



St Monica Trust

Drawing inspiration
from our people

Annual Review
2016/17



St Monica Trust

FOREWORD

by the President

2016 was my first full year as President of the St Monica Trust. This has been a year of unprecedented change for the Trust and, although some aspects were challenging, I found it highly enjoyable.

The creation of the Strategic Plan recognised the importance of our residents, customers, colleagues and volunteers in shaping the future of our retirement communities and the Trust is already seeing the benefits of this.

Our newest retirement community, The Chocolate Quarter has become the Trust's fastest ever selling development and one of our care homes has just achieved an outstanding rating against one of the questions asked during its Care Quality Commission inspection.

For the wider community, we continue to expand our program which offers opportunities for older

“*We were honoured to be recognised by Skills for Care as the Best Employer of over 250 staff.*”

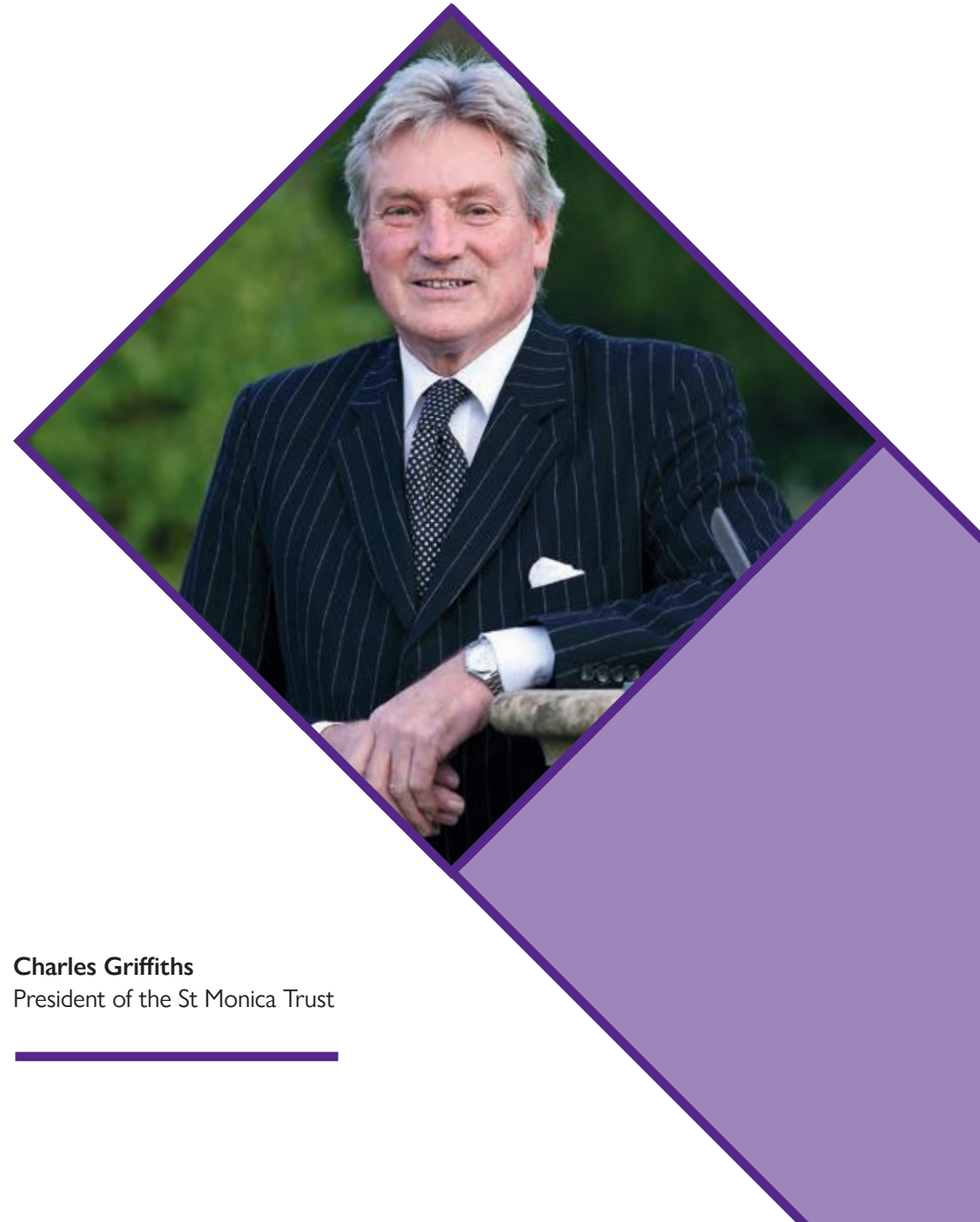
people across Bristol and North Somerset to participate in a variety of activities. Meanwhile our partnership with the REACT programme will hopefully reap benefits for older people across the UK.

Improvements to our procurement processes coupled with good controls of expenditure, especially on water and energy usage, have already resulted in savings of over £250,000 in 2016. At the same time, the Trust has committed to substantially increasing the amount it awards via the Community Fund to disadvantaged older people; this will rise to £1.2 million over the next 3 years.

Any organisation is only as strong as the people who work there and we were honoured to be recognised by Skills for Care as the Best Employer of over 250 staff. It is important that we continue to recruit and retain the best staff. Initiatives, such as our commitment to setting our lowest rate of pay at 5% above the National Living Wage regardless of age, are helping us to achieve this.

Finally, just as our residents, customers, colleagues and volunteers inspired us to shape the future of the organisation, we similarly drew inspiration from exactly the same people when it came to refreshing the Trust's values.

Never has it been more true that:
“We are St Monica Trust.”



Charles Griffiths
President of the St Monica Trust

DRAWING INSPIRATION FROM OUR PEOPLE

As we enter year two of our five year Strategic Plan, it is particularly pleasing to see that we have already achieved a significant number of the strategic aims set out in our 2017 summary.

However, the pages of this year's Annual Review are about so much more than simply ticking boxes. What they reflect are the ways in which our residents and customers are inspiring us as an organisation to create communities and services that reflect their individuality.

In 2016, our residents and customers let us know that they felt our villages were becoming less vibrant and they didn't want gated communities where older people only mix with other older people. What they wanted was to live in open communities with access to people from different generations who will keep them feeling active and alive.

This is why The Chocolate Quarter is an open community, with communal facilities built around the people living there and people from the wider area. What we've created is an environment that allows people to enjoy their lives. As a result of this, The Chocolate Quarter has been our fastest ever selling retirement community with more than 50% of apartments sold off-plan in the first six months of the show home opening.

In our existing communities, we are widening the opportunities for residents to participate in a variety of activities and engage with people from their local area. Events like the recent Mayfest are helping to bring together people from different generations and our Community Development Team has helped spread the sport of Walking Rugby across Bristol.

In order for the Trust to continue to provide services in the future, it is equally important to inspire young people and show that health and social care is a fulfilling career for them to pursue. Our partnership with Weston College and the Trust's apprenticeship scheme, which has landed Meggie her dream job, have been vital in achieving this.

For an organisation like the St Monica Trust, it is crucial that we continue to view our residents and customers as individuals with different interests and expectations. Just like Mary and Marina on *Gogglebox*, we want to celebrate the fact that older people are living longer and acknowledge the vital contribution they make to all our lives.

Long may they continue to inspire us and challenge our perceptions of what older people really want.



David Williams
Chief Executive
of the St Monica Trust



“What they wanted was to live in open communities with access to people from different generations who will keep them feeling active and alive.”

GOGGLEBOX

It appears we're not alone in celebrating the lives of older people. Thanks to a couple of our residents, more than three million television viewers have been doing exactly that every Friday night.

St Monica Trust residents, Mary and Marina, have been a popular addition to the cast of Gogglebox since they joined the hit Channel 4 TV show in 2016.

Discussing everything from Victoria Beckham drinking Liebfraumilch, to Brad Pitt's beard and Butlers in the Buff, the two best friends quickly became firm favourites with the show's legion of fans.

Mary and Marina were discovered by chance after being approached last summer by a researcher from the show outside the retirement community where they live.

Marina said: "It's lots of peoples' favourite programme and they're really pleased for us being on the show. It's brightened up two old dears' lives, hasn't it?"

Added Mary: "We're just talking to each other and having a laugh, aren't we? We do say some cheeky things, but they don't always put them on the show."

Despite having no previous television experience, they quickly became used to the demands of appearing on a show watched by millions of people and are still as down-to-earth as ever.

However, these days they're just as likely to be posing for a selfie with a window cleaner or being interviewed by the TV Times, as taking part in a quiz night.



OUR MISSION

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

DRAWING INSPIRATION

When it came to refreshing our values, we literally drew inspiration from those who represent everything that makes the Trust such a unique organisation.

During the development of our refreshed set of values, we listened to our residents, customers, staff and volunteers to find out what the Trust means to them. This resulted in hundreds of individual comments, emails, postcards, phone calls and fifteen residents meetings across all our sites.

And having drawn inspiration from our residents, customers, staff and volunteers - we drew them. A series of drawing events were held across the Trust throughout the spring and local illustrator, Carys Tait was on hand to sketch mini-portraits of those who had inspired our refreshed values.

The Trust's Colleague Engagement Manager, Naomi Stone, who organised the events, said: "Our values are at the heart of the St Monica Trust and they help us all to shape our everyday actions and behaviours. The idea behind the drawing events was to create a gallery of drawings of our staff, customers, residents and volunteers, which demonstrate that 'We are St Monica Trust.'"

The Trust's refreshed values were launched at our annual ROSE Awards dinner with special categories created to represent each value - complete with some life-size cut-outs of Carys' drawings. Her illustrations were also on display around the Trust throughout June's Founders' Week celebrations and will be appearing in the Trust's literature over the next twelve months.

#WeAreSMT



SERVICE

Working in their home

It was during the recent redecoration of John Wills House that it first appeared on the wall. Not a mural by Bristol-based street artist, Banksy, but a motto that sums up the nursing home's philosophy:

“Our residents do not live in our workplace, we work in their home.”

It certainly caught the attention of the Care Quality Commission inspectors during a recent unannounced visit, which rated the leadership at John Wills House as ‘Outstanding.’

John Wills House Care Home Manager, Wendy Leaman, said: “This is the ethos of the service and why we displayed it at the entrance for everyone entering the building to see.

The Care Quality Commission stated that the service could evidence outstanding practice and residents felt well cared for. Their relatives spoke positively about being involved in care planning, and the staff were responsive to people's needs.

St Monica Trust's Head of Care Homes, Debbie Harris-Brandi, commented: “For John Wills House to achieve an outstanding rating, especially for its leadership, demonstrates the Trust's commitment to the delivery of high quality and individualised care.

“One outstanding rating is a pleasing step on the organisation's journey to achieving an overall outstanding inspection report for our care services.”



STRATEGIC AIM:

We will achieve an Outstanding rating in at least one of the questions asked during a Care Quality Commission inspection of our care homes.

SERVICE

Mayfest

As well as places where everyone always says 'hello' when they pass each other, village communities are often defined by a strong sense of belonging and openness.

Similarly, our residents have let us know that they want their retirement villages to be open and inviting places, with communal facilities and activities that bring together people from different generations.

Events like the Mayfest festival at our Sandford Station retirement community are a great way of achieving this. Held on May Day Bank Holiday, the intergenerational festival saw more than 450 people attend from the local area, plus St Monica Trust residents, volunteers, staff their families and friends.

Samba drumming, May Pole Dancing and a carnival procession were just some of the activities on display during the event. It was also a wonderful opportunity to showcase our residents' many talents, as well as enjoy performances from the Bristol Old Vic Professional Young Artists, the Bristol Pre-Conservatoire and the Original Spinners.

Mayfest was organised by community arts organisation, Wyldwood Arts. Creative Producer, Rachel Adams said: "There were over 100 performers and facilitators from various art forms and we were delighted to be able to celebrate all the wonderful relationships developing between the different ages.

"So many people said that they enjoyed the day and everywhere you looked people seemed to be smiling and enjoying themselves - so we think it was a definitely a success!"



STRATEGIC AIM:

We will host an Intergenerational Festival at Sandford Station retirement community.



PEOPLE

An employer of choice

If you want to recruit and retain the best staff, it makes sense that an organisation should aim to become the best employer in its sector.

However, saying it is one thing, achieving it is another. That's why it's particularly nice if someone else recognises that achievement for you. Someone like Skills for Care.

In 2017, the Trust won the Best Employer of over 250 Staff Award at the Skills for Care Accolades Awards, which celebrate the achievements of the best employers in adult social care.

Because we know how vital our colleagues are to the Trust, our HR team are continually looking at ways to strengthen our employment offering. Whilst this means ensuring that the benefits we offer are as good as they can be, it's also about promoting a positive workplace where colleagues feel supported, happy and valued.

Funnily enough, that's exactly how Care Home Manager, Jackie Green (second left) and Training and Development Partner, Becky Griffin (far right) felt as they accepted the award on behalf of the Trust from Coronation Street's, Samia Ghadie.

STRATEGIC AIM:

We will benchmark the St Monica Trust's staff offer against our competitor employers.





PEOPLE

Meggie's dream job

Meggie was on the Bristol Supported Internship called Into Catering. She really enjoyed her internship and especially loved her last rotation based at the St Monica Trust.

She worked in the Oatley House kitchen with the Head Chef, Gareth, who was her work place mentor.

Meggie fitted in well, helping to prepare vegetables, serving food and learning new skills. The team were very supportive and made her feel at home.

At the end of the internship, Meggie felt she wasn't quite ready for employment. But she didn't want to leave the Trust. The team said that Meggie could stay and she started volunteering one day a week.

During her time volunteering, she has worked both in the kitchen and in front of house. Meggie and her dad hoped that one day she might get a job at the Trust.

Their wish came true a few weeks ago, when Meggie heard that the St Monica Trust had offered her a job.

Both Meggie and her dad are so pleased that she now has her dream job.

STRATEGIC AIM:

We will launch an apprenticeship programme and build on the Trust's existing work experience placements linking with local schools.

PEOPLE

'Thank You'

Two little words that mean so much.

We all know it's an important thing to say, but do we say it enough? Of course the correct answer is 'no': because you can never say it enough.

So in the last twelve months, we've said 'thank you' to our staff and volunteers with popcorn, sweets, Easter eggs, cards, an awards ceremony, a Family Fun Day and a special event organised for the Trust's Care at Home team.

Because recognising a job well done or acknowledging a colleague who has lent a helping hand, makes them feel good. Which is why we'll never stop saying it.

Plus any excuse to see members of our executive team wearing bunny ears is too good to miss.



3,068
PEOPLE
SUPPORTED
BY THE
TRUST

PEOPLE

Sarah and Chloe

You often hear colleagues and residents referring to the Trust as being like a family. And like any family, it's as important to enjoy the good times as it is to stick together during difficult times.

Take Sarah and Chloe, for example. Sarah started working for the Trust as a care assistant when she was just 18 years old. After starting her diploma in adult nursing in 2009, she took a break from her studies when she found out she was pregnant with Chloe.

But, unwilling to abandon her dream of becoming a nurse, Sarah completed an access to nursing course at City of Bristol College and started her degree in adult nursing at UWE in 2013.

Three years at university required Sarah to study full-time and work weekends on bank, while her mum looked after Chloe. Sarah's colleagues also helped out with babysitting and Chloe was always a popular visitor among the residents at The Beeches.

Sarah's graduation was a day of celebration for everyone. Chloe had the day off school and watched with her nannie. She enjoyed it so much that she now wants her own cap so she can throw it in the air.

After graduating, there was only ever one place that Sarah was going to take her nurse preceptorship, which she completed in less than four months.

And because everyone likes a happy ending, Sarah treated Chloe to a surprise visit to Disneyland Paris with her first pay-packet as a qualified nurse.



STRATEGIC AIM:

We will develop greater flexibility in our rostering to better support a work-life balance.



STRATEGIC AIM:

We will work closely with schools and colleges to identify future talent.

PEOPLE Weston College

As well as attracting new residents to our retirement communities, it's equally important we continue to recruit new staff.

This is why our partnerships with schools and colleges are vital in promoting health and social care as a really fulfilling career for young people to pursue.

Take our relationship with Weston College, for example. At a recent charity dinner year two catering students got to cook alongside some of the very best chefs in Bristol.

The students planned, prepared and served a six-course gourmet meal for 90 diners – helping raise more than £5,000 for the Nicola Corry Support Foundation in the process.

The St Monica Trust's Catering Development Manager, Adrian Kirikmaa, said: "Food is such a big part of what we do at the Trust and we want to recruit people with a real passion for food onto our catering teams."

Over the last twelve months, Adrian has been visiting schools and colleges across Bristol and North Somerset to raise the profile of the Trust's catering services.

"Our relationship with Weston College is very much a two-way street," he said. "They are recognised as the top-performing college in the South West and their educational expertise will be vital in helping us create a chefs school in Bristol!"



STRATEGIC AIM:
We will explore new
models of service
delivery.

GROWTH

A home from home

The Chocolate Quarter is the Trust's first truly open community, with communal facilities built around the people living there and people from Keynsham and the wider area.

And to ensure every resident and visitor receives the very warmest of welcomes, The Trust has appointed our first ever General Manager, Roger Hayward.

As Roger explained: "We'll be installing a concierge service so there's a permanent, welcoming service at the front entrance of the building. Anyone coming in will notice the difference as soon as they walk through the door.

"There will be a more commercial feel to The Chocolate Quarter rather than a traditional care environment. It's hoped that this will change people's perceptions of where they are and what they expect from a retirement community."

From washing up in a pub kitchen to managing events at a 5 star country house hotel, Roger has spent many years in the hospitality sector. "Hospitality is seen as a magic equation, but it's more a case of finding the right people and sharing a vision of what you want to deliver.

"I want to create a home-from-home feeling for new residents when they move in. Moving is always a daunting time for anyone and I'm keen to help every individual settle in as quickly as possible.

"It's important to make myself and the team known to everyone from day one, so they feel that they are part of this exciting and vibrant community."

GROWTH

Walking rugby

A partnership between the Trust's Community Development Team and Bristol Rugby Community Foundation has introduced over 55s Walking Rugby to the city.

Just one year on and with more than 40 registered players, Walking Rugby in Bristol has gone from strength to strength, culminating in playing an exhibition match at the Aviva Premiership Final at Twickenham.

"It is crazy to think that only a year ago we were throwing the ball around for the first time on a taster day, and now we've played an exhibition match at the Premiership final," said Programme Manager, Kris Tavender.

Walking Rugby is aimed at over 55s who are looking for meaningful and aspirational physical and social activity across the week. But beneath this lies a much more tender and sensitive need, where older members of society are challenged by social isolation, loneliness and a loss of physical mobility.

"We are delighted to be working with Bristol Rugby to deliver Walking Rugby sessions," said the Trust's Community Development Manager, Debbie Wills. "The first six months of this programme has proved extremely popular and it is a pleasure to see so many people – men and women – enjoying the game. It's a great way to stay active and make new friends."

The origins of Walking Rugby lie in Stockwood where Community Development Worker, Dan Lewin, identified an interest in the sport from older people living in the area. Dan contacted Bristol Rugby Community Foundation and arranged a taster session, which saw eight players turn out.

The project was developed over several months and regular weekly sessions started in November 2016 with thirteen players attending and coaching provided by Bristol Sport. In three months, this grew to thirty-five players and Bristol Rugby have now attracted funding to set up four more Walking Rugby hubs across Bristol.

The Community Development Team are working to set up one of these hubs at the Somerdale Pavilion opposite The Chocolate Quarter and Walking Rugby is also going to be trialled at the Trust's Westbury Fields retirement community.





STRATEGIC AIM:

We will expand the number of areas where we have established partnerships with grassroots organisations to support older people in those communities.



GROWTH

Working in partnership

We want to build partnerships that will improve the lives of disadvantaged older people.

Take the Older People's Sustainability Grant, for example. By working in partnership with the Quartet Community Foundation, the Trust's Community Fund was able to double the funding from £20,000 to £40,000.

This means that the Older People's Sustainability Grant can now support twice as many local groups that benefit older people. Groups like the Curzon's outreach film experience that are putting on a series of films in residential and care homes across North Somerset.

The grant of over £5,000 has allowed the cinema to invest in a short throw projector and pop-up screen, with a sound system and hearing loop.

Volunteers, dressed in the traditional Curzon livery, set up the large screen and serve popcorn to give a real cinema experience for people who aren't able to get out and about.

You could argue that £5,000 isn't exactly *The Treasure of Sierra Madre*, but the Older People's Sustainability Grant is all about helping groups like Curzon to become sustainable and thus ensure their long-term future.

Hopefully, this will prevent them being *Gone with the Wind* after a few months and will keep the older people of North Somerset in agreement that *It's a Wonderful Life*.



STRATEGIC AIM:

We will form an alliance of Bristol grant giving charities to maximise the impact of our funding in improving the lives of older people.



GROWTH REACT

“Tea”, “biscuit”, “sugar”, “sweet”, “sour”, “lemon”, “lime”, “drink”, “gin”. Margaret’s response to the word association game gets a laugh from her fellow members of the REACT class.

After an hour’s vigorous exercise, trainer, Lee Scott agrees that they all deserve a drink – although the choice is only tea or coffee.

REACT (Retirement in Action) is an intervention programme run by the University of Bath and the NHS National Institute for Health Research. The concept behind the programme is that an older person who remains fit and active is more likely to enjoy independence, mental well-being and a higher quality of life.

When REACT were looking for a partner to provide the facilities where the research could take place, the Trust were more than happy to take part.

The project runs over two years and during the first year, participants take part in two one-hour exercise sessions per week, which is reduced to once per week after three months. In the second year all support is withdrawn, but it is hoped that the participants will look for opportunities to exercise in their own area, by joining walking groups for example.

After a successful pilot study, REACT is now being run at both our Cote Lane and Monica Wills House retirement communities. Whether the project is adopted nationally or not, it’s already having a really positive impact on people’s lives.

Just ask Margaret, Nancy, Maralyn, Grace, Sheila, Brian, Elizabeth, Francis and Jack.



STRATEGIC AIM:

We will undertake an externally funded research project focusing on maintaining physical well-being and the utilisation of technology in the delivery of care.



BUSINESS

Enhancement programme

Not to cast aspersions on Jill's washing-up abilities, but her mum's egg rack has just had its first proper clean for 50 years.

Both Jill Cownie and her mum's egg rack are the beneficiaries of the Trust's £6.8 million Village Enhancement Programme, which recently saw her gain possession of a dishwasher, as well as a brand new kitchen and bathroom.

"The kitchen is wonderful, but the most exciting thing was having a dishwasher again," said Jill. "There's things you can put in a dishwasher that you can't get clean in a sink. Like my mother's egg rack."

Following last year's consultation programme, the Trust identified a need to upgrade and refresh some of our older sites. This was to ensure that they continue to meet our customers' expectations and our current residents receive a similar standard of appliances as offered at our newest site, The Chocolate Quarter.

Jill's home was just one of the Westbury Fields properties which were prioritised for some TLC following discussions with our residents and customers. With the site now 13 years old, the kitchens and bathrooms of assisted living properties at Westbury Fields were identified and prioritised as in need of replacing.

"To find that St Monica Trust is giving us all these wonderful gadgets is unbelievable and such a good idea," continued Jill. "I'm so lucky: this year I've had a new knee, a new kitchen and had the bathroom done. I have a host of friends and I think I've got the best flat on the site. What more could I want?"



STRATEGIC AIM:
We will begin the specification upgrade of bathrooms and kitchens in existing apartments.





STRATEGIC AIM:

We will utilise a programme to assess our processes across the business to ensure that they are fit for purpose and maximise efficiencies.



BUSINESS

Water detectives



When it comes to saving resources, stopping a dripping tap or a leaking water tank might sound like a drop in the ocean.

But when significant water consumption throughout the night was identified at one of our retirement communities, some investigative work by our facilities team led to a saving of 1,800m³ of water.

And our intrepid night owls weren't finished there. When more significant night time consumption was identified on the main Cote Lane meter, our facilities team discovered an old pipe to be the culprit. The offending pipe was duly replaced with a shiny new one, resulting in a saving of 3,300m³ of water.

Overall, these two pieces of aquatic detective work should reduce the Trust's water consumption by more than 5,000m³ which is roughly 10 per cent of our entire consumption – saving more than £14,000 in the process.

Things like reducing our water consumption and making improvements to our procurement processes have already resulted in savings of over £250,000 in 2016.

At the same time, the Trust has committed to increase the amount it awards via the Community Fund to disadvantaged older people to £1.2 million over the next three years. This will enable groups like the Curzon's outreach film experience to remain sustainable and provide a vital service for older people.

All paid for by replacing an old leaky piece of pipe.

FINANCIAL STATEMENTS

In 2016, the Trust spent £28.3m on its charitable activities (an increase of 4% on the previous year), whilst total income was £28.6m (5% higher than in 2015), resulting in the Trust generating an operating surplus of £317,000 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 2016, the net investment income was £5.7m, which was in line with forecasts and enabled the Trust to expand and develop its services, including building capacity for The Chocolate Quarter whilst maintaining a strong, secure financial position.

The Trust's residential care services (care homes and retirement living) helped 1,553 individuals in 2016, of which 36%, or 565 people, were afforded financial support by the Trust. The Trust's Care at Home service also assisted 304 individuals in their own home. In addition, the Community Fund helped 438 individuals in financial need plus an estimated 773 people (1,212 sessions with 12,134 attendances) through the activities of the LinkAge service.

In 2016, therefore, a total of 1,776 people (58% of 3,068 service users) were supported financially by the Trust (2015: 1,591 people were supported financially representing 57% of 2,807 service users).

£'000s	2016	%
Operating Income and Expenditure		
INCOME		
Investment income after costs of generating funds	5,692	20.0
Income from residents of our care homes and sheltered housing	19,250	67.3
Income from services provided to residents	2,428	8.5
Income from the Care at Home service	1,104	3.8
Other income (training, rent, services, miscellaneous)	113	0.4
Total Income	28,587	100%
EXPENDITURE		
Staff and purchases for the residential and support services	26,431	93.5
Community Fund expenditure	575	2.0
Depreciation of assets	1,219	4.3
Governance of the Charity	45	0.2
Total Expenditure	28,270	100%
Surplus of Income over Expenditure	317	–



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