



MAKING LIFE WORK WITH MENTAL ILLNESS

Five Year Plan

2015-20

(As at January 2015)

Five Year Plan

Oakleaf Five Year Plan Jan. 2015 – Dec. 2020

Index

2. Introduction
2. Strategic Aims
4. Mission & Vision Statements
5. Profile
6. Client Groups
7. Client Services
9. Staff/Volunteers
10. Resources
11. Funding
12. Governance

Introduction

Developing Oakleaf over the next 5 years poses some obvious challenges, primarily around funding and premises but the purpose of this document is not to be overly constrained but to take a more "ideal" but calculated viewpoint.

To get to the point of producing this document we have consulted the full staff team, a number of our clients, and consolidated everyone's thoughts into what is broadly achievable within a framework of reality. We do not believe this has in any way stemmed ideas and creative thinking but has provided a breadth of thought and some clarity of focus.

What could Oakleaf look like in 2020?

The aim is to paint a picture of Oakleaf in 2020 and not to be too specific on metrics as these will be set in the ongoing annual business plans.

Strategic Aim

1. Profile

- I. Are seen by clients, commissioners, funders, local businesses, local authorities, the public and other local charities as the main mental health charity in Surrey
- II. We are actively using all forms of social media in innovative ways to reach and develop our supporter base
- III. We have at least 4 high profile patrons who take an active interest in supporting the charity
- IV. We have a number of flourishing partnerships with identified statutory and third sector providers e.g. Surrey & Borders Partnership NHS Foundation Trust, Guildford Borough Council, Waverley Borough Council and the local CCGs'.

2. Client Groups

- I. We are increasing unique individual client attendances by 500 per annum in the first two years then 200 per annum thereafter.
- II. We are able to help a more diverse set of Clients, with differing needs, conditions and age ranges and where appropriate working with a range of partners.
- III. We are delivering services to clients across three different boroughs
- IV. We will provide a range of services and support outside of normal office hours

3. Client Services

- I. We are able to offer a diverse range of services, which make a material difference to our Clients lives & we are able to measure positive impact
- II. We actively consult with our client group through a number of different methods and forums, offering them the services they need and want which are commensurate with the charities objectives

Five Year Plan

- III. We recognise that keeping people mentally well is a great achievement and that some of these Clients may struggle to gain paid employment. However, for those Clients who aren't far from employment, we aim help to a minimum of fifty per year them develop the confidence and skills enabling them to return meaningful employment.
- IV. We have a number of flourishing social enterprises where some clients have graduated through their training and are therefore remunerated for the work they undertake for Oakleaf.
- V. We will recognise the importance of an holistic approach which includes physical health in contributing to the maintenance of mental wellbeing through utilising the NHS 5 steps to well-being program.

4. Staff / Volunteers

- I. We are recognised within the third sector as a great place to work in south west Surrey for our staff and volunteers:
- II. Our staff feel that they have a career while at Oakleaf because we provide the opportunity for growth and development
- III. We have cover for all key staff roles so there is minimal disruption in the event of staff sickness or holidays and within this have also considered succession planning
- IV. Our staff are paid salaries, and receive benefits, which are at least in line with equivalent third sector organisations
- V. Our volunteers are provided with a strong support network and given the skills, experience and training to move to paid employment
- VI. Whilst volunteers are unpaid they are respected and given the same consideration as paid staff

5. Resources

- I. We have a building(s), which provides a long-term secure solution for the charity which meets all of our needs
- II. We have an income which meets our needs for sustainability and growth whilst building a surplus of six months operating costs

6. Governance

- I. We are demonstrating best practice Charity Governance and used as an example on how a charity should be run
- II. We have a strong and diverse Board of Trustees with a focus on our charitable aims and actively seek all service-users' views which influence decisions at Board level
- III. We are not afraid to try something new and to learn from the experience

Mission and Vision

Prior to launching into specific details we believe we should as a matter of periodic assessment undertake a review of our existing Mission and Vision, particularly if we are to undertake a radical overhaul of our services and direction. Every activity should ideally refer back to our Mission Statement and should be the point of reference for any future course of activity. We have therefore reviewed both of these statements and feel that the following are far more reflective of our work.

MISSION STATEMENT

We work to foster confidence and reduce social isolation by actively training, engaging and supporting individuals with mental ill-health to empower them to participate as active member of society.

Vision

To improve the lives of people managing mental ill-health in Surrey, promote awareness and reduce stigma.

For each of the areas outlined in “**What could Oakleaf look like in 2020?**” We have structured the remainder of the document into:

1. Profile
2. Client Groups
3. Client Services
4. Staff / Volunteers
5. Resources
6. Funding
7. Governance

For each Section, we have provided:

- What we want Oakleaf to look like in 2020
- Why it's important to the Charity
- What activities might we be able to do to take us to this position in 2020

1.Profile

Where do we want to be in 2020:

- I. Are seen by clients, commissioners, funders, local businesses, local authorities, the public and other local charities as the main mental health charity in Surrey
- II. We are actively using all forms of social media in innovative ways to reach and develop our supporter base
- III. We have at least 4 high profile patrons who take an active interest in supporting the charity
- IV. We have a number of flourishing partnerships with identified statutory and third sector providers e.g. Surrey & Borders NHS Partnership Foundation Trust, Guildford Borough Council, Waverley Borough Council and the local CCGs'.

Why this is important to the Charity?

For many years mental health has always attracted negative press through which stigma and prejudice have grown but Oakleaf wants to make a valuable contribution to changing that perspective. Furthermore, mental health has been unable to compete with other equally worthwhile charities, particularly those which support children and pets. We recognise that this has been partly fuelled by us not actively promoting and publicising our excellent work and going head-on to challenge the poor perception for people with mental health problems.

Times have changed and we have to take every opportunity to publicise our name and our work and whilst this can be undertaken with the support of the local press we are looking to all of our supporters and Trustees to embrace social media. We already have good Facebook and Twitter activity which are constantly updated by our communications department, and contributed to by the organisations Chief Executive. However, the need to connect with more people is a constantly moving feast and one which will ultimately lead to greater awareness for all types of funders and commissioners, thereby adding to the long term security, viability and relevance of the organisation.

What activities might we be able to do to take us to this position in 2020

Patrons As has been discussed many times we need to engage the support of a new/additional Patron/s. Penny Keith has been an excellent ambassador and supporter for us over many years and shows no signs of changing the status quo. We have recently been fortunate to gain the support of Shaun Attwood as a second Patron and are very pleased to have his energy, contacts and the networks he brings. Moving forward we would like engage with more high profile individuals or a senior member of the local business community.

2.Client Groups

Where do we want to be in 2020:

- I. We are increasing unique individual client attendances by 500 per annum in the first two years then 200 per annum thereafter.
- II. We are able to help a more diverse set of Clients, with differing needs, conditions and age ranges and mixed paying groups, and where appropriate working with a range of partners.
- III. We are delivering services to clients across four different boroughs
- IV. We will provide a range of services and support outside of normal office hours

Why this is important to the Charity?

1. Helping as many people as we possibly can will have a positive benefit for the community. Increasing the number of people we help will potentially

Five Year Plan

enable us to drive down the per-head cost, and thereby quoting a lower cost per visit to potential funders.

2. There are clients of particular ages or needs that we are currently unable to help and we feel these are key additional groups which Oakleaf can assist.
3. Not all clients are local to the Guildford area, so increasing our outreach services would help us reach many more remote and isolated clients.
4. We recognise that a number of other support services are not available in the evenings and over the weekend when individuals can be at their highest level of need. Additionally, as we expand our client base we recognise that some people may not have lost their employment and therefore services that can offer them support, but enable them to remain in work, are vital.

What activities might we be able to do to take us to this position in 2020 **Shift some focus to disadvantaged people**

Diagnosis Oakleaf's client group has always focused on individuals with mental health problems and more loosely those with special needs. During our day to day work this prescriptive client group can be a little too restrictive as our clients can often have a dual diagnosis. Furthermore, not everyone has always received a full diagnosis and may have been self-managing and medicating for many years. We are not suggesting our headline group should deviate away from mental health as this should remain our raison d'être, but on a case by case basis we have the scope to work with and support many more clients.

Young People Our listed age range covers those from 16 to 65 but in reality the majority of the client group average around 30-40 years old. We would like to engage more young people with the project but recognise that the range of activities we currently offer do not readily hook into this age group. Some preliminary work needs to be undertaken researching what are the best type of activities, training, education etc. which would be of value, and then secondly to advertise and market the potential to major referring agencies such as CAMHS, sixth forms, colleges, etc.

Employment Since inception we have delivered a variety of DWP employment contracts, (back to work schemes) either directly or in more recent years through Prime Contractors. As detailed earlier in this document re widening the range of our client group, we could have the potential to bid more widely for new work schemes as they arise. This would entail us developing robust partnerships with other local charities to achieve imposed targets, and warrant the employment of more staff within our Client Services team. To this end we will keep a watching brief on new projects as they arise.

3.Client Services

Where do we want to be in 2020:

- I. We are able to offer a diverse range of services, which make a material difference to our Clients lives & we are able to measure positive impact
- II. We actively consult with our client group through a number of different methods and forums, offering them the services they need and want which are commensurate with the charities objectives
- III. We recognise that keeping people mentally well is a great achievement and that some of these Clients may struggle to gain paid employment. However, for those Clients who aren't far from employment, we aim to help a minimum of fifty per year develop their confidence and skills enabling them to return to meaningful employment.
- IV. We have a number of flourishing social enterprises where some clients have graduated through their training and are therefore remunerated for the work they undertake for Oakleaf.
- V. We will recognise the importance of an holistic approach which includes physical health in contributing to the maintenance of mental wellbeing through utilising the NHS 5 steps to well-being program.

Why this is important to the Charity?

We recognise that a varied and broad range of activities are vital to ignite engagement and ensure ongoing commitment. Our longstanding and baseline training programs will continue to evolve in two parallel directions: a) vocational training, and b) social enterprises. Whilst these do not always fit neatly together they provide our clients with customer focused training, development of confidence and real progression to employment opportunities. This in turn enables everyone to see that training has a real and tangible outcome and not just to be undertaken with no real purpose.

The second and equally important aspect of our work is our enormous range of social inclusion activities. As detailed elsewhere these continually grow and we are always looking for new interesting and exciting activities to incorporate. They are of great value to our clients and the organisation as a whole as they safely challenge individuals to become more engaged, whilst stepping outside of their comfort zones; alongside helping them become active members of their own communities.

Finally, we believe that it is also important to demonstrate to funders and commissioners that we are challenging in our programming and not just following more traditional paths of occupational therapy.

What activities might we be able to do to take us to this position in 2020

Expanding creative activities

Creative Activities

Recent survey and feedback forums have indicated a number of requests for the delivery of creative based activities, specifically: pottery, sculpture, art and photography.

Social Enterprise:

Upholstery With the possibility of Oakleaf relocating in the medium-term there is the potential of allocating a much larger workshop area to our Upholstery department. However, in the short-term we are rapidly running out of space to store customers furniture before work commences and likewise prior to delivery, and if we are to develop, this situation needs to change.

Horticulture For a number of years we have provided a Horticultural service, commissioned by the general public which has primarily focused upon garden maintenance. In more recent years we have added hard landscaping to the range of commissioned work. This has been reasonably successful in generating work but we have continually struggled to deliver a project in the prescribed timescales to compete on a commercial level. Therefore, we will withdraw this element of our service delivery and continue to build upon a flourishing base of general garden maintenance, with an intent to secure more commercial contracts alongside our success with our Guildford Borough Council contracts.

Coffee Shop/Café With a view to introducing something new, challenging and with the potential to provide excellent ongoing PR opportunities alongside substantially elevating our profile, we propose the opening of a coffee shop/café.

Unlike upholstery per se there are excellent opportunities locally for more of our clients to transfer skills based within the catering industry, which could lead to mainstream employment. The market is of course flooded with similar establishments and we would need to exploit a USP which focused on what we were attempting to achieve, which could be akin to the very successful Jamie Oliver "15". We would need to ensure an excellent product and be extremely competitive with our pricings. We would also integrate the selling of some of the products which are grown and produced on our allotment and greenhouse.

We believe that one of the key areas to ensure success is location: high footfall is going to be so important for a venture like this. We would need to aim for a prominent high street position alongside other familiar brands, because we are competing with big brands which the public trust and most likely prior knowledge of the product they will be buying.

Physical Health Many of our clients struggle with maintaining their physical health and keeping their weight within a healthy range, we have helped in a small way by providing tai chi, yoga and a fitness class but these are only scratching the surface. We accept that part of the challenge is igniting an individual's motivation but the missing link is having an employee dedicated to pursuing this initiative, alongside education on nutrition and healthy eating.

Football Continuing in the theme of physical exercise there are a growing number of football teams specifically for people with mental health problems to which Oakleaf could potentially make a contribution.

Safe Havens One of the elements of Surrey County Councils & the Clinical Commissioning Groups draft 5 year strategy is to explore the setting up of Safe Havens in all 11 Boroughs across Surrey. The concept is one of providing venues which can be accessed and staffed out of hours for people who are feeling panicky, anxious and potentially in crisis but not severe enough to warrant hospitalisation.

It is clear that they are generally preventing any escalation of need or call on other services, specifically A&E and Secondary Care mental health services. The plan is for SCC to commission this service over the next 2 years and we aim to ensure we are in a good position to be able to compete for the contract locally.

4. Staff / Volunteers

Where do we want to be in 2020:

- I. We are recognised within the third sector as a great place to work in South West Surrey for our staff and volunteers:
- II. Our staff feel that they have a career while at Oakleaf because we provide the opportunity for growth and development
- III. We have cover for all key staff roles so there is minimal disruption in the event of staff sickness or holidays and within this have also considered succession planning.
- IV. Our staff are paid salaries, and receive benefits, which are at least in line with equivalent third sector organisations
- V. Our volunteers are provided with a strong support network and given the skills, experience and training to move to paid employment
- VI. Whilst volunteers are unpaid they are respected and given the same consideration as paid staff

Why this is important to the Charity?

As for all organisations our staff alongside volunteers are our best ambassadors and most valuable assets, and to this end it is important to recognise their input, enable them to feel valued and reward them in other ways beyond financial. This in-turn creates harmony, aids retention and contributes towards a positive healthy environment.

What activities might we be able to do to take us to this position in 2020?

1. Continue with annual appraisal structure moving to 360 reviews
2. Create more non cash rewards
3. Establish a training fund
4. Strengthen HR resources

Human Resources As the organisation grows, employment law and related policies become more wide-reaching the disproportionate time needing to be allocated to HR by the CEO is at times unrealistic. We propose that we outsource this function and contract to have 12 month cover on as needs basis, to address all HR and recruitment issues.

5.Resources

Where do we want to be in 2020:

- I. We have a building(s), which provides a long-term secure solution for the charity which meets all of our needs
- II. We have an income which meets our needs for sustainability and growth whilst building a surplus of six months operating costs and/or closure

Why this is important to the Charity?

- a) We recognise that the financial and infrastructure implications of a capital fundraising plan are huge but not insurmountable and this is something we will continue to explore as part of securing a long-term base. It is accepted that generally funders are not keen to fund rent, which in-turn places a demand upon our fundraising team. Whilst ownership is preferable we have to consider all options within the scope of continuing to develop our existing services.
- b) For all organisations cashflow is crucial to success or failure, and like many charities whom have some reliance upon fundraising income there can be many peaks and troughs to navigate. Therefore, to have a sound reserve in place is prudent and it can also provide feelings of security to both staff and external funders.
- c) To increase profit, build security and have the scope to accommodate new initiatives are vital for the continued growth and wellbeing of the organisation, thereby providing the ability to plan for the future.
- d) In earlier years of the charities existence there has been an over reliance on specific funding sources namely employment programmes, followed by trust fundraising; which individually leaves the charity vulnerable. The aim is to achieve a stable and wider funding mix, as with other sections of this plan this will contribute to the elevation of the organisation as a whole.

What activities might we be able to do to take us to this position in 2020

(It should be noted that many of the activities detailed below fall into more than one category e.g. "Funding" but this does not alter the defined intent)

Five Year Plan

Premises As detailed elsewhere we are now working toward a lease expiration of December 2018 which although a number of years hence gives us time to plan a secure move in years to come. Although it is recognised that we could continue a tenancy anywhere, there is a longer term preference to ultimately own a property and benefit from the security this offers, both in tenure and finance.

Our vision for our future property requirements will provide a more usable space for our major social enterprise activities, capacity to grow; better parking facilities and accessible outdoor open space which would create an area for clients to sit, relax and meditate and also for us to have space for the growing of vegetables and other produce that could be used within our coffee shop and perhaps sold at farmers market. Ultimately this could develop as another area of horticulture that would be of great benefit to some of our clients.

Transport We continually struggle with the delivery and collection of the large items of furniture. Whilst this is something we charge customers for we either have to use the Upholstery Managers car or one of the horticulture vans neither of which is desirable. Therefore, in the future this will be outsourced and charged direct to the customer.

Fundraising As has been illustrated since our inception charity fundraising is a crucial activity and having the right people in place as evidenced with the current Trust fundraiser can make a substantial difference to the organisations wellbeing.

Selling To aid to the success of developing all areas of social enterprise we should explore attaining the support of a Business Development worker who should be highly active in the community selling our projects to business. This can range from identifying and negotiating with Office Facilities Managers to secure upholstery work, to approaching businesses with grounds to undertake their maintenance contracts.

Counselling Our current counselling provision is very successful and is continuing to support many of our clients, with over 450 hours of one-to-one therapy provided this year. We are far from capacity with room usage and could easily engage more counselling trainees with a view to expanding the service. To enable ongoing development and essential growth we will secure external professional supervision, which to date has been provided in-house.

Mindfulness This area of self-help appears to be growing in interest for everyone not just our client group. We have an excellent trainer who has helped many of our clients address some of their issues. With the level of success and popularity we think there could be a potential to market this

service to a wider audience, and will aim to make this a commissionable service and income source for the charity.

6. Governance

Where do we want to be in 2020:

- I. We are demonstrating best practice Charity Governance and used as an example on how a charity should be run
- II. We have a strong and diverse Board of Trustees with a focus on our charitable aims and actively seek all service-users' views which influence decisions at Board level
- III. We are not afraid to try something new and to learn from the experience

Why this is important to the Charity?

To keep the organisation strong, focused and moving forward the Board of Trustees need to clearly consider risk but at the same time balance any potential risk aversion which could be present. Additionally, to support the operational team specialist skills such as law and property will provide strength, and help to drive down unnecessary cost, particularly with major projects e.g. new premises. We also recognise that the voice of the Service User is vital to enable those who define strategy to understand the needs, interests and desires for whom the services are provided.

What activities might we be able to do to take us to this position in 2020

We aim to continue the development of our client focus groups who it is planned will ultimately work at Board level supporting Trustees and staff in strategy going forward. We will also increase numbers and diversity of Board members alongside a broadening skill base.