







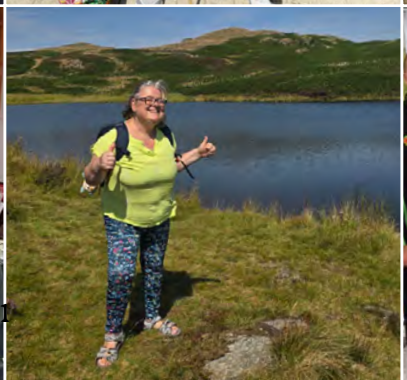











Oaklea

Supporting stronger communities

right2work

part of the Oaklea Group

Annual Report 2026

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Two years ago, in our 2024 Annual Report, we set out five themes which are fundamental to us in delivering our mission in the years to 2028; we're pleased to announce progress against each of these. Our five themes are:

1. Deliver Outstanding Care, Learning and Personal Development
2. Attract, Develop and Retain High-Quality Team Members
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5. Enhance our Governance

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Celebrating Our Progress and Looking Ahead

Oaklea
Supporting stronger communities

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Introduction...

Oaklea Supporting stronger communities
right2work part of the Oaklea Group

From our Group CEO and the Chairs of our Boards — Oaklea and Right2Work

As we reflect on 2025-26, we do so with pride in what has been achieved and gratitude to everyone who has contributed to our success. Across Oaklea Trust and Right2Work, our focus remains simple: enabling people to live with greater independence, confidence, opportunity and choice.

Throughout this report, you will meet some of the remarkable people we support and learn about their journeys. Their experiences remind us that true impact is measured not only in numbers, but in lives changed, aspirations achieved and opportunities created. Whether supporting someone to move into their own home, gain new skills, become more involved in their community or secure meaningful employment, our teams continue to make a difference every day.

During the year we supported many individuals to learn, develop and thrive through new housing, employment, activities, holidays, volunteering, skill-development and more. The stories captured in this document are only a few of our brilliant success stories — do keep an eye on our social media and websites to find out more about what's happening every single week.

Alongside these outcomes, we have strengthened the foundations of our organisation. We have invested in leadership, safeguarding, workforce development, digital transformation, and governance, while also securing new contracts, expanding our presence across the North of England and developing new opportunities for future growth.

We have also had a change in leadership of the Oaklea Trust Board. After 10 years on the Board and 7 as Chair, Chris Harris stepped down in February 2026 and Philip Smith as Vice Chair in March 2026. Derek Ridgway has taken on the role of Chair of the Finance Committee and Interim Vice Chair and we are currently working with Inclusive Boards to recruit a new long-term Chair to take over from Robin Talbot who has assumed the position on an interim basis. Both Chris and Philip gave their time and expertise generously and we thank them for their service and hope they are now enjoying their free time. And, after over 27 years, we said goodbye to Sue Green, the Executive Director of Right2Work and previously a Director of Oaklea. Sue was central to the establishment of Right2Work and had oversight of our Care Directorate for many years.

Overall, 2025-26 was a year of change, growth and development. Central to every success, milestone and noteworthy moment is the dedication of our colleagues, volunteers, Trustees, Non-Executive Directors, partners, funders and supporters. Together, we continue to build an organisation that is ambitious, sustainable and centred on the people we exist to serve.

Thank you for being part of our journey.

Robin Talbot, Julia Wood and Jenna Hall



Robin and Jenna



Julia

People's Experiences

Hearing about the experiences of those we support highlights the impact we can achieve together. Their perspectives are essential in understanding how we can best align with their goals, aspirations, and provide unique opportunities for growth and development.



Right2Work — Driving Ahead with Thomas

Thomas Armstrong: *"My time at Right2Work has offered me a varied experience, which I have thoroughly enjoyed and gained many skills. I have felt fully supported when it was needed and have moved on to be confident in needing no support in placement by the end of the internship. I have learnt new skills and gained more confidence in myself and my abilities. I look forward to gaining paid employment."*

What Mum Ann says: *"The whole process has been amazing, especially seeing Tom's confidence grow. Tom believes in himself in terms of being ready to get a job now. Tom has been able to be Tom in placements, not seen for his disability."*



Finding my way — Chloe (Right) above with Darci

The Impact of the Right Support at the Right Time...

"I moved into my home in the Autumn of 2025, and the support I have had has made a real difference to my life. I'm able to do my own cooking — sometimes with support — and I really like making chicken korma. I get out and about more now, like trips to Morecambe and Blackpool Pleasure Beach with the support of the care team. It's allowed me to do things I might not have done by myself. I'm also on the Right2Work Future Choices programme, and again this has got me out and about, and I get to do things I otherwise wouldn't do. In the near future — or somewhere down the line — I would like to be able to move back to where I am originally from." **Chloe.**

Achievements and Performance Review





Right2Work supported 361 individuals across a range of learning and employability programmes

Oaklea Trust provided 119 individuals with 10,406 hours of care a week

During 2025-26, the Oaklea Group provided care, support and development opportunities to both Customers and Learners.

Right2Work programmes help learners to develop skills, increase confidence, and progress towards sustainable employment. The programmes delivered included Supported Internships, Restart, Connect to Work, Future Choices, Access to Work, and Community Choices, The Furniture Warehouse and Appleby Hub.

Over the year:



67 individuals were supported into employment by Right2Work; this is equivalent to just over 40% of those we are seeking to place with employers and is an incredibly positive result.



1,665 furniture collections were completed, and 198,030 tonnes of materials were processed, with over 72% of collected items being diverted from landfill, supporting our commitment to social & environmental responsibility.



Appleby Hub increased income through the café and shop by over £22,500, meaning many more satisfied customers, supported artists and community connection.



Over 60 employees from 8 different employers attended training and development sessions.

In addition to the above services which we have delivered for many years, we have won new contracts, including becoming part of the Inspira-led consortia that will deliver Connect2Work for Cumbria; we are the lead partner for the Supported Employment Quality Framework. This important work supports our commitment to enabling people to achieve their goals and aspirations.

Deliver Outstanding Care, Learning & Personal Development



Data strategy planning session

Digital Transformation

Since our last report, we have continued our journey of digital transformation. We have further identified and developed our priorities and begun to introduce and deliver our Digital Strategy. We have taken a targeted approach and will, overtime, be working through each area of the Group.

Delivering Care and Support

Focusing specifically on care delivery to date, we have created better oversight with the use of technology and reporting. This means we have improved operational and financial oversight of both what is being delivered and its impact. We have developed the systems we are using, which mean we are collecting higher quality data and can now present it more clearly, in dashboard format, and learn from it more easily. Our further aims are to ensure the 'flow' and 'visibility' of information and data is with the right people at the right time to make informed decisions, enabling good delivery of education, opportunity, care and/or support.

Gavin tells us about his experiences of home, choices and preferences and his team support him volunteering in the community:

"It is my home. I feel safe, and the staff are kind to me."
Gavin





Gavin gets out of the car to head to the day centre

Family is very important to Gavin

Catherine (Gavin's sister) and Andrew (his brother) said:

"We live in Bristol, so visits are not as frequent as we would like, but the staff are happy to facilitate contact, ensuring he can come and stay with us, organising travel and time for this. The staff are active in recognising his talents and interests and always support him to enrich his life."

Ruth Hall and Team Discuss the Importance of Choice, Autonomy and Control



Ruth Hall



What does it mean to support people with their choice and autonomy?

Ruth: *"When individuals wish to do activities, it is important to facilitate this as it promotes positive mental and physical well-being; it empowers them to be part of a community, promotes their independence and can lead to learning new skills, making new friends and can lead to another new experience. The team pull together to ensure Gavin is living his best life and that he is accessing all he can in his community."*

Oaklea Support Worker Konrad said:

"I support Gavin to maintain his independence, make his own choices and take part in activities that are meaningful to him, promoting his confidence."

Oaklea Support Worker Sandra added:

"I helped Gavin settle into his home, so I got to understand his needs and his preferences and what was important to him. I continue to support him to make his own choices and encourage him to express his wishes and take part in his everyday activities and help promote his independence."

Oaklea Support Worker Liz said:

"Watching him become part of his community and simply seeing everyone recognise him and greet him with a cheery 'hello Gavin' is amazing, and I feel it has totally enriched his life."



Gavin with friends at the Food Bank where he volunteers

Making an Impact

Angus tells us about his Future Choices experience in Carlisle:

"I've really enjoyed my first year on Future Choices. I like that it's not too classroom-based and that we get out and about, because that suits me much better — especially when I feel supported. I've really liked working outside with the Ernest Cook Trust, getting my strimming and mowing tickets, helping on the farm, and learning practical skills. Learning independent travel has helped me feel more confident, and I'm looking forward to my second year."

Angus on Future Choices, Carlisle.

"There's been a great personality fit between Angus and his Work Coach, whose patient, understanding support has made a noticeable difference to his confidence and willingness to engage."

Sophie, Parent.



Mucking out



Alice and family, who featured in 2025 Annual Report, visiting Oaklea for a care review meeting and a chance to see their feature first hand

Our Heads of Care Reflect on the Past Year

Stella, our Head of Care in the Northeast:

"In the past year, we have looked at areas we could improve upon and set about trying to achieve them. One of these was to listen to what our customers actually want and how they can shape and influence the care and/or support we provide.

To do this, we relaunched the customer forums local to each area. We want customers to know that this is a safe place where they can discuss anything which is important to them, to feel valued and respected, to know their opinions are important, share their experiences and also to help promote friendships.

This is at an early stage, but at these forums, we promote awareness of safeguarding to advise customers how to report concerns and get help. We develop support for planning and feedback on social events too.

With the increase in the use of Artificial Intelligence (AI), we have looked at internet safety to raise customer awareness by sourcing training from the police, for example. We hope to expand opportunities for customers to learn about internet safety while still using AI to promote their own independence and feel empowered to use the internet safely and successfully."

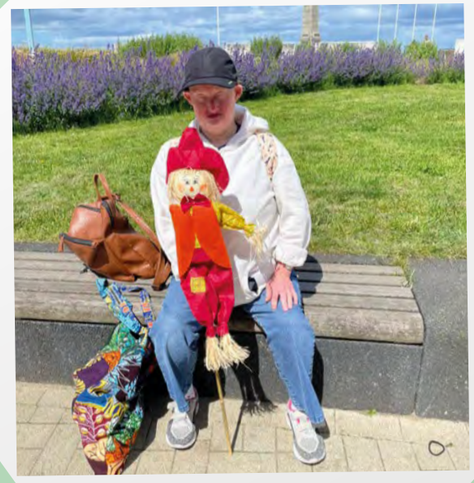
Alex, our Head of Care in the Northwest:

"The appointment of new managers has significantly improved the level of support available to colleagues across the service. With stronger leadership, colleagues benefit from receiving enhanced guidance and encouragement, enabling them to carry out their roles more effectively and confidently. Resulting in an increased positive impact on the quality and consistency of care provided to customers, ensuring their needs are met in a person-centred manner.

The introduction of the Head of Care and Area Manager roles has further strengthened governance and oversight. These roles provide managers with additional support, challenge, and professional guidance, ensuring that standards are consistently monitored and maintained. The enhanced management structure promotes accountability, facilitates timely improvements where required, and helps drive continuous improvement in the quality of care delivered."







"Mary from Northumberland celebrated turning 60 this year, including a huge birthday party, a holiday to Lapland, afternoon tea, and a holiday to the coast at Whitley Bay. Mary also started volunteering in a local shop, which she very much enjoys."

Stella, Head of Care NE.



Supported Living in the Northeast

Chris and Emma discuss impact, consistency and dedication

Emma — Team Manager gives us an insight into her role:

"I've been with the Oaklea Trust for 15 years and currently work as a Team Manager in Supported Living. What I love most about my role is the people — both the customers we support and the amazing team I work alongside every day. For me, it's all about helping people have choice, be as independent as possible and achieve the things that matter to them. Whether that's supporting someone to learn a new skill, reach a personal goal or simply enjoy everyday life, it's rewarding to see the positive difference the right support can make. I'm lucky to work with a team that is dedicated, caring and always willing to go the extra mile. Working together, supporting one another and celebrating the achievements of our customers makes the role incredibly rewarding. After 15 years, I'm still proud to do a job that makes a real difference and helps people live the lives they choose."

Chris — Support Worker Reflects:

"I've worked for Oaklea for around 15 years as a Support Worker. Over the years, I have got to know the people I support very well and thoroughly enjoy helping them achieve their aspirations, both within the community and while enjoying holidays in the UK and abroad. It's a wonderful experience to see how even the smallest things can make such a difference to their lives."

Internal Quality Audits

Our audits are completed annually for the services we provide. Emma and her team are a real testament to what can be achieved through personalised support.

From Róisín Burton, our Director of Care:

"Conducting our internal quality audit this year truly highlighted the impact and dedication of our team. They demonstrate genuine personalisation and have received outstanding audit results and feedback year after year."



Barnard Castle, from L-R: Michael, Chris, Keely, Amber and Emma

Learning — Right2Work Director Pete Bradbury Reflects on the Year

"I am incredibly proud of how far Right2Work has come over the past year, with the team demonstrating real growth, resilience and ambition while strengthening our partnerships, expanding our provision and, most importantly, continuing to create positive employment and learning opportunities for the people we support."

Claire Round, Supported Internships Manager:

"This year, the Westmorland and Furness Supported Internship Programme has supported learners in Barrow, Kendal and Penrith. We have worked with new employers including Identity LTD, James Fisher PLC and The Cartmel Grange Care Home, who all offered suitable and meaningful placements. We have further developed our relationship with Center Parcs in Penrith, which included Sally delivering an Employer Training session."

Future Choices Furness

Last year five of our learners progressed from Future Choices to a Supported Internship; one gained paid employment, and two have remained on Future Choices for a second year to continue to develop their employability skills.

We have created partnerships with the Ernest Cook Trust, the RSPB and Walney Community Centre to help the learners get real-life work experience with the RSPB in environmental maintenance and biodiversity management in the local area. The Ernest Cook Trust has helped develop woodwork and farming skills, including building bird boxes, planters and assisting with lambing.

Future Choices serves learners aged 16 to 25 with additional needs under educational funding, and through adult social care funding we serve learners aged 18+ with a care plan.

Outcome: Naomi Armstrong — Talent Acquisition Partner, Center Parcs:

"This is a great support for learners getting into the world of work — breaking down tasks and building confidence throughout."



Proud moment — Tabby gets certification



Future Choices hosting a sale event at their regular Kendal Market stall

Having started in Kendal, Future Choices has continued to go from strength to strength, expanding into Furness and Cumberland in April 2025. This growth has enabled us to create even more opportunities and provide greater support to learners across the areas.

A year on from expanding into Furness and Cumberland, Future Choices now offers two pathways: a Personal Development Programme and a Pre-Supported Internship Programme. The programmes run for up to five days a week across Kendal and Furness, supporting up to eight learners each day. It has been fantastic to see the programme grow and develop over the past year. We are really positive about the opportunities this continued growth creates for learners, helping them to build their confidence, develop new skills and work towards their future aspirations.

Michelle Bamber (Team Manager Furness), Rebecca Hewson (Team Manager Cumberland)** and **Matthew Douglas (Team Manager Kendal)

Multiply:
Maths and Literacy — Delivered

Multiply/ENGgage in Cumbria provides free, flexible and accessible English and Maths support for adults aged 18+. The programmes are designed to engage people who may have low confidence, limited qualifications or have previously been put off traditional classroom learning. Provision is practical and community-based, helping people develop essential numeracy and literacy skills for everyday life, employment, further learning and progression. Multiply initially focused on numeracy, including budgeting, money management and workplace maths, while ENGgage broadened the offer to include English and language skills. Delivery was flexible and personalised, including small groups, one-to-one support and learning in community settings.

Right2Work has also previously delivered Multiply across Cumbria, providing practical numeracy support designed to make maths relevant to work and everyday life.



Molly going places



Our Furness R2W Team put their heart into their roles.
Left to right: Ann Taylor, Charlotte (Charlie) Pearson, Michelle Bamber

Attract, Develop and Retain High-Quality Team Members

"I want to make sure all the customers remain as independent as possible in their daily living whilst providing the best support they can to achieve this."

Hannah Lupton, Team Manager, Kendal and Ulverston



Alex Williams and Hannah Lupton

Introduction and development of clear Pay Principles

We have developed and committed to a set of principles for pay and benefits each year, which are clear and consistent to our teams and colleagues.

These principles set out how the Oaklea Group determines pay and ensures fairness, sustainability, and transparency across the Group. With the aim of paying and offering benefits competitively within the Charity and Social Care Sector whilst recognising the need to operate sustainably to deliver the Group's mission.

Personal development

HR Manager, Helen Shaw, gives an overview of recent achievements and developments:

"Training compliance data for the Group is currently over 95% complete, with some teams at 100%. The Apprentice Academy has gone from strength to strength with partnership working with local colleges in the Northeast — Derwentside College and East Durham College and in the Northwest — Furness College and Kendal College. Apprentices have joined teams across County Durham, South Lakes and Furness to complement the teams at Oaklea."



Supported Internship Group South Lakes receiving their certificates



Apprenticeship success — George from R2W Community Works is recognised at Kendal College Apprenticeship Awards



Paige Monaghan receiving her Apprenticeship Award from East Durham College, with Lisa Clarey — Team Manager and Helen Shaw — HR Manager

Attract, Develop and Retain High-Quality Team Members continued...

Huge congratulations to Paige Monaghan, Hollie Lowery, Demmi Jones and Emily Newell who have completed their Level 2 Health and Social Care Diplomas and are currently studying towards their Level 3 Awards.

We welcome Jasmine McMahon and Edward Thompson, who have enrolled on their Level 2 diplomas. We wish them all the very best with their apprenticeship journeys with us.

Level 5 — Leadership and Excellence Programme

The current programme is almost drawing to a close, with many of the cohort successfully completing their Level 5 Diplomas in Leadership and Management.

Congratulations go to Sally Pattison (R2W), Jean Kilpatrick, Alex Williams and Bob Parkinson (Oaklea), who have completed their diplomas this year.

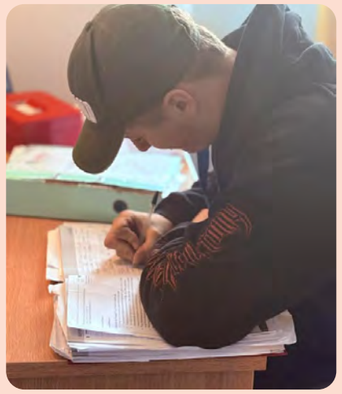
Oliver McGowan — Train the Trainer:

"Pete Embling, our internal trainer and member of our HR team, has completed the nationally accredited Oliver McGowan Train the Trainer programme. We are now working in partnership, identifying and planning the next stages of the training with autistic people and people with a learning disability to co-deliver the training. This nationally recognised programme will support Oaklea's commitment to high-quality workforce development and how learning is being embedded in practice for 2026-7 and beyond."

Helen, HR Manager



Pete with team members undergoing 'Dignity in Care' training at one of the many training sessions Pete facilitates



Edward — Furness, Lifestyle Co-Ordinator Apprentice

Development and Investment in the Care Directorate



Clockwise: Patricia Lee, Debbie Mould, Stella Crennell, Alex Williams, Jean Kilpatrick

Over the past 12 months, the Care Directorate has **strengthened its management structure** through the appointment of **Alex Williams as Head of Care** for the Northwest, **three new Area Managers across the North** and **additional Team Managers**.

This investment has increased leadership capacity, strengthened regulatory compliance and improved oversight of service quality, outcomes and impact. The new structure gives teams greater support to monitor performance, identify improvements and embed consistent, effective practice across services. During 2026–27, we expect this to deliver stronger assurance, greater consistency and clearer evidence of the difference our support makes. It will also help Oaklea respond to emerging needs and develop new services and areas of work.

"The Care Directorate has had a positive impact on the way that we work and has strengthened support for our colleagues and wider teams, ensuring that the organisation continues to deliver person-centred care."

Debbie Mould — Area Manager, Northeast

"It is easier to share ideas, learn from each other, and work together to make sure the people we support receive the best possible care and support."

Jean Kilpatrick — Area Manager, Northwest

"The introduction of the new Care Directorate means that managers have more dedicated support and mentorship to assist them with their roles. It has increased cross-area working across the organisation, sharing experiences and learning from one another."

Stella Crennell — Head of Care, Northeast

"The new Care Directorate is a wonderful group that provides valuable support, guidance, and oversight. Our team involvement has strengthened communication, supported managers and colleagues, and helped ensure high standards of care for the people we support."

Alex Williams — Head of Care, Northwest

"My new role as one of the Area Managers is a great opportunity to support Oaklea Managers and their teams and to contribute towards making improvements within the organisation."

Patricia Lee — Area Manager, Northeast



Taking the biscuit — a guaranteed tasty visit

Right2Work — Reflections from the Team

The Furniture Warehouse (TFW):

"TFW has continued to provide an opportunity for learners to develop a range of transferable skills in a real working environment by providing a valuable and effective service, collecting bulky waste items on behalf of the local authority and diverting over 143,000 kg (over 72%) of this waste away from landfill."

Chris Pantechis, Team Manager

Supported Internships/Future Choices Cumberland:

"The team across Cumberland continues to demonstrate dedication and hard work in achieving the best possible outcomes for all our learners within both programmes, Future Choices and Supported Internships. Future Choices is into its second year and is growing positively; all learners are fully engaged, and full attendance reflects this."

Rebecca Hewson, Team Manager

Supported Internships North Yorkshire:

"Over the past year, we have continued to strengthen our strong partnerships with Craven College and North Yorkshire Council, while developing new employer partnerships and opportunities for our learners. A particular highlight has been one of our learners securing paid employment with Skipton Building Society as a Junior Data Scientist, demonstrating the fantastic outcomes Supported Internships achieve."

Lucy Jolliffe, Team Manager

Employer Training — Building an Inclusive Workplace:

"Employer engagement and training activity has continued to grow, with bespoke on-site training delivered to numerous employers across Cumbria, alongside workshops presented at the Northern Edge Summit, Kendal College and the Social Value Group at Lakes College.

This work has strengthened employer understanding of inclusive recruitment and supported employment, with further opportunities secured through upcoming Connect to Work events hosted by the Chamber of Commerce and an employer engagement programme funded by Westmorland and Furness Council."

Sally Pattison, Team Manager



Dan working through data

Financial Reports

The Oaklea Group continues to be a people focused charity and we spend most of our funding on our most valuable asset, our employees.

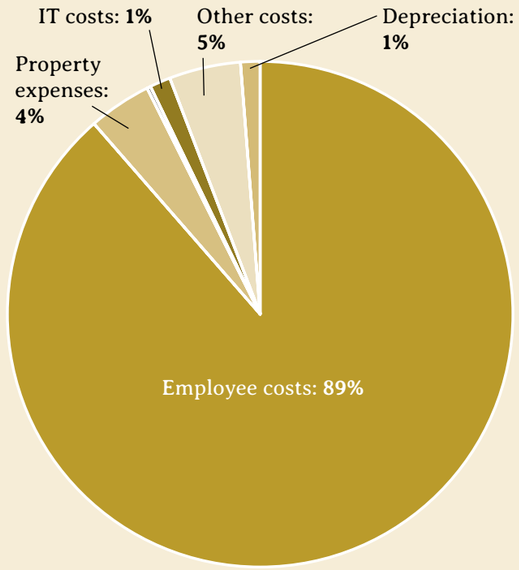
During 2025/26 this has meant investment into our Care Directorate and the development of internal Pay Principles which are a commitment to our employees that the way in which they are paid is always clear, fair and competitive.



Group Finance Director, Andy Darby

Oaklea
Supporting stronger communities

Oaklea Group consolidated accounts	2026	2025
Income	£'000	£'000
Donations and grants	51	9
Charitable activities	11,291	10,674
Total income	11,342	10,683
Expenditure		
Employee costs	9,843	9,219
Property expenses	448	451
Governance costs	27	25
IT costs	147	127
Other costs	508	534
Depreciation	138	156
Total Expenditure	11,112	10,512
Surplus	230	171



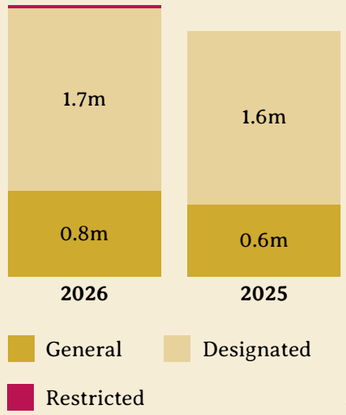
Oaklea Group Reserves

0.8m General reserves

+19.7% Growth in general reserves

2.4m Reserves

+10.4% Growth in reserves





Oaklea Group Financial Summary

"The release of the 2025/26 Annual Report coincides with my one-year anniversary at Oaklea, and it is therefore a good chance to reflect on the financial results and how the future is shaping up. As a group, we are proud to report a £230k surplus. It is not easy at the moment to deliver myriad opportunities to our customers and learners in a sustainable way, but our fantastic teams continue to do that.

Looking ahead, 2025/26 saw us begin to outline our data strategy, a key part of our digital transformation. Some of our earliest successes in this area revolve around the empowerment of our managers to tell the story of their financial results, by linking together key operational, HR and financial information. This all means that our collective grasp of where we are going, and how to measure and respond to experience along the way, strengthens day by day.

We're all excited for the next 12 months and continuing to deliver on our five strategic objectives."

Andy Darby,
Group Finance Director



67 Individuals into employment

*"This year, Oaklea Trust has provided **119 customers** with **10,406 hours of care per week**. Where necessary during the year, we've successfully attained increases in care hours and funding to ensure out customers receive the right level of support.*

Right2Work continues to diversify the Group's revenue by bring innovative ideas to life. One example of this is our Future Choices programmes which have developed from infancy into a well-established, pre-Supported Internship pathway. The Furniture Warehouse and Appleby Hub both continue to deliver growth and margin for the Group.

All of this has been achieved in difficult economic conditions, allowing us to invest in our long-term planning."

Derek Ridgway,
Chair of the Finance Committee

Right2Work Financial Summary

Right2Work continues to deliver excellent results for the Group which support the wider mission, achieving a **£269k surplus**, and **12.4% income growth**.

Our Learning and Employment areas continue to expand and thrive as we develop strong end-to-end pathways for people looking to gain skills and experience, and eventually move into the workplace. In the face of some big statutory changes and certain income streams coming to an end, the Employment areas have proven once again that they can innovate, and be a preferred delivery partner, **growing income by 18%** in 2025/26.

Our commercial ventures continue to offer alternative income streams which promote sustainability of the Group. The Furniture Warehouse has continued to play a critical role in the community by overseeing **1,665 furniture collections**, and diverting **72% of collected items from landfill**. The Appleby Hub is right at the heart of the Appleby community, and the popularity of the café and shop has seen income **grow by £22,500**. Both areas have done this whilst offering unique and valuable opportunities to our learners to gain new skills.

These are all fantastic achievements and a testament to the ethos of our teams. I've no doubt we'll see further success and expansion of our offering during 2026/27.

right2work
part of the Oaklea Group

Right2Work Accounts	2026	2025
	£'000	£'000
Income	1,972	1,755
Expenditure		
Employee costs	1,307	1,090
Purchases direct costs	108	70
Administrative expenses	42	68
Property and motor expenses	159	141
Legal, financial and professional	45	40
Depreciation and interest	42	31
	1,704	1,440
Surplus	269	315



+12.4% Income growth

Diversify our Revenue

New Contracts and Grants

New contracts have been applied for and won, inlcuding and not limited to the new Durham County Council Framework for Supported Living and the Framework for Alternative Provision in Westmorland and Furness. Preparation for the delivery and evaluation of these new work areas has started.

Further growth and innovation is expected throughout the current year and beyond, particularly in Right2Work C.I.C, where investment in two new additional roles will bring additional capacity to generate additional income, report impact and outcomes and, as senior roles, contribute to the development and progression of the Group as a whole.

Grant secured for Appleby Hub — Connecting Appleby, Thoughtful Tuesdays workshops — funded by National Lottery Community Fund.

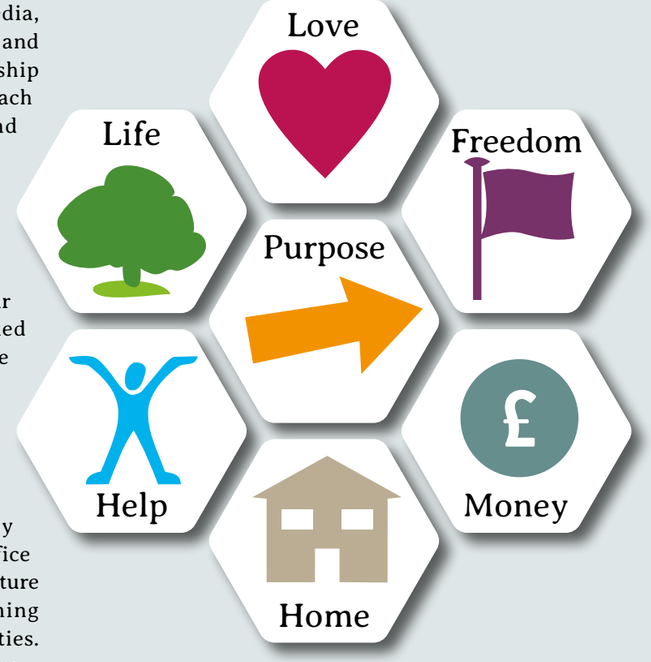
Grant secured for Holiday Activities and Food Programme 2026 in both Appleby and Kendal — funded by Department for Education / HM Government via Westmorland & Furness Council.

Grant secured for Appleby Hub and The Furniture Warehouse — soundproofing and heaters — funded by UK Shared Prosperity Fund and Rural England Prosperity Fund. Awarded by Cumbria Social Enterprise Partnership and administered by the Social Enterprise Development Team at Westmorland and Furness Council.

Develop the Oaklea Brand across the North of England

We continue to share stories and to build awareness of our work through social media, our website and other marketing activities and celebratory events. The 7 Keys to Citizenship remain central to our work and our approach to invest in fundraising, development and improvements.

In 2025 we significantly expanded our footprint across Cumbria, demonstrating growing brand recognition and demand for our services. The opening of our Carlisle office in April, followed by the launch of our Learning Centre in Kendal in May, marked major steps in deepening our presence. The Kendal site now provides dedicated office space, training facilities for employees and volunteers across the Group, and high quality learning environments for Future Choices and Supported Internship programmes delivered by Right2Work. By August, our new College House Barrow office was delivering Supported Internships and Future Choices programmes, further strengthening our visibility and impact in key communities. Together, these developments show how increased brand awareness is translating into tangible growth, broader reach, and meaningful opportunities for local people.



Enhance our Governance



Derek, Trustee, Vice Chair and Chair of the Finance Committee and Sarah, our Executive PA

How effective governance and accountability support Oaklea Trust and Right2Work C.I.C.

Effective governance ensures that Oaklea Trust and Right2Work C.I.C. are well-led, accountable and focused on delivering their charitable and social purpose. Trustees and Non-Executive Directors provide collective oversight for each respective operation, act within their powers and in the organisations' best interests, and ensure that decisions are informed, proportionate and properly recorded. The Executive Team and senior leaders are accountable for implementing agreed priorities, maintaining effective controls and providing timely assurance on innovation, new funding streams, safeguarding, quality, performance, risk, workforce and financial sustainability. These arrangements support safe, effective and person-centred services, promote equity in people's experiences and outcomes, and ensure that any queries or concerns are identified, escalated and addressed promptly.

The formal Operating Agreement sets out the governance and accountability arrangements through which Oaklea Trust and Right2Work C.I.C. work together. A plain-English summary, produced in spring 2026, is included in the induction of Trustees, Non-Executive Directors and senior leaders. This supports a shared understanding of legal duties, decision-making boundaries and collective responsibilities while preserving the distinct legal and operational accountability of each organisation.

The Group's Finance Committee provides focused scrutiny and assurance on financial performance, forecasts, internal controls, risk and sustainability. Its Terms of Reference, reviewed and updated in spring 2026, define the Committee's delegated authority, reporting duties and relationship with the Right2Work Board and Oaklea Trustees.

Strengthened governance is improving the quality, transparency and timeliness of decision-making across both organisations. Investment in the Care Directorate, additional Executive Team expertise and broader skills on both Boards have increased capacity to oversee regulatory compliance, safeguarding, service quality, workforce resilience and strategic and operational risk. This approach supports well-led, person-centred and sustainable services and strengthens public confidence.



Trustee Tale — Northumbrian Anna Baker-Cresswell

The drive for new Trustees is always an ongoing process. In 2026, one of our newest Trustees is Anna Baker-Cresswell from the Northeast.

"I'm a proud Northumbrian and have spent the last 20 years in the military charity sector. My beloved Mother had Parkinson's, and she died in 2004. I started a charity in her memory to bring Horticultural Therapy to the military in the UK. I'm really looking forward to helping to steer this excellent and ambitious organisation to support more communities in the North of England. I love public speaking, and my two happy places are talking to people about Horticultural Therapy, and my garden."

Anna Baker-Cresswell, Trustee



Anna joins the Finance Committee (with Trustees Robin & Derek)

Our Commitment to Safeguarding

Safeguarding is central to the Oaklea Group's responsibility to protect the rights, safety and wellbeing of every person we support. We are committed to creating a culture in which people feel safe, are listened to and know how to raise a concern in a way that is accessible to them. Our approach is person-centred and proportionate, recognising people's right to make choices and take positive risks while ensuring that safeguarding concerns are acted upon promptly.

During the year, we strengthened safeguarding capacity across the Group by establishing a network of Designated Safeguarding Leads. These colleagues have completed specialist training and provide advice, education and practical support to managers and teams. They help colleagues recognise and respond to safeguarding concerns, follow agreed reporting and escalation procedures, make appropriate referrals and work effectively with individuals, local authorities, health professionals, families, advocates and other partners.

The network also supports a consistent approach across services, ensuring that safeguarding responsibilities are understood and embedded in everyday practice. The safeguarding team also includes Trustee representatives across Oaklea Trust and Right2Work.

Our additional priorities this year have been to look at innovation and inclusion and enhance safeguarding communication.

This year we have improved our website to enable reporting and access to our policies, and we have rolled out pocket guides to our colleagues. The Group continues to develop safeguarding through induction, refresher learning, supervision and reflective practice. Reviewing concerns, incidents and emerging themes to identify learning, strengthen risk management and improve policies, procedures and training. Safeguarding assurance is supported through management oversight, internal quality audits and reporting to senior leaders and Trustees, as required. This sustained focus underpins our commitment to an open, accountable and learning culture in which safeguarding is everyone's responsibility.









Celebrating our Progress and Looking Ahead

The Trustees, Non-Executive Directors and Senior Team are committed to recognising all that has been achieved, celebrating progress, sharing innovative practice and building on what's gone before. A new internal document '*Celebrating our success and looking ahead*' was developed and shared in September 2026. It captures some of the key milestones achieved over the past 18 months and demonstrates a commitment to what's coming up in 2026-27 and beyond. A few highlights include:

Together, we have:

- Drafted a new shared vision for children, young people and families.
- Shared more about well-being and the wider support we offer team members through Mental Health First Aiders, Sovereign, Blue Light Card and Carers Card discount schemes and more.
- Introduced clear commitments to reviewing pay and benefits annually.
- Placed greater focus on training, learning and development — with our Group compliance, including introducing a Lunch and Learn programme for the team.
- Introduced staff surveys, developed our Employee Consultative Group and introduced and 'tea and chats with, Jenna' sessions.
- Secured Right2Work a new home in Skipton, North Yorkshire, the Learning Centre in Kendal, College House in Barrow and Bourne House in Carlisle.
- Renewed our Energy Savings Opportunity Scheme (ESOS) accreditation.
- Built key strategic partnerships with Skipton Building Society, Croppers, Centre Parcs and Cumbria Tourist Board and delivered employer training to over 50 participants.

Together, we will:

- Welcome a new Chair of Trustees.
- Keep safeguarding at the heart of what we do.
- Support more Future Choices learners to become more entrepreneurial.
- Reach more people, donors and funders by developing our brand, website and communications.
- Launch new impact reporting, data dashboards and more.
- Build new partnerships — if you would like to work with us, contact: customer.services@oakleatrust.co.uk to find out more about how to get involved and support our mission to help people and communities to learn, develop and thrive.

We have had a busy year and are looking to the future to achieve the 'we will' sections of our plans and priorities as a Group.

Thank you for reading our Annual Report — we hope it has given you an understanding of what we have achieved in 2025-26 and what we are excited about for the future.

Thank you







Oaklea
Supporting stronger communities

right2work
part of the Oaklea Group

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LOCAL AUTHORITIES

Cumberland Council
Westmorland & Furness Council
North Yorkshire Council
Durham County Council
Northumberland County Council

COLLEGES

East Durham College
Carlisle College
Lakes College
B&FC Group
Craven College
Kendal College – creating bright futures
Derwentside College

FUNDERS / PARTNERS

Community Fund
G4S – Group 4 Securicor
Cumbria Community Foundation
Department for Education
Department for Work & Pensions

matrix – quality standard for information advice and guidance services
CHAS – Accredited Contractor – CHAS.co.uk
Cyber Essentials
disability confident EMPLOYER

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