



CHARITABLE GIVING

JUNE NEWSLETTER 2023



The Charitable Giving Team

We distribute hundreds of thousands of pounds to individuals, organisations and communities across Bristol, North Somerset, South Gloucestershire and Bath & North East Somerset to improve the lives of older people in the region.

Our founders made it clear from the start that the charity was to support older people living in Trust property *and* in the wider community. We continue to be about ensuring that older people have a good quality of life, and we're committed to developing communities where older people flourish, internally and in the wider community.

10-year strategy update

Our 10-year strategy was launched in January following collaboration with our residents, Trustees, colleagues and others and the Trust has been working hard to achieve its objectives for the benefit of all those we serve and support.

Our strategy commits us to putting a greater focus on our charitable activity to make sure we optimise the impact of our charitable foundation. This work is at an early stage but we have made good progress in a number of projects. These include commissioning Standards Wise International to complete research to understand the needs and aspirations of our target beneficiaries.

We have also completed three study tours to learn from other foundations and innovation leaders. Finally, we have commissioned an expert agency from Denmark to work with us to build and test a new innovation framework that will enable us to embed innovation across the work of the Trust – to the benefit of residents and beneficiaries alike.

Our Foundation remains committed to partnering with other funding organisations to support projects that help older people flourish in the community – bringing opportunities to individuals and groups for connection, contribution and choice and we look forward to keeping you up to date on the further progress we make as the strategy unfolds.

Individual Giving update

In the first five months of the year, we received 375 applications to the fund, of which 287 (77%) were successful. We're proud to share with you that:

We awarded £145,628 to
222 older people across our area
with 181 gifts and
153 short-term grants

The number of applications we've received this year is at the highest level we have ever seen as people struggle with a myriad of financial pressures. We've seen a 25% increase in applications compared to the same period in 2022; a significant increase has been in applications for short-term grants (grants of £110 per month for three to six months).

Please remember the team are always happy for you to contact them with any questions (contact details can be found at the end of this newsletter). The team are also able to attend team meetings to discuss the Individual Giving Fund and how it may help the people you support. **Please contact us if you would be interested in this.**

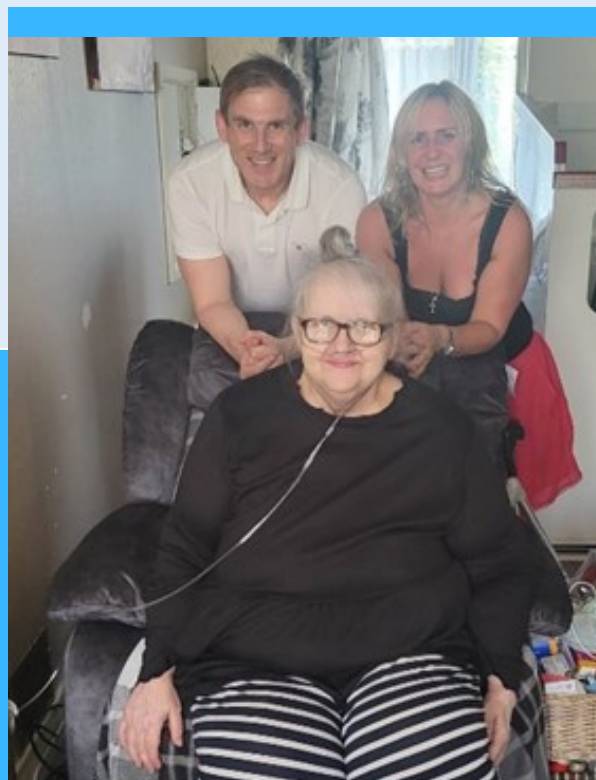


"Without the support from St Monica Trust, the foodbank and a couple of other charities, Mary does not think she would still be here. That is how important the support she received was in keeping her going through the most difficult time of her life."

We're currently in the process of making some updates and improvements to our online application process. Thank you for your patience whilst we do this as we appreciate the software behind it has been a bit temperamental in recent months. We hope the changes behind the scenes will result in a much improved experience for applicants.

For further information on the fund and to make an application, please see the dedicated section on our website [here](#).

It's a joy to share some of the many thank you messages from referrers and individuals who have accessed our Individual Giving Fund. These are always so uplifting to read and we have shared a small section of these overleaf.



Julie was "over the moon" after receiving a grant for a riser recliner chair. In the photo we have Simon, Julie and Sam Murphy.

"I can't thank St Monica's enough for helping to shine some light on what has been a very dark and difficult few months."

"Without the support from St Monica Trust, the foodbank and a couple of other charities, Mary does not think she would still be here. That is how important the support she received was in keeping her going through the most difficult time of her life."

"This £110 per month has been such a lifeline for Lilian for the past 3 months, helping her to ensure she does not fall behind on her mortgage as well as being able to afford her other essential bills and food."

"Thank you all at St Monica Trust so much for your help with the flooring for my new home. I am putting the monthly money you've given me towards living expenses and debts to the housing association in rent owed and any left over for a few much needed items second-hand for my home so I am very grateful. Thank you so much again, this has definitely changed my life for the better. A new home, a new life for me. Thank you St Monica Trust."

"Thank you for getting in touch regarding our grant. This has been a great help as it has enabled us to keep up to date with our rent payments. When I retired last October we found ourselves in a unexpectedly poor financial situation, the grant you kindly gave us has made a big difference and I would like to thank you very much."

"I couldn't believe my eyes when I read your email yesterday. I really didn't expect your unbelievably kind and extremely generous bequest to me of help of the much-needed grant of money for 6 months, which of course I will use to pay off the rent debt. The rest will help me immeasurably to ease the extreme stress of the financial distress I am under at the moment. The move was the best thing for me to give me actual quality of life and to be able to finally get out of my one room prison, but it took its toll on me and my health physically and mentally and to be honest I was very very close to breaking and a complete breakdown.

Thank you so much for your support in helping me at this very difficult time and I can't quite believe yet your genuinely caring gift to me to make so much of a difference to the situation I find myself in at this stressful time. I can finally start living my life again now and be more the confident happy person I was and this is in no small part thanks to you. I really appreciate all the help you have given me and will make sure it is used to help me at this difficult time in my life and be forever thankful to you and everyone at St Monica Trust who have been so nice and empathetic to me when I most needed it, I am so grateful for your gift, it will change my life."

Cost of Living Fund

We have been working with selected referral agencies to help address the cost of living crisis. We have been able to provide funds for people who are being significantly and adversely affected by the price increases in food and energy.

“I can turn the heating on now, it has been freezing in here for weeks.”

“We can’t stress enough what a lifeline this has been for many of the elderly people in our area and the difference it has made to their quality of life.”

Ellie Gingell, Finance Manager
Age UK South Gloucestershire

Pilot grant funding via Age UK South Gloucestershire’s new project

We are pleased to share that we have partnered with Age UK South Gloucestershire on their new Improving Homes and Well-being Service.

The service supports private homeowners who have physical and/or mental health conditions and are struggling to maintain their home. Initially for six months, we have provided a grant to enable Age UK South Gloucestershire to immediately respond to a householder’s needs through accessing the fund to pay for the required repair.

We recently visited the project – keep an eye on our website to read all about it.

Heating Replacement Project

We recognise that having adequate heating and hot water are one of the most essential basic requirements for everyone, but particularly for older, vulnerable people. We have been partnering with The Anchor Society since April 2021 on a joint fund to support individuals unable to repair or replace their boiler and consequently risk living without heating or hot water.

To date, each funder has contributed £20,000 and we are pleased to share that this project will continue for another year due to an additional contribution of £10,000 from each organisation. We have also widened the scope of the project to include all types of heating systems. The fund also helps leverage other money in from other grant sources, so it is great to see that the net impact of this fund is greater than the grants awarded.

Feedback has been very positive, with the grants supporting people who have been without heating and hot water for many months.

“It will make a great difference to have reliable heating when the weather turns colder again and it’s wonderful to have that assurance. It is brilliant to have hot water on demand and not to have to carry a kettle of hot water up the stairs to have a shave.”

“In an hour of need I really felt cared for and looked after when everything else seemed to be falling apart. Huge thanks to everyone for their help and support.”

Referrals are made via the **Centre for Sustainable Energy and WE Care Home Improvements**.

For more information, please click [here](#).

CONNECTION FUND

Launch of new fund!

With the launch of our 10-year strategy this year, it seems fitting that the theme of our next fund focuses on one of our three guiding principles: **Connection** – people live their best lives.

Enabling connections has long been acknowledged as a key component to live well. For many years, we have funded projects that support greater connections for older people, but despite years of focus from numerous and varied stakeholders, loneliness and social isolation continue to blight our society and particularly the well-being of older people.

We therefore seek to better understand and address the obstacles that prevent communities where older people flourish.

We are committed to funding projects that support our strategic aims and hope to:

- test new ways to meet people's needs.
- measure our impact to learn and improve
- generate new knowledge about what works.

Our aim is to learn from our grant making, better understanding issues around our purpose and sharing findings to improve services and inform our future approach. We have committed £100,000 to this fund and look forward to sharing details and how to apply to the fund next month.

Coronation Fund highlights

Alongside the joyful events that took place across our retirement villages and care homes, we launched a Coronation Fund to enable older people in the local community to celebrate this historic event in their own communities. Following a huge response, 52 grants were awarded, totalling **£21,766** which enabled **4,830** older people to attend an event in their own community. Street parties, tea dances, afternoon teas and community lunches took place across our region, all to help older people connect and enjoy the celebrations.

The fund met one of our core principles – **Connection** – as these events created opportunities for older people to be connected to their local communities and join in the national celebrations. We also encouraged applications that supported another of our principles – **Contribution** – where older people were at the heart of the design and planning of the event.

Examples of feedback that put a smile on our faces are:

“I have a new hip and I'm putting it to a good use!”

Mavis, 82 dancing to the Dancing Queen

“I go to a tea dance sometimes, but this is so much more fun, such fun, I haven't felt so happy in years.” Mary, 79

“Beautiful innit?” Margaret

“As manager of The Sprint may I express the gratitude my team and I feel that the funding so generously given, has enabled us to put on an event that has made so many people laugh, smile and share quality time together.

The media coverage is already having an effect as more people enquire about our service. We are always looking for ways to get our members together and have some quality time together.”



Organisational Giving update

As part of our commitment to **communities where older people flourish**, we also provide support to small, grassroots organisations that enable older people in our area to make the most of life in the communities where they live.

This year we are supporting a small community art group – **Young at H'art** – in Barton Hill, Bristol. It is a valuable group for many older people who live on their own.

We also awarded a small grant for a Memory Café to be run at the **Keynsham Music Festival**. It has been planned with support from Nailsea Memory Café and Keynsham & Saltford Dementia Action Alliance. The session will be opened by Giuseppe Dell'Anno (Great British Bake-Off winner), and will be a safe space for people living with dementia and their carers to enjoy some festival atmosphere.

Food Leaders Programme

Following our grant to the Square Food Foundation as lead partner of the Food Leaders Programme, the five week programme got underway this Spring.

Located at our Bedminster village, the programme included how to set up a cookery class for older people, intergenerational cooking, cooking on a budget, culturally appropriate cooking and a session from St Monica Trust on nutrition.



We went along to one of the sessions – read all about it on our [website](#).



St Pauls Carnival screenings

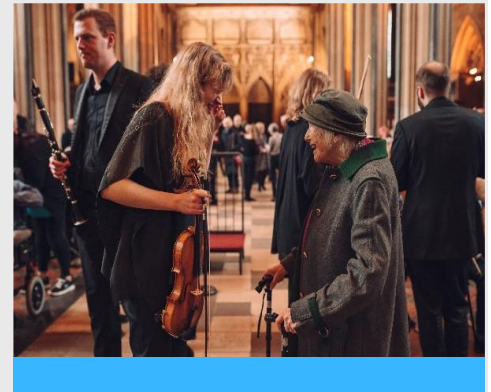
We were delighted to host St Pauls Carnival across our sites in March. The community elders who had featured in a film made with our funding came to share the film alongside their experiences with our residents. They all enjoyed the chance to meet – with one elder even having previously worked as a nurse with us! Read about the full experience [here](#).

If your organisation is receiving funding from us and you would like to talk to us about sharing your project with our residents, then we'd love to hear from you. Please get in touch via the contact details at the end of this newsletter.

Bristol Beacon

In 2022/23, we provided funding to [Bristol Beacon](#) to enable them to run activities and groups working with older people across Bristol, providing them with “much needed music and life-enriching experiences”. 308 older people have been reached, through projects Our Music Club, Mail a Musician, Pulse, and the Aurora Orchestra Concert.

The concert, in partnership with Bristol Care Homes, took place in March at Bristol Cathedral. 150 older people from across the city, including some of our care home residents, were invited to sit amongst the orchestra to experience live music like never before. One of our care home residents described it as “a dream come true” to see a live orchestra. Our colleague who accompanied them said “Our residents are not only experienced concert goers, but very informed music lovers and were unanimously overwhelmed with the intensity and immersion that the concert provided, and the unique experience presented, and that they were very privileged to be afforded.”



Sing for Fun

Through our 2020 Community Development for Older People Fund, one of the organisations we are supporting is the [West of England Rural Network \(WERN\)](#).

Now in its third and final year, we are receiving lots of learning from the number, breadth and diversity of projects that the funding has helped to unlock. One such group is ‘Sing for Fun’ which we visited earlier this year – watch a video of it by clicking on the image below .

WERN’s Executive Director Dick Whittington wrote to us to say “This is genuine asset-based community development where Tina (the funded worker) has been able to work as the mortar joining and connecting communities, individuals and families across North Somerset. This development role is so often overlooked and undervalued but through Tina, this funding has empowered communities to take an idea and let it grow in the knowledge that she is there to support and facilitate if needed.”



Funding in partnership

In 2018, St Monica Trust helped to set up the Bristol Older People's Funding Alliance (BOPFA) – a group of grant funders who work together to meet the priority needs of older people within Bristol. Since then, many projects have been funded collaboratively through this partnership. We hope that this joined up funding supports the sector by reducing the number of applications required to access multiple funding channels, alongside having one point of contact for monitoring and reporting. So far this year, through BOPFA St Monica Trust has contributed funds to:

Bristol Somali Resource Centre

for a Community Elders' Activities Co-ordinator alongside The Dolphin Society and the Grateful Society.

Southmead Development Trust

for three years for their Monday Club and a Life Planning Co-ordinator, alongside the John James Bristol Foundation, Grateful Society, and The Anchor Society.

Alive's

BME Elders Health and Well-being Project

along with Quartet, The Anchor Society, the Grateful Society and the John James Bristol Foundation.

This funding will support three BME elders groups.

Congratulations to acta!

Through our 2020 Peer Support Fund, we are supporting [acta Community Theatre](#) and their Making Time Two project – a peer-support programme that engages with isolated older people, offering them the opportunity to come together, have a hot meal, and take part in creative activities. The project is supported by a strong team of volunteers who are themselves older people and thanks to their hard work on this project and others, acta has been awarded The Queen's Award for Voluntary Service! Congratulations to all at acta.

The photo on the right shows acta staff and volunteers receiving The Queen's Award for voluntary service. Many of the volunteers in the photo support Making Time by collecting food from FareShare, preparing meals or supporting in and outside of the Making Time Two session as peer mentors.



In response to being awarded the grant, Alive's CEO Isobel Jones said:

"I just wanted to say a HUGE thank you for sorting the grants for the three elders groups. We met up yesterday, and they were just over the moon."

"I've attached a photo of the leaders saying thank you! We can't thank you enough. These groups are essential and a lifeline to many of those who attend."

For more information on these BOPFA grants, click [here](#).



FAQs

How do I find out about funds?

Our funding for individuals is open all year through our Individual Giving Fund. We aim to help older people live independently in their own community for as long as possible and do this by helping provide certain essential items, or by supporting people through a financial crisis.

For more information, including what we can and can't fund, and to make an application, please visit <https://www.stmonicastrust.org.uk/charitable-impact/grant-giving/funding-for-individuals>.

Funding for organisations is generally made available to our communities through dedicated thematic funds. We communicate the launch of a new fund through a variety of channels, including this newsletter, our mailing list, website, social media, and local networks.

We will have awarded approximately £600,000 to organisations in 2023 and we're committed to increasing our giving over the coming years, in line with our strategy.

We are also contacted throughout the year from organisations who may be facing a particular issue. We may be able to consider this or it may be something we present to the Bristol Older Peoples Funding Alliance, as appropriate.



Where does the money come from?

When the Trust was founded, our founders created an endowment which is invested through a variety of channels in the local area. Each year, we receive an annual income from these investments from the permanent endowment.

An annual amount from this income is set aside for charitable giving. In 2023, £617,000 was allocated to organisational giving and £250,000 to individual giving and we see a steady increase in allocated funds each year.

Why was my application to the Individual Giving Fund unsuccessful?

Of the applications received this year, 14% were unsuccessful. The main reason for this (59% of rejected applications) was because of a high level of income/savings. We try to be as transparent as possible and will always give a reason as to why the application was unsuccessful.

We try very hard to help where we can. When we cannot help, we always aim to signpost to other sources of help and support.

How quickly can I expect a response?

In relation to our Individual Giving Fund, you can usually expect to receive a response from us within two weeks and, provided we have all the necessary information to make a decision, an answer shortly after that. However, please be aware that we are currently experiencing an increase in applications so our turn-around may be a maximum of four weeks.

For more information please email: charitableimpact@stmonicastrust.org.uk



St Monica Trust

Charitable Impact

Giving support for over 100 years

CONTACT DETAILS

If you have any questions or queries about what we do and who we can help, or any suggestions about how we can improve the way we work, please do not hesitate to contact us.

Tel: 0117 949 4003

charitableimpact@stmonicastrust.org.uk

We are a small team and do our very best to respond to all enquiries and applications as soon as possible.

Adam Rees – Director

Catherine Robinson – Manager

Angelina Shoemake – Grants officer

Lisa Tayler – Monitoring and impact

We hope you find our newsletter useful. Please feel free to pass this on to anyone interested in hearing more about the work we do.

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