreground, a wooden pier with dark posts extends from the bottom left towards the right. To the left of the pier, a white boat is docked. In the distance, a yellow flag with the words 'Common Law' is visible on a hill. The sky is blue with scattered white clouds.

Our Commitment to Equality, Diversity and Inclusion

The Oaklea Group is committed to the principles of equality of opportunity and respect for diversity throughout all aspects of its work. We welcome applications from anyone regardless of disability, ethnicity, heritage, gender, sexuality, socioeconomic background or other difference.

Oaklea Group is deeply committed to inclusive working practices, so during the application process we commit to:

- Paying for childcare whilst you are at interviews where these take place in person.
- Paying for your travel costs for interviews held in person.
- Making any reasonable adjustments – for example ensuring we have a sign language interpreter organised in advance if you'd like them.
- Providing this document in a Word document format readily available to download.
- Offering a guaranteed first stage interview with Inclusive Boards for disabled candidates who meet the minimum requirements for the role.

If there is anything else you are concerned about or think we could provide, please let us know.

Chair of the Oaklea Board of Trustees

As Chair, you will energise and empower the Board and the Group as a whole. You will foster a culture of openness, collaboration, and constructive debate. You will inspire confidence and ensure the highest standards of governance, integrity and accountability.

You will also help shape the Group's future impact, supporting our mission to reduce inequality and create opportunities for people and communities to thrive. Through your strategic insight and advocacy, you will help extend our reach, strengthen partnerships and ensure more people can access the care, support and opportunities they need and deserve.

Primary Objectives

To provide leadership to the Board of Trustees ensuring the Board steers the charity towards its long-term ambitions, vision and mission and in line with Charity Commission guidelines. Guide the Board in setting the charity's direction and strategy.

To work closely with the Group Chief Executive (CEO) and the Chair of Right2Work to make sure the Board, Non-Executive Directors and the Executive Team work together to deliver the Group's strategy.

To uphold, develop and realise the charity's aims in line with our mission, vision, values, and legal responsibilities. Promote a culture of teamwork, where the Board, Chair of Right2Work and Executive Team work in a collaborative way that reflects our values.

To support and oversee the Group CEO's performance. On behalf of the Board, support the Group CEO to lead effectively. This includes setting clear objectives and participating in annual performance reviews.

To empower every Trustee and the Chair of the Board of Right2Work to help get the best from every Trustee and Non-Executive Director by encouraging everyone to bring their unique talents and skills. Encouraging Trustees to work with and support relevant team members, volunteers and stakeholders where appropriate.

Main Responsibilities

The Chair of the Oaklea Board of Trustees will:

Ensure the Board functions effectively:

- Chair Board meetings fairly, and encourage everyone to contribute, finding agreement where possible and keeping discussions on track so that clear decisions are made.
- Work with the Group CEO to enable the Board to focus on the most important issues and goals.
- Support the recruitment of new Trustees and focus on retaining a diverse Board in succession planning.

- Ensure Trustees receive a thorough induction and have ongoing training, development and regular appraisals.

Guide Oaklea Trust's strategic direction:

- Make sure the Board supports the Executive to deliver the agreed strategy.
- Support and enable Oaklea Trust through your connections to build partnerships that amplify our impact. Encourage fellow Trustees to use their networks as well.
- Promote a commercial mindset to help raise funds and to make good investment decisions. Agree risk appetite for these decisions and be prepared to seek return on investment opportunities to grow impact over time.
- Keep up to date with sector-relevant legislation and regulatory developments e.g. equity-based rights, health and social care, equality, inclusion, accessibility and the not-for-profit sector.
- Manage the relationship with the Group CEO on behalf of the Board.

Ensure governance oversight:

- Work with the Board so that the charity is managed responsibly and in line with regulatory requirements.
- To ensure an effective governance framework for sub-committees.
- Assure the charity's funds are being used effectively.
- Ensure that the right systems and culture are in place for effective risk management and safeguarding.
- Make sure the Board engages with and is accountable to the people we serve and those who support us.

Represent Oaklea Trust internally and externally:

- Recognise your role in opening doors with others to build awareness of Oaklea Trust's mission.
- Act as an ambassador for Oaklea Trust.
- Work in partnership with the Group CEO to raise Oaklea Trust's profile and make more people aware of our work.
- Ensure visibility at events and in wider work that increases the profile and visibility of both the Board and the Trust/Group as a whole.

Evaluate and support the Chief Executive:

- Form a strong, effective relationship with the Group CEO to enable the Board and executive to function well within their stated roles.
- Be available to the Group CEO to discuss emerging issues and successes. Offering advice, support and leadership, working together to resolve and challenge issues.
- Provide leadership, guidance and support to the Group CEO.

Champion the leadership of Committees:

- Ensure Committees are well chaired, and key issues are discussed at the Board.



Person Specification

We are seeking a new Chair of Trustees who can bring the following experience and capabilities to the role. We recognise that lived experience can offer valuable insights that greatly enhance a role like this, especially when combined with professional expertise.

Experience/Background:

- Experience of strategic leadership and governance within an organisation of equivalent size and complexity to Oaklea Trust, ideally within a Group structure.
- A track record of driving growth and innovation, with the ability to apply insight to support the achievement of Oaklea Trust's strategic objectives.
- Understanding of the challenges associated with leading and delivering regulated services and the management of the associated risks.
- Ability to constructively challenge and hold space for compassionate and constructive conversations.
- Financial and commercial acumen, including experience in financial planning, oversight, risk management, and the establishment and monitoring of systems of control and accountability.
- Ability to scrutinise and manage financial risk, ensuring long-term financial sustainability and safeguarding against fraud.
- Ability to open doors, build networks and maximise opportunities with a range of stakeholders, funders and partner organisations.
- Previous trustee and/or Chair/Vice Chair experience is desirable.

Skills:

- Excellent chairing and leadership skills, fostering effective decision-making and constructive debate.
- Ability to build positive relationships and a collaborative working environment, engaging openly with trustees, staff, and stakeholders.
- Analytical skills, with the ability to weigh conflicting opinions, assimilate complex information quickly, and communicate decisions clearly.
- The ability to inspire, influence and communicate effectively with diverse groups.
- Ability to build a positive working relationship with the Group CEO, providing appropriate challenge and support to help them effectively lead the charity.
- Comfortable using digital platforms for communication, decision-making, and accessing board materials.
- Highly effective at drawing on the skills of others, empowering all to contribute to discussions, taking action and decisions.
- Excellent interpersonal skills, including the ability to engage and influence with a range of senior stakeholders diverse in sector and profession.

Personal Qualities:

- Strong commitment to Oaklea Trust's values – Individuality, independence, rights, respect, dignity, privacy, partnership, choice.
- High degree of personal credibility and integrity, with a track record of openness and honesty.
- Pragmatic, with sound judgement and a calm, measured approach to duties and responsibilities.
- Evidence of personal and professional commitment to equality, diversity, and inclusion, and to engaging with the full range of Oaklea Trust's stakeholders.
- Resilient, positive, and able to deal constructively with differences of opinion.
- Willing to travel to the Group's services and to represent the Group across the North and beyond, as/when required.

Additional Information

Time commitment

The Board meets 4 times per year, typically in-person with occasional online meetings if required. Board meetings typically last 3-5 hours and are usually held in the morning, with lunch offered to all attendees. We occasionally add on learning and development sessions, to help raise awareness of changes in legislation, regulatory requirements and more.

We also hold an Annual General Meeting in-person, usually in October / November. We also hold an annual informal meeting to provide an opportunity for the Board of Oaklea Trust and the Board of Right2Work to get to know each other and have an opportunity to meet the senior team.

The Chair will have regular contact with the Group CEO, the frequency and format of which will be mutually agreed upon. For example, currently the interim Chair and Jenna Hall have a 30-minute telephone meeting once every three weeks or so. The previous Chair and Jenna used to speak fortnightly.

In addition to this, we encourage all our Board members to visit services to learn more about our work and impact.

The time commitment of this role is estimated at 1 - 2 days per month, on average.

Location

Currently, in-person Board meetings and the AGM are typically held in Kendal or Appleby-in-Westmorland. However, there is an appetite to split meetings more evenly between the North East and the North West in future. This reflects our spread of services across both regions and supports the participation of all Board members. Hybrid or fully online meetings are possible when required.

Term of appointment

Currently our Articles of Association do not state maximum terms for Trustees. The Board has expressed that they would like to revise and update our Articles of Association, with a view to introducing maximum terms.

Remuneration

This is a voluntary role. Reasonable expenses such as travel, overnight accommodation, evening meal can be claimed in line with our expenses policy. Lunch is typically provided at in-person meetings.

Conflicts of interest

All candidates will be asked to declare any conflicts of interest. These will be examined to see if any actual conflicts exist and appropriate steps taken as needed.

Disclosure and Barring Service (DBS) Checks and references

Any offer will be subject to a satisfactory DBS check and references.



How to Apply

The recruitment process is being undertaken by Inclusive Boards on behalf of Oaklea Trust. If you wish to apply for this position, please supply the following by **11.59pm on 27/09/2026**:

- A detailed CV, setting out your career history, with responsibilities and achievements;
- A cover letter (maximum two sides of A4) highlighting your suitability for the role for which you're applying and how you meet the person specification. Please note that the cover letter is an important part of your application and will be assessed;
- Details of two professional referees together with a brief statement of their relationship to you and over what period of time they have known you. Referees will not be contacted without your prior consent

Please consider filling out our diversity monitoring form. The information provided to us is confidential, stored securely and separately from your application, and is only used to ensure we are meeting our obligations for equal opportunities under the Equality Act 2010.

If you have further questions after reading this pack, please email
Oaklea@inclusiveboards.co.uk or call 0203 963 8802.

Please visit
www.inclusiveboards.co.uk/opportunities to apply online or send your CV and cover letter to
Oaklea@inclusiveboards.co.uk.

INCLUSIVE BOARDS

About Us

Inclusive Boards is the UK's leading board diversity practice. We have worked alongside over 300 organisations to provide support with Board recruitment, development and governance reviews. We strive to be at the forefront of equity and diversity, and believe that everyone should be represented at Board level. Additionally, we also provide bespoke training sessions on a variety of subjects including personal branding, inclusive recruitment practices and board structures and governance as well as delivering leadership development programmes for underrepresented leaders across a range of sectors.

Contact us today

To improve diversity on your Board please don't hesitate to contact us via hello@inclusiveboards.co.uk.

To join a Board, sign up to become a candidate via our website and be notified of the latest opportunities as and when they become available.



www.inclusiveboards.co.uk



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