



St Monica Trust

Strategic Plan
SUMMARY



The St Monica Trust is a very special organisation.

Our success over recent years is built around a passion for approaching things differently. That's why we have become known as an expert in providing award-winning, world-class services and support for older people. What's more, the people who work at the Trust share a deep connection with our values and that's what makes others want to sign up and be part of the team.

What has remained constant throughout our growth and evolution has been a lasting commitment to making sure that our residents and customers have the best possible experience in all that we do. This is the foremost principle upon which we have created our plan for the next five years.

This plan recognises that we need to build on our relationships with residents, customers and their families so that we can work together to shape the future of our retirement villages and other services. This will guarantee that they continue to be attractive, inviting communities in which we remain agile in responding effectively to people's needs. We acknowledge the necessity for the development of an organisational culture that attracts the right people to work here. People who are motivated to go the extra mile. People who remain unwavering in their contribution to the Trust's high quality services and support.

In our determination to do this, however, we must also take care to ensure that we are responsible with our financial resources and that we invest in our estates and infrastructure for the future security of the Trust, its residents, customers, staff and volunteers.

As an organisation which makes such a difference to the lives of older people and within our industry, we have a duty to continue to expand our knowledge and impact, to cultivate our wisdom and advancement. This is why we are committed to a programme of outreach within disadvantaged communities. It is also why we are eager to deliver greater investment in innovation, technology, and research within the field of social housing and care of older generations in the UK and across the globe.

I am delighted to have joined the team and look forward to being part of our future together.

David Williams



Our Values

DIGNITY – being courteous and taking others needs seriously.

RESPECT – recognising everyone as an individual, showing consideration for each other.

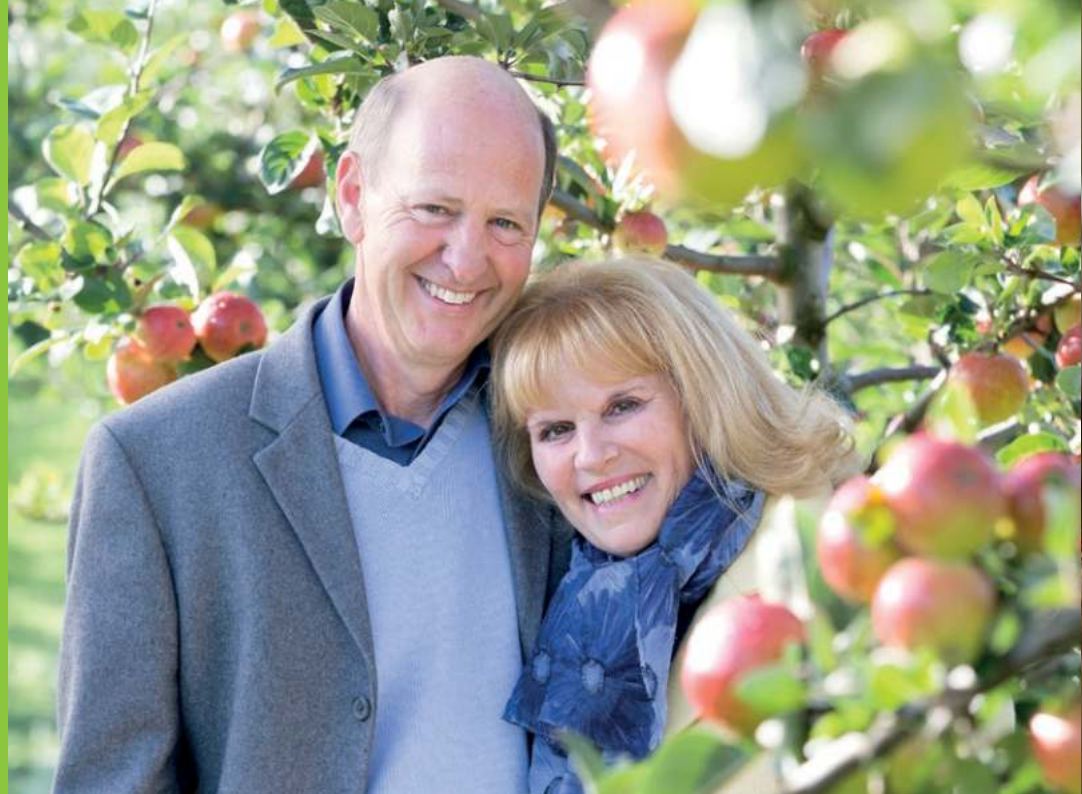
HONESTY – being truthful, trustworthy and open with one-another.

CARE – taking steps to protect and support the well-being of everyone at the Trust.

TRUST – being reliable, dependable and taking responsibility for our own actions.

We are undertaking a review of our values, which will be updated in line with the Trust's five year strategy during 2016.







“At St Monica Trust, we are proud to have become known as an expert in providing high quality care services and support for older people. We are passionate about sustaining positive, customer-focused relationships with residents, customers and each other.”



Our Vision

- Provide world class care, facilities and support for older people and be recognised for excellence in our sector.
- Maintain a culture that recognises and celebrates our history.
- Be responsive to our residents' and customers' needs, allowing innovation to flourish.
- Maintain sustainable, efficient and responsive estates, infrastructure and technology.





Our Mission

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



Strategic Aim 1

1.1 We will attract new residents and customers and retain and deepen our relationship with those we already have. We will:

- Build on our heritage and continue to translate the charity's vision through holistic care and support.
- Continue to respond to the needs of people as they grow older by offering a range of responsive services in partnership with health and social care professionals.
- Promote a sense of security and belonging in the communities where we operate.
- Continue to apply our customer-focused approach to the delivery of high quality, compassionate care.
- Continue to utilise our inspection and accreditation processes to identify areas for continuous improvement within our care and support services.
- Enhance our marketing strategy to identify and publicise the aspects of the Trust that make it unique amongst other providers.
- Identify our core markets and position our brand and offering to provide a targeted, competitive alternative within the wider market.
- Create more flexible financial options for customers to access the services offered by the Trust.
- Actively involve existing residents and customers, staff and volunteers in the design and development of our current and new service offerings.
- Encourage opportunities for residents/customers, staff and volunteers to participate actively in village and inter-village activities.

- Publish an annual report identifying the extent and nature of the St Monica Trust's charitable subsidy to the services we provide.

1.2 We will deal honestly with our residents and customers, understand their perspectives and secure their loyalty and trust by providing outstanding choice, value and service. We will:

- Give time and attention to the views of all our residents and customers and be responsive to their concerns.
- Ensure our services respond to the diverse range of our residents' and customers' needs and experiences at whatever stage they present.
- Develop a transparent schedule of charges across all our services.
- Establish accountability and responsibility of management at a local level.
- Develop the St Monica Trust club membership for residents and customers across the organisation.
- Develop key partnerships with organisations that share our values to provide our residents and customers with products and services that help maximise their income and quality of life.

1.3 We will partner with residents and customers, offering them a real voice in both the services they receive and the future development of the Trust. We will:

- Establish village councils across the Trust to ensure that the needs and interests of residents and customers are represented and directly inform the development of their local communities.

- Value the diverse contributions of our residents and customers and promote a sense of belonging.
- Be honest and realistic with residents and customers about what the charity can achieve, the constraints placed upon it and the context in which we operate.
- Continue to deliver informal resident consultation via the eXplore programme.
- Ensure that we provide open, appropriate and prompt feedback to those whom we consult.
- Involve residents and customers directly within the service development hubs that will be developed over the next five years.
- Review methods of communication with residents and customers in order to ensure that communication meets their needs and that this is two-way.

1.4 We will be actively involved in the building and maintenance of supportive and enriching communities. We will:

- Review our re-sales allocation strategy to ensure that it supports the maintenance of balanced communities within our villages.
- Develop a village enhancement programme to ensure our villages remain attractive to new residents and customers and maintain our position as a leading provider in the market.
- Examine the implementation of dementia-friendly communities.
- Create a programme of inter-site and site-wide activities and interests and support residents and customers to participate.



Strategic Aim 2

2.1 We will ensure that everyone working for the Trust has the right and the opportunity to have their voice heard. This will allow the Trust to make decisions for the benefit of the Trust as a whole. We will:

- Implement formalised communication structures with colleagues within the Trust.
- Develop the eXplore programme to allow colleagues to informally voice concerns and/or ideas.
- Create staff project groups to specifically develop and improve services.
- Ensure that all staff receive regular and effective supervision and support and use this as a vehicle for active development.
- Make use of social media and other channels of communication to increase senior executive accessibility and transparency.

2.2 We will continue to make people's jobs more satisfying through a wide selection of employee benefits, opportunities to increase knowledge and increased staff empowerment in the running of our communities and services. We will:

- Make money go further through the development of a comprehensive staff discount and voucher offering.
- Help colleagues achieve a work-life balance through the provision of benefits that target not just individual staff, but their close families.
- Review organisational policies and practices to ensure that they reflect the organisation's commitment to maintaining colleagues' work-life balance.

- Form strategic partnerships with external organisations that will allow us to improve or further develop our staff offering.
- Introduce and exceed the government's living wage levels up to 2020.
- Annually review colleagues' terms and conditions to ensure that they reflect the values and ethos of the Trust.
- Develop an internal learning and research academy, to ensure that our staff receive the very best training in all aspects of housing, health, social care and support.
- Introduce opportunities for colleagues to progress within their current disciplines and to experience other disciplines within the Trust.
- Invest in our staff to support individuals to become the leaders of the future.
- Devolve decision-making responsibilities to the Trust's villages by January 2017, whilst ensuring that the Trust has the appropriate structures in place to maintain service consistency across sites.
- Identify and develop internal staff talent within the Trust.

2.3 We will make it easy for the right people to join our team and will actively attract and recruit people who share our values. We will:

- Actively market the Trust as a good employer through both local and national media channels.
- Develop targeted staff offers and recruitment strategies for key employee groups.
- Examine the viability of recruiting to key disciplines from overseas.

- Annually review employee salaries and benefits against other key providers within our sector, both locally and nationally.
- Implement value-based, attitudinal interviewing and selection processes.
- Develop partnership arrangements with local schools and colleges to promote health and social care as a career of choice and 'grow our own' talent.
- Promote volunteering opportunities within the Trust to recruit and retain an active community of volunteers who are as integral as our staff to the delivery of services.

2.4 We will retain existing staff through the creation of a working environment where no one person is more important than another in which on-the-job innovation/learning are prized, and the contribution of colleagues is valued/recognised. We will:

- Encourage and value diversity in our workforce where each employee and volunteer's contribution is respected and where they feel included.
- Actively encourage colleagues to innovate and to continually improve service provision across the Trust through the implementation of service development hubs.
- Implement a formal employee shadowing programme to increase knowledge and cross-functional working.
- Ensure that the executive team lead by example so that managers at all levels actively support front line staff in the delivery of services.
- Ensure that the organisation has the processes in place to actively recognise a job well done.
- Review job descriptions so that they reflect current and future service needs.



Strategic Aim 3

3.1 We will continue to ensure sustainable financial planning. We will:

- Produce an annual benchmarking report about our operational and corporate costs against our key competitors in the sector and against high performing organisations outside the sector.
- Implement an appropriate methodology across the organisation that encourages teams to maximise efficiency of processes, minimise waste and deliver cost savings.
- Reduce the corporate overhead from 11% to 9% over the duration of the five year plan.
- Look to identify £200k of efficiencies per annum, as agreed with Trustees.
- Further the diversification of income sources through developing an increased number of contracts with the health sector.
- Review and establish the appropriate balance between local authority, health and private funded residents and customers.
- Increase the number of older people who receive services from Care at Home, year on year, working to agreed targets.

- Improve managers' ownership and implementation of all budget processes including operating plans and budget monitoring arrangements to reduce budget variances.
- Ensure financial controls are embedded across the Trust and are regularly and robustly monitored.
- Establish an agreed set of business key performance indicators to be monitored and delivered by staff across the organisation over the five year period.
- Project the costs to the organisation of implementing the living wage up to and including 2020.
- Benchmark resident/customer fees with competitor organisations year on year to ensure value for money.

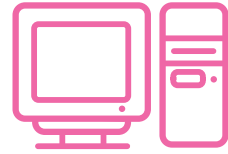
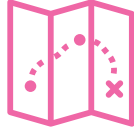
3.2 We will ensure that the financial strategy supports the maintenance of facilities and resources. We will:

- Direct and allocate appropriate resources to support the resident/customer experience and create excellent working environments for staff.
- Develop a positive approach to the management of risks so that the experience of residents, customers and staff are not unduly compromised.
- Review our procurement strategy to ensure that we maximise the use of the Trust's resources and deliver value for our customers within year two.

- Identify and implement a recognised environmental management system across the Trust's facilities.
- Continue the programme of IT infrastructure development and delivery improvements both in terms of the service and corporate requirements of the Trust.

3.3 We will continue to improve our estate and infrastructure. We will:

- Provide a physical environment for our customers and staff that meets or exceeds that of our competitors.
- Ensure that environmental and sustainability initiatives form part of all team objectives.
- Empower staff, residents and customers to make sensible and responsible decisions to reduce waste and environmental impact.
- Ensure that all facilities and infrastructure projects deliver value for money and are fit for purpose.
- Deliver a sustainable and efficient capital programme.
- Review head office accommodation and establish a viable plan to accommodate future requirements.



Strategic Aim 4

4.1 We will develop a five-year proactive sustainable growth strategy for the organisation.

We will:

- Look to expand the Care at Home service to a further two sites over the next five years. This will include the provision of a care shop within the Keynsham development.
- Explore the viability of developing a health offering within the Care at Home service.
- Look to acquire site expansion space within each of our villages.
- Complete construction and occupation of the Keynsham retirement village by summer 2019.
- Examine the viability of a sixth retirement village within year four of the strategic plan.
- Introduce a new directorate of transformation and development within the Trust from January 2016.

4.2 We want to position the organisation as a local and national influencer in terms of the provision of services for older people.

We will:

- Use the learning and research academy to develop an internal programme of research and external research partnerships that establish the Trust as a leader in the provision of older people's services.
- Establish a clear voice for the organisation in the regional and national arena around the older people's agenda in the UK and internationally, targeting policy makers, practitioners and practice development.

- Promote the attendance of our staff as presenters in UK and international conferences.
- Explore the hosting of a regional conference, focusing on evidence-based practice and other issues in the older people's service sector in 2018.
- Ensure that our organisation's views are represented on key local and national decision/policy-making boards.

4.3 We will develop a five-year strategy for increasing the Trust's impact on the well-being of disadvantaged older people living in Bristol and the surrounding areas. We will:

- Seek to develop key partnerships with other grant-giving bodies to maximise the impact of the Community Fund through the joining of resources and its use as a lever to access further national funding.
- Seek to develop an area-wide grant-giving programme targeting the improvement of well-being of older people living in disadvantaged communities.
- Develop key strategic partnerships with grass-root community organisations that share our values to improve the well-being of disadvantaged older people.
- Seek to establish a stronger identity for the Community Fund within the organisation and externally.
- Seek to increase the money distributed by the Community Fund to over £1m within the five-year period.

4.4 We will develop and enhance our use of technology across the organisation to improve the customer and staff experience. We will:

- Produce a costed technology strategy within year one.
- Ensure that colleagues are provided with the opportunity to contribute to the development of technology in the organisation and that they have the necessary skills and support to maximise the use of systems and infrastructure.
- Roll out electronic care rostering across the organisation over a two year period.
- Develop assistive technology strategy to complement our care service provision and increase the value of our services for residents and customers.
- Seek to implement a high level of integration between different data sources across the organisation to improve management information and the performance and efficiency of the charity.
- Create a 'smart'-house within the learning and research academy as a means of testing and researching the effectiveness of new pieces of assistive technology in collaboration with those who will use them in readiness for their implementation into mainstream services.

Strategic Plan

SUMMARY

ONE

Service customers

We want residents and customers to have the best possible experience in all that we do.

TWO

People colleagues and volunteers

We want to develop an organisational culture that attracts, motivates and supports our people to deliver responsive services that meet the needs of our customers and residents now and in the future.

Our Mission
Working together to support and celebrate the lives of older people

Business and resources

Through ensuring financial and organisational sustainability we will deliver certainty and security for our customers and staff.

THREE

We will grow the Trust in order to impact positively on more people's lives through increasing opportunities for innovative services, offering value for money and through staff development.

Growth and development

FOUR



St Monica Trust



your voice,
our future

eExplore is the Trust's very own feedback framework, which exists to listen to your views and make sure that they are heard within the organisation. The programme has already been hugely influential in providing guidance for 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.

Whatever your connections with the Trust, your views are important and can make a real difference. You can tell us what you think about our strategic plan or share your thoughts regarding any matter relating to the Trust that affects you.

The team are available on **0117 919 8736** or you can email them at **haveyoursay@stmonicastrust.org.uk**



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www.stmonicastrust.org.uk