



St Monica Trust

Strategic Plan

SUMMARY 2017

# Welcome to the 2017 summary of the St Monica Trust's five-year strategic plan.

The last twelve months has seen the start of the process to help implement the findings of the largest listening programme in the Trust's 92 year history.

The creation of the strategic plan recognised the importance of our residents, customers, their families and colleagues in shaping the future of our retirement communities and the Trust is already seeing the benefits of this.

The development of The Chocolate Quarter represents a big investment for the Trust and listening to what our potential customers wanted was vital in helping us get what we were offering right. People no longer want to live in gated communities where older people only mix with other older people. Instead they want to live in open communities with access to people from different generations. This is why The Chocolate Quarter will be the Trust's first open gated community with communal facilities built around the people living there and the people from the surrounding area. As a result of this new approach, The Chocolate Quarter has been our fastest selling retirement community with 45% of apartments sold off-plan in the first four months of the show home opening.

Our residents also let us know that they felt that our villages were becoming less vibrant. Equally, they wanted more control of their environments and the services they received and wanted the structures in place to support that. To address these issues we have begun the process of moving the way that decisions are made from a central to local level. A consultation was also carried out into how our properties are allocated as a way of injecting 'new blood' into our retirement communities and a £13 million enhancement programme for our existing sites has been approved.



We are also widening the opportunities for residents to participate in a variety of activities and meet people from other sites. A recent example of this is the indoor archery, which was a resident-led activity at our Sandford Station retirement community. We are delighted that indoor archery has now been rolled out across the Trust's other sites and the first inter-site archery competition took place in January 2017.

Any organisation is only as strong as the people who work there. Paying 5% above the National Living Wage regardless of age, offering a comprehensive training programme and providing opportunities for career development, are just some of the ways the Trust recruited more than 500 new colleagues in 2016.

Improvements to our procurement processes and reducing unnecessary expenditure have already resulted in savings of over £250,000. At the same time the Trust has committed to increase the amount it awards to disadvantaged older people via the Community Fund to £1.2 million over the next three years.

In 2017, we hope to continue to build upon our successes of the last 12 months. Please read on to see the next steps in our five-year journey to make the St Monica Trust an outstanding organisation.

**David Williams**



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## Our Mission

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

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## 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.

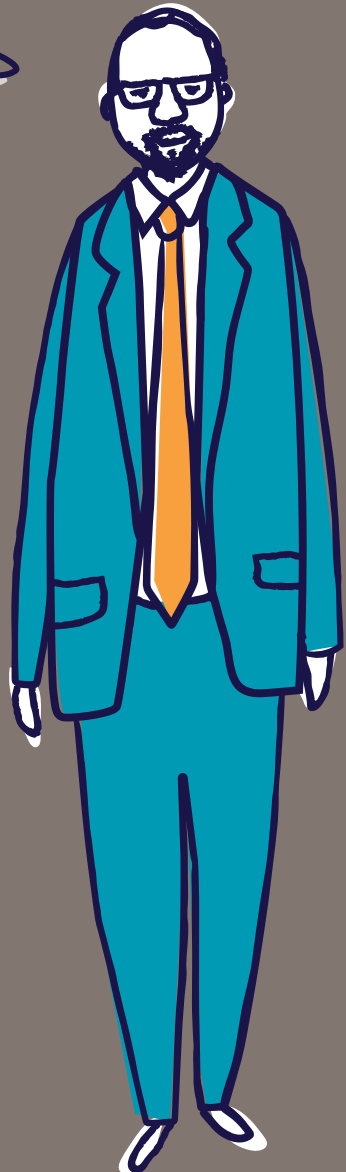






“At the St Monica Trust, we are proud to have become known as experts in providing high quality care services and support for older people. We are passionate about sustaining positive, customer-focused relationships with residents, customers and each other.”

In 2017 you will see our new values being rolled out across the St Monica Trust. These values are inspired by you and they are the heart of the organisation.



## Our Values

We are people people.

We are caring.

We are responsive.

We are honest.

We are inspirational.

We are dedicated.

We are St Monica Trust.

#WeAreSMT





E P L O R E

your voice,  
our future

**eXplore** 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.

If you would like to get in contact with the eXplore team you can email them at [haveyoursay@stmonicastrust.org.uk](mailto:haveyoursay@stmonicastrust.org.uk). Alternatively, if you would rather speak to someone, residents and customers can call **0117 919 8703** and colleagues can call **0117 919 8736**.



St Monica Trust

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





# Strategic Aim 1

## **1.1 We will attract new residents and customers and retain and deepen our relationship with those already living in our communities. We will:**

- Implement a programme of weekly meaningful moments with our care home residents over the next 12 months.
- Achieve an Outstanding rating in at least one Key Line of Enquiry during a Care Quality Commission inspection of our care services.
- Create a strategy and commence the delivery of the St Monica Trust rebranding process, to ensure we meet the expectations of current and potential customers.
- Trial an event fees model at The Chocolate Quarter and evaluate the impact for further development.
- Establish the legal definition of event fees for leaseholders at our established sites.
- Create solutions for customers accessing the inter-site activities programme, including a transport review.
- Expand the opportunities for inter-site participation in activities.
- Develop a system for matching residents' interests and skills with the activities across our sites.

## **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:**

- Move more management decisions from a central to local level in order to create greater accountability and responsiveness to our residents and customers.

- Agree key partnerships with external organisations to maximize value for money for our residents and customers.
- Further develop the eXplore Programme to enable regular reviews of our resident and customer offer.

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

- Define the purpose and scope of the village councils, create and run an election process and initiate their first meetings across all our sites.
- Review our methods of consulting with residents of our care homes to ensure that this communication meets their needs.
- Agree a standard feedback process on all forms of residents' comments.

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

- Publish our resale allocations strategy for our leasehold properties and implement the processes agreed.
- Engage residents and customers in determining the agreed priorities for our Village Enhancement Programme at each site.
- Work with residents and staff to develop our welcome pack and processes for people who move into our retirement communities.
- Host an Intergenerational Festival at Sandford Station retirement community.



## 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 organisation as a whole. We will:**

- Increase our use of social media and other methods to communicate with colleague groups.
- Develop eXplore to ensure that we engage colleagues in their workplace.
- Develop colleague eXplorers to connect with colleagues across the Trust.
- Create a dialogue with colleagues through the eXplorers to review policies and practices that impact on their roles, such as attendance policies, roster arrangements and the colleague reward systems.

**2.2 Continually work towards making the St Monica Trust's colleague offer the best in the market, including benefits, training, recognition and progression opportunities. We will:**

- Agree partnerships with organisations that strengthen our offer to colleagues and the Trust.
- Finalise our business plan to ensure our Learning and Research Academy at The Chocolate Quarter meets its objectives and is financially sustainable.
- Benchmark the St Monica Trust's colleague offer against our competitor employers.
- Continue to develop the Trust's Leadership Programme.

- Benchmark colleague rates of pay against key competitor organisations in both the statutory and private sectors.

- Improve colleague facilities within each of our sites.

**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:**

- Develop greater flexibility in our rostering to better support a work-life balance.
- Establish the local management accountability and leadership through the Site Executive Teams on all our sites.
- Launch our revised values across the Trust.
- Recruit 250 additional colleagues to deliver services to The Chocolate Quarter.
- Launch an apprenticeship programme.
- Build on the Trust's existing work experience placements linking with local schools.
- Work closely with schools and colleges to identify future talent.



## Strategic Aim 3

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

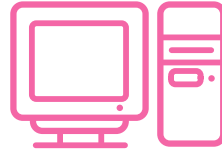
- Utilise a programme to assess our processes across the business to ensure they are fit for purpose and maximise efficiencies.
- Implement a programme of electronic rostering across services.
- Continue to review our energy usage against our contractual competitor's offers.
- Identify a procurement system capable of supporting 'purchase to pay' at all sites.
- Deliver a further £200k efficiency in 2017.
- Use a suite of key performance indicators to monitor the delivery of business objectives.

### **3.2 We will continue to strengthen our IT infrastructure to meet the needs of our customers and the requirements of the Trust. We will:**

- Appoint an additional IT support officer focused on resident engagement.
- Create a management information reporting dashboard to support our key performance indicators collection and reporting.
- Enhance our IT infrastructure (cabling, local servers, WiFi coverage etc.) to deliver a better experience for customers and staff.
- Complete the roll out of electronic rostering across our care services.
- Review our data storage procedures to mitigate against the risk of future cyber attacks.

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

- Implement the enhancements/renewals programme for 2017 according to the timeline and priority.
  - Install an electronic system to open/close the vents at Monica Wills House to reduce temperature fluctuations in the building.
  - Create and improve reception areas within each of our villages.
  - Begin the specification upgrade of bathrooms and kitchens in existing apartments.
- Ensure that our projects minimise environmental impact and report on these achievements.



## Strategic Aim 4

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

- Support the Trustees in the production of the Trust's growth and development strategy.
- Explore new models of service delivery.
- Produce operating models for expansion at the Westbury Fields retirement community.
- Complete construction of The Chocolate Quarter in the second half of 2017.
- Commence operation of The Chocolate Quarter as our fifth retirement village in the autumn of 2017.
- Commence operation of Charterhouse care home at the Chocolate Quarter in the autumn of 2017.

### **4.2 We want to position the organisation as a local and national influencer in the provision of services to older people. We will:**

- Establish the Learning and Research Academy at The Chocolate Quarter in partnership with education and research bodies.
- Appoint a St Monica Trust researcher to support an internal programme of research and evaluation.
- Undertake an externally funded research project focusing on maintaining physical well-being and the utilisation of technology in the delivery of care.

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

- Agree the Community Fund's five-year strategy to support its development and increased funding capacity.
- Form an alliance of Bristol grant giving charities to maximise the impact of our funding in improving the lives of older people.
- Expand the number of areas where we have established partnerships with grassroots organisations to support older people in those communities.

# Strategic Plan

SUMMARY 2017

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

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

## Business and resources

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

THREE

FOUR



St Monica Trust