



St Monica Trust

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2015/16

Annual Review  
2015/16



## OUR MISSION

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Working together to support and celebrate the lives of older people.

# FOREWORD

## by the President

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As the newly appointed President of the St Monica Trust, it is my pleasure to introduce the 2015 Annual Review.

I passionately believe in the great work carried out by the St Monica Trust. In accepting the position of President, my wish is to continue to contribute to the ongoing development of this special organisation.

2015 was very much a year of looking both to our past and to our future, as the Trust celebrated its 90th anniversary and appointed David Williams as the organisation's new Chief Executive.

A key part of David's appointment as Chief Executive was the creation of the five year Strategic Plan to help plot the future course for the Trust. The Strategic Plan was created following an extensive consultation programme with residents, relatives, customers, trustees and staff during the first six months of David's tenure.

“*An exciting future lies ahead for the St Monica Trust, full of innovation, sustained growth and building upon our relationships with residents, customers, their families and our staff.*”

The St Monica Trust has gained a reputation as a forward-thinking organisation and I truly believe that the introduction of this new five year Strategic Plan will continue this ethos.

Whether it's the development of The Chocolate Quarter in Keynsham, the introduction of the National Living Wage or indoor archery at Sandford Station, the last twelve months has been about establishing the foundations for what we want the Trust to look like in five years' time.

An exciting future lies ahead for the St Monica Trust, full of innovation, sustained growth and building upon our relationships with residents, customers, their families and our staff.

I can assure you that I will work hard with my fellow trustees and the senior management team to continue the Trust's excellent work.



**Charles Griffiths**  
President of the St Monica Trust

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## INTRODUCTION by the CEO

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If this Annual Review is your first insight into the services that the Trust provides, then I hope that your reaction is as positive as mine when I first walked through the gates of our Cote Lane retirement community in April 2015.

The more people I've met during my first twelve months in office, the more I've got to understand the special part that the Trust plays in so many people's lives. Even after more than a year with the Trust, I still feel incredibly privileged to work for this unique organisation.

We thought it apt to highlight the Roman numeral 'V' on the sundial that adorns the front cover of this Annual Review. Not only does it represent the number 'Five' in our five year Strategic Plan, but the 'V' also stands for the vision and values that have underpinned this wonderful organisation for the past 90 years.

“*Being a not-for-profit organisation means that the better we perform, the bigger the difference we are able to make to the lives of older people, wherever they live.*”

The pages inside the Annual Review have been designed to reflect the different elements that make up the Strategic Plan and highlight the positive impact that it is already having upon the lives of older people.

The Strategic Plan was created following an extensive listening programme, involving our residents, customers, relatives, staff and volunteers, and I would like to thank everyone who contributed to its creation.

As well as securing the future of the Trust, the creation of the Strategic Plan is also a timely reminder of the importance of staying true to the philanthropic principles on which the Trust was founded.

In a market dominated by private companies intent on profiting from the care and services that they deliver to older people, we're extremely proud of our charitable status. Being a not-for-profit organisation means that the better we perform, the bigger the difference we are able to make to the lives of older people, wherever they live.

This is why we are able to commit to outreach programmes, like the Community Fund to help disadvantaged communities and invest in new technology which will benefit future generations of older people, not just in the UK, but worldwide.



**David Williams**  
CEO of the St Monica Trust

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# OUR VISION

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It was Dame Mary Monica Wills' vision to buy a small rest home for 'five or six missionary friends' that led to the foundation of the St Monica Trust in 1925.

As the organisation heads towards its centenary, we've created a new vision for the Trust.

We hope it reflects the same mixture of wisdom and imagination displayed by the Wills Family in founding the charity all those years ago.

As an organisation we want to provide world class care, facilities and support for older people. As a result, we will be recognised for excellence, not only in our sector, but in service delivery across the board.

We want to find new and better ways to be responsive to our residents' and customers' needs, allowing innovation to flourish.

We also want to maintain sustainable, efficient and responsive estates, infrastructures and technology.

Lastly, and most importantly, we want to maintain a culture that recognises and celebrates our history.

Much may have changed over the last 90 years, but by recognising and celebrating our history, we will ensure that we always stay true to the principles on which the Trust was founded.

To paraphrase the Trust's motto, "Tempus Fugit, Caritas Manet" - time may have flown, but the love will always remain.





# OUR ROOTS

Throughout 2015, a number of special events were held to celebrate 90 years of community life at the St Monica Trust.

A total of seventeen "Gift of Years" events were held across all of the Trust's sites, which were attended by 621 residents, family, staff, trustees and volunteers.

All those who attended the events were encouraged to share their thoughts on what the Trust meant to them and their part in the St Monica Trust story. Many of these thoughts were written down on pennants that were specially created for the event and included comments, such as: "When I go home at the end of my shift, I know I have made a difference. A smile from a resident is worth more than anything."

Photos and artefacts from the Trust's past were also put on display, including the original silver trowel used to lay the Cote Lane chapel's founding stone in 1920 and Dame Mary Monica Wills' personal bible.

In bringing together the Trust's past and its future in this way, the "Gift of Years" events were not only a way of recognising the contribution that our residents, staff and volunteers make to life at the St Monica Trust every day, but also a way of preserving what it is that makes St Monica Trust so distinctive for generations to come.





# SERVICE

## eXplore

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eXplore is the Trust's very own feedback framework, which exists to listen to the views of everyone connected to the Trust and to make sure that they are heard within the organisation.

The programme has already been hugely influential in guiding the direction of our Strategic Plan over the next five years and it will continue to convey the voices of residents, customers, relatives, staff and volunteers alike.

In order for the Trust to remain relevant and successful, it's important to respond and adapt accordingly. That way, our services and how we work, fits around the needs of our residents, customers and staff and not the other way around.

As part of the eXplore programme, we're already creating village councils across all our sites. This will ensure that the needs and interests of residents and customers are represented and directly inform the development of their own communities.

The Trust's People Directorate, also host quarterly eXplore meetings for colleagues across all the Trust's sites. Lots of useful information has been shared and has helped shaped initiatives, such as the introduction of the National Living Wage, revamping our annual staff awards and establishing a new set of values for the Trust.

Our overall aim is to identify what we do well, what we need to do better and what we need to start doing in the future.



903

individual  
comments  
received



# SERVICE

## Good to outstanding

The Care Quality Commission is the independent regulator of health and social care in England. They make sure health and social care services provide people with safe, effective, compassionate, high-quality care and encourage care services to improve.

In the last twelve months, all of the Trust's nursing and dementia care homes, our care at home service, day service and care and support services at all four sites, have all been inspected by the CQC.

That's 480 members of staff, from four different sites located across Bristol and North Somerset, providing care for 400 residents and customers – all rated 'good' by the CQC.

We think that shows remarkable consistency throughout the organisation in terms of the training of our staff, their dedication and the quality of care they deliver.

But 'good' is only where we are now and we want to be an 'outstanding' organisation.

A key element of the Strategic Plan is about putting in place the structure to achieve this. We are a learning organisation and a 'Good to Outstanding' group has been created to review all aspects of the Trust's services, identify areas of excellence and ensure they are adopted across the organisation.

If, at some point in the future, we achieve the transition from a 'good' to 'outstanding' rating, then that is something of which everyone at the Trust can be extremely proud.



2,807  
people supported  
by the Trust





81.7%

Highest Hospitality Assured score in the UK healthcare sector

## SERVICE

### Hospitality Assured

To help meet the expectations of our residents and customers it's important to look at the organisation through their eyes. The Trust's annual Hospitality Assured assessment is one of the many ways that we do this.

In 2015 the Trust retained its Hospitality Assured Premier status for the eighth consecutive year with its highest-ever score of 81.7%. In doing so, the Trust became the highest scorer in the UK's healthcare sector.

Hospitality Assured is the quality standard that is endorsed by the Institute of Hospitality and is an integral part of the Trust's continuous programme of improvement. The vigorous assessment took place over two days and involved a review of our facilities, marketing and human resource functions.

In their report, the Hospitality Assured assessors, said: "St Monica Trust truly exhibits world class excellence throughout its facilities operation. The quality of the leadership remains exceptional and is the key factor behind the drive to achieve even higher levels of excellence."





# PEOPLE

## Virtuous circles

We like to think of life at the Trust as a virtuous circle, where a beneficial cycle of events is created with each event having a positive effect on the next.

Take Jen, Ian, Maisie and the residents at the Russets, for example.

Maisie belongs to Jen whose husband, Ian is living with dementia. Jen, Ian and Maisie all attend the Musical Memories sessions which are held at The Russets every couple of weeks.

Jen is one of the Trust's growing band of volunteers and she gets a real sense of fulfilment from helping our residents. Ian enjoys himself too. Music has always played a big part in his life and he gets to sing along to *Knees up Mother Brown*.

Maisie is a 'pat dog'. That means she gets lots of attention from the residents (and the occasional cake). This makes both Maisie and the residents feel really good.

Everyone goes home happy.



20,000

hours of visits  
provided by 174 of  
the Trust's volunteers



# PEOPLE

## Growing our own

At the St Monica Trust we're a firm believer in 'growing our own'. Tom Withey joined the Trust as a pot washer and is now Head Chef at Sandford Station.

Like Tom, many of our chefs have trained through the Trust's well-established apprenticeship scheme. It helps ensure consistent and excellent culinary standards across the organisation. Learning to do things 'the St Monica Trust way', so to speak.

As part of their training, our apprentice chefs work together to create an exquisite fine dining menu for our residents. This is a great experience for our apprentices and gives them the opportunity to prepare dishes you'd normally expect to find in a Michelin Star restaurant.

Shots of Gazpacho, Pork, Orange and Bay Ravioli with a Balsamic Olive sauce and a homemade Limoncello served with frozen grapes.

Needless to say, our residents rather enjoyed it too.



2,002

applications received  
for employment  
with the Trust





# PEOPLE

## Zoo Fun Day

We think it's important to say 'thank you' to our colleagues. So last September we hired out the whole of Bristol Zoo for the evening to do just that.

This was the Trust's first-ever Family Fun Day and, as the name implies, colleagues were encouraged to bring along their families and have, well... fun.

With a merry-go-round, inflatable slide, bouncy castle, BBQ, beer tent, live music and all of the facilities at Bristol Zoo at their fingertips – having fun wasn't difficult.

The difficult bit was getting everyone to leave when it was time to go home!

452

staff and members  
of their family  
attended the Bristol  
Zoo Fun Day





# PEOPLE

## A vital contribution

As an organisation, we didn't think it was right that our lowest-paid colleagues might have to work two or even three jobs in order to support themselves and their families.

By committing to paying 5% above the National Living Wage, regardless of age, we wanted to focus on how we lift the lowest-paid colleagues at the Trust above the two-job threshold – helping them achieve a better work/life balance.

Our hope is that extending the National Living Wage to include the under 25s will also encourage younger people to look at social care as a potential career when they leave school.

We need to challenge stereotypes that the care sector pays less to its workers than someone working in a fast food restaurant. It's important to demonstrate to younger people that they can have a successful and fulfilling career in social care and give them the opportunity to do so.

But most importantly, we see setting our lowest rate of pay at 5% above the National Living Wage as a way of acknowledging the vital contribution our staff make to the lives of our residents and our customers every single day of the year.



162

staff will benefit from the 5% above the National Living Wage increase

# PEOPLE

## MUD, glorious MUD!

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Whether it's news, information or food – everything seems to come in bite-size chunks these days.

However, our award-winning training and development team took the opposite approach when it came to keeping colleagues up-to-date with their mandatory training.

Every year there are a number of mandatory topics on which staff need to be kept updated. Important things like fire awareness, first aid, health and safety or moving and handling. Things which help our staff work more safely and maintain the high standards of care that we provide our residents and customers.

Previously, this was done by staff attending up to eight separate sessions, held on different days at the Trust's head office training room. Not great if you've just worked a night shift at The Russets or have to arrange childcare every time you attend.

Our colleagues told us as much during a training needs analysis survey and, as a direct result of that feedback, Mandatory Update Days (MUD) were born. All mandatory training is now delivered in a single day and, most importantly, the training is now taken to staff wherever they work.

Feedback has been extremely positive, with colleagues saying they love the fact that they can come in and receive all their mandatory training in a single day. They also get to meet people on other teams who they wouldn't normally work with, share ideas and learn from one another. It's also fun. And there's sweets. Lots of sweets.

To date, 734 colleagues have enjoyed the benefits of MUD. Which equates to 1,235 Jelly Babies, 498 packets of Haribo and 217 Chupa Chups.



734

members of staff  
attended MUD training

# BUSINESS

## Smarter spending

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'Efficiencies'. Sounds scary, doesn't it? But 'efficiencies' doesn't just mean cutting costs and cutting back. It's more about spending what we have more wisely.

The St Monica Trust is uniquely funded through a combination of fee-paying income and our endowment, which to this day is still managed by the Society of Merchant Venturers. This puts us in a privileged position when compared to other organisations in the UK care sector.

However, with that privilege comes a responsibility and it is important that we justify how and on what we spend the Trust's endowment. It's vital to get the best value for what we do spend and if there's evidence of waste, or things we do less efficiently, then that needs to be challenged. Do our procurement processes truly push for the very best prices? Can we increase our purchasing power by joining forces with other organisations in the care sector? That's where 'efficiencies' come in.

A recent decision to purchase our energy early via the Trust's broker resulted in a significant saving. Because we're a not-for-profit organisation, we don't have to answer to shareholders. That means we can devote ourselves to our communities and our residents. Or local groups like Guys & Dolls.

Set-up by local residents in 2009, Guys & Dolls is a weekly group which runs activities for older people in Cadbury Heath and the surrounding area.

When their funding ran out at the beginning of 2014, the group faced the prospect of closing its doors forever. The Trust's Community Fund, which awards gifts and grants to individuals and organisations, saw an advertisement in the local paper appealing for support and were more than happy to provide the group with funding.

Guys & Dolls was just one of 19 organisations that the St Monica Trust's Community Fund assisted last year, awarding a total of £128,887 in gifts and grants. Next year, thanks to 'efficiencies', the Community Fund will have even more to spend on worthy causes and helping older people living in disadvantaged communities.





£482,237

spent by the  
Community Fund  
in supporting  
individuals and  
organisations



# BUSINESS

## The Chocolate Quarter

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In June 2015 the St Monica Trust secured the former Cadbury's factory in Keynsham for development.

Featuring 136 assisted living apartments and a 90-bed care home offering a range of specialist care, The Chocolate Quarter will become the Trust's fifth retirement community when it opens in Summer 2017.

The development represents a £60 million investment by the Trust and will include a pharmacy and GP surgery, with additional office space and retail outlets.

The Chocolate Quarter is the Trust's first foray into the Bath and North East Somerset area and represents a new approach to retirement living.

Sitting at the heart of the wider Somerdale development, The Chocolate Quarter will be an open and vibrant community, where high quality facilities, such as restaurants, cinemas and health spas will be available to both residents and people from the wider area.

As needs change, any care that is required will be brought to residents on an individual basis. Adaptations to people's living environments will be individually tailored at the time they need it and will be delivered in as unobtrusive manner as possible.

Overall, The Chocolate Quarter, together with the employment space, will lead to the creation of 1,000 jobs within the local community.





98%

occupancy levels  
at the Trust's  
retirement  
accommodation





# BUSINESS

## In partnership

In April 2016 Lloyds Bank and St Monica Trust entered into a £45m financing package to support the Trust's newest development, The Chocolate Quarter.

The Trust's executive team has worked closely with Lloyds Bank over a number of months and we're delighted to be partnering with them on what will be our fifth retirement community.

Lloyds Bank Relationship Director Tom Lloyd-Jones, said: "Understanding the scale of St Monica's ambition for the project and the first class team that has been put in place to deliver the development, made this a compelling development for us to support.

"The Chocolate Quarter is an innovative and transformative project for Keynsham and the local area, and it has been fantastic to see the speed of progress to date. We look forward to continuing to work closely with the whole St Monica team on the project".



1,000

jobs created by The  
Chocolate Quarter  
within the local  
community



# GROWTH

## How can we help?

“People think that most activities for older people involve sitting down, but I’m not like that. Being a former construction engineer, I’m used to doing things. I thought we could do something that gets people up off their backsides.”

As you might have gathered, Colin Hopwood isn’t a man who likes to stay still. A shooting enthusiast, Colin first learned to shoot when he was seven years old at the Royal Arsenal in Woolwich where his father worked as a chief designer with the Inspectorate of Armaments.

When Colin came to us with the idea of introducing indoor archery to Sandford Station, many organisations would have said no due to health and safety reasons. Instead we said “How can we help?”

From an initial have-a-go session, Colin’s archery sessions are now held every Friday afternoon in the Darlisette House atrium and are a regular fixture in the social calendar of Sandford’s residents.

A recent taster session at Sandford Station was attended by residents from Cote Lane and Monica Wills House. Such was the success of the event, indoor archery is now being rolled out across all of the Trust’s retirement communities.

It’s only by listening to our residents that we can help meet their expectations.

Like Colin’s archery session, many of the activities at our retirement communities are resident-led. These include Dr Jennifer Bute’s Japanese Memory Group, bar evenings and fortnightly film nights, which were a direct result of residents telling us what they wanted.



27

Golds hit by Monica Wills and Cote Lane residents at recent taster session



## GROWTH

### Like-minded people

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The Trust is proud to be working in partnership with a number of organisations which share our vision and values. The charity plays a key role on the board of two major governing bodies, the National Care Forum (NCF) and the Association for Retirement Community Operators (ARCO).

As a member of the NCF, members of the Trust's executive team regularly meet with other not-for-profit operators in the care sector to share ideas around best practice and have representatives on the Quality Assurance, Marketing, HR and Finance boards.

ARCO includes members from private sector organisations as well as not-for-profit organisations and charities. This year the Trust was involved in the development of an ARCO code, which included conducting a pilot inspection and implementing the actions identified to meet the code.

We're a passionate advocate of the issues that affect the lives of older people. That's why, over the next five years, we want to position the Trust as a local and national influencer of the provision of services for older people.

Bristol Dementia Alliance  
NACC Hospitality Assured  
Bristol well-being service  
Dementia Navigators  
ARCO Soil Association  
Bristol Dementia Partnership  
European Union Initiative  
City of Bristol College IAHSA  
Customer Service Excellence  
Alzheimer's Café British Quality Foundation





99%

occupancy at the  
Trust's nursing  
care homes

## GROWTH

### Larval Therapy

In an innovative partnership with Bristol Community Health (BCH) and Bristol Clinical Commissioning Group (BCCG), the St Monica Trust recently became one of the first care providers in the UK to introduce larvae therapy to its short-term care service.

Nursing staff at the Trust's John Wills House care home have been working together with BCH and BCCG Tissue Viability Service to support individuals in the community who have developed pressure ulcers, due to other health issues. Referrals were made to the Beeches short-term care unit by the Tissue Viability Service after conventional dressings had been tried and little progress made.

The laboratory bred larvae used in the therapy, which were delivered by post via a specialist bio-surgery company. Contained in an easy-to-use net dressing, the larvae remove the necrotic tissue in wounds which prevent it from healing, while leaving the healthy tissue untouched. This leaves behind a much healthier wound bed that promotes healing much more quickly than conventional methods.

After undergoing specialist training, the Trust's nursing team have now developed their skills to a point where they can manage the application of the larvae therapy themselves, under the supervision of the Tissue Viability Service.

Following a successful trial, in which seven out of eight patients' wounds went on to heal completely (or were left with a small wound that could be managed in the community), funding has now been secured for a permanent tissue viability bed to be contracted in the Beeches.





# FINANCIAL STATEMENTS

In 2015, the Trust spent £27.3m on its charitable activities (an increase of 6% on the previous year), whilst total income was also £27.3m (9% higher than in 2014), resulting in the Trust generating a small operating surplus of £26k for the year, which was added to the Trust's financial reserves.

The Trust is reliant on the income generated from its investments to support its charitable operations. In 2015 the net investment income increased by 13% to £5.6m, which was above target and enabled the Trust to expand and develop its services whilst maintaining a strong, secure financial position.

In 2015 the Trust provided financial support in the form of subsidies, gifts or grants to 1,591 people so they could benefit from the Trust's services. This represented 57% of the total number of people who used the Trust's services in 2015 (2014: 57%).

The Trust's residential care services (care homes and retirement living) helped 1,505 individuals in 2015, of which 36%, or 536 people, were afforded financial support by the Trust. In addition, the Community Fund helped 448 individuals in financial need plus an estimated 600 people through the activities of the LinkAge service.

£'000s	2015	%
<b>Operating Income and Expenditure</b>		
<b>INCOME</b>		
Investment income after costs of generating funds	5,574	20.4
Income from residents of our care homes and sheltered housing	18,365	67.3
Income from services provided to residents	2,221	8.1
Income from the Care at Home service	946	3.5
Other income (training, rent, services, miscellaneous)	184	0.7
<b>Total Income</b>	<b>27,290</b>	<b>100%</b>
<b>EXPENDITURE</b>		
Staff and purchases for the residential and support services	25,517	93.6
Community Fund expenditure	551	2.0
Depreciation of assets	1,148	4.2
Governance of the charity	48	0.2
<b>Total Expenditure</b>	<b>27,264</b>	<b>100%</b>
<b>Surplus/(Deficit) of Income over Expenditure</b>	<b>26</b>	<b>-</b>









# St Monica Trust

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T. 0117 949 4000

[info@stmonicastrust.org.uk](mailto:info@stmonicastrust.org.uk)

[www.stmonicastrust.org.uk](http://www.stmonicastrust.org.uk)

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