

CHARITABLE GIVING



SUPPORTING LOCAL

OLDER PEOPLE

Which brings us to our connection with you

As 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 through our funding. And we're committed to helping more people by increasing our giving over the coming years.



St Monica Trust

Charitable Impact

Giving support for over 100 years

The Charitable Giving Team

Who are we?

The founders of the St Monica Trust made it clear from the start that the charity was to support older people living in Trust property *and* in the wider community.

As the Trust has grown and developed, we've changed the way we deliver these intentions, but at its heart, the Trust continues to be about ensuring that older people have a good quality of life, and we are committed to developing communities where older people flourish.

Our Charitable Giving team aims to deliver this ambition in and around our sites as well as in the wider region.



"You have supported people we have referred when they literally have no one else to turn to and have impacted their life in such a positive way, it's nothing short of a miracle to them."

Dear Partner,

In 2022, we gave out more than £775,000 in gifts and grants to organisations and individuals, and we have been working this past year to increase awareness of our charitable giving.

We have updated our website to better reflect this significant part of the work of the St Monica Trust – click [here](#) to find out more.

I'm also delighted to share with you a summary of our new 10-year strategy which will steer the direction of the St Monica Trust over the next 10 years. The strategy is the result of a huge collaborative effort – over 1,300 people, including organisations like yourselves, helped to decide what we should focus on for the next decade and beyond. If you or your team engaged in the consultation process, I'd like to thank you for taking the time.

Read the summary of our strategy [here](#).



“At nearly 70 years of age I vowed never to have or need of a tablet. Six months on, I don't know how I done without it. I get regular photos and talks with grandchildren who live away. Using it for craft shopping unable to buy local. It is a God send, very grateful.”

Organisational Giving beneficiary

Developing our strategy has enabled us to refresh our primary purpose and aims as an organisation. Listening to all our stakeholders, we have articulated this as:

Purpose:

Communities where older people flourish

Aims:

1. Connection – people live their best lives
2. Contribution – people feel valued and useful
3. Choice – people live as independently as possible

We have set out our priority objectives and actions. As you look through the summary you will notice the following which may be of particular interest to you:

Our desire to work with external organisations to see our distinctive care for older people embedded in communities outside of our villages and care homes.

Our Charitable Foundation will seek to partner with other funding organisations to support projects that help older people flourish in the community.

We look forward to working together to support older people to live their best lives in 2023.

Best wishes,

Adam Rees

Director of Charitable Impact

Individual Giving

Our aim is to help older people live independently in their own community for as long as they choose. We do this by helping people with items they need, or by supporting them through a financial crisis via our **Individual Giving Fund**.

We provide help in two ways – through a gift and/or a short-term grant of monthly financial support which is there to help people through a crisis. However we help, it will not affect benefits, tax credits, or tax.

In 2022, we received over 700 applications to the fund, three-quarters of which were successful. We are proud to share that we awarded over £220,000 to more than 400 older people across our area. Read about how a short-term grant helped Stuart [here](#).

The winter months at both the beginning and end of the year saw a particularly high demand for our funds due to the energy and cost of living crises. Our dedicated funds proved to be a much-needed source of support for those in dire need facing fuel poverty and deeply affected by the cost of living crisis.

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



“Oh my goodness. I’m lost for words which doesn’t happen very often. You’ve made me cry. Thank you so much.”

“I just wanted to express my gratitude for your kind and timely assistance - I am so incredibly thankful to you and your team.”

“You have supported people we have referred when they literally have no one else to turn to and have impacted their life in such a positive way, it’s nothing short of a miracle to them. We as a charity are so grateful you exist and have been able to support vulnerable people.”

Organisational Giving

Working with local organisations, particularly around our retirement villages, we aim to improve facilities and opportunities for older people through funding projects.

We also aim to develop relationships with organisations to find opportunities to collaborate to maximise our impact. We deliver different types of grant programmes, but our core funding principle is communities where older people flourish.

In 2022, we awarded grants totalling over £500,000 to 101 organisations. This funding directly impacted more than 9,000 older people. Some examples of the projects and organisations we funded are:

Bath Ethnic Minority Senior Citizens Association to support BAME older people in mental and emotional crisis via an Older Persons Mental Health Worker.

Chinese Community Well-being Society - using food as a bridge to connect older people to explore well-being through food and nutrition.

Golden Oldies – supporting their Sing and Smile groups.

St Paul’s Carnival - reducing social isolation and improving mental well-being of their elders.



If you would like further information on our funds for organisations, please click [here](#).

Coronation Fund

We're pleased to announce that we've launched a Coronation Fund to allow older people to celebrate this historic event in their own communities.

This small grants programme offers grants of up to **£500** to organisations and venues, to enable them to deliver an event that is inclusive of older people who can come together in celebration and community.

Eligible groups will be registered charities, constituted groups or clubs, not-for-profit companies, Community Interest Companies, and small private enterprises, e.g. an independent café.

For further details please see our [website](#).



Cost of Living support

Since October 2022, we have been providing support in a bid to relieve some of the additional pressures faced by people due to the cost of living crisis.

In order to manage our limited resources in the most efficient manner we have partnered with a number of organisations who we work closely with – our four local Age UK and Citizens Advice charities, Talking Money, Macmillan and the Centre for Sustainable Energy.

Cost of living resources for each of the four areas we cover can be found on our website [here](#) (scroll to the bottom of the page).

Mail a Musician

We're delighted to be funding the lovely 'Mail a Musician' project as part of a grant to Bristol Beacon for their work with older people.

The project was created in response to lockdown restrictions to bring music into the homes of Bristol's communities. The initiative invites nominations from the public and takes live music to vulnerable and isolated people through pop-up concerts on people's doorsteps and several have taken place in care homes.

You might want to nominate a partner organisation, a colleague, a volunteer or someone you support. If you know someone/an organisation in Bristol who you think would love to receive a special live performance you can make a nomination using the online form [here](#).

You can also read more about our funding for Bristol Beacon on our website [here](#) – the joyful Our Music Club.



Digital Inclusion Fund

We're pleased to share with you that, following a competitive application process, we awarded £188,000 from our Digital Inclusion Fund for projects that will support more older people to get digitally connected.

As our Director of Charitable Impact, Adam Rees, states: "Over the last three years we have increasingly heard stories about older people who have been disadvantaged because they weren't able to access digital services.

Whether it be video calls, online banking or accessing benefits, older people are seeing trusted services being moved online, making them more isolated and less connected to their community. I am proud of our Digital Inclusion Fund and pleased that we can support these seven organisations to work to support those older people with significant barriers to being digitally included."

Click [here](#) to find out which organisations have been awarded a grant for this work.



Voter ID

As you may be aware, the UK Government has introduced a requirement for voters to show photo ID when voting in person at a polling station. This new requirement will apply for the first time at the local elections for BANES and North Somerset, which will be held on Thursday 4 May 2023.

This will also apply to all subsequent Local elections, Police and Crime Commissioner elections, UK parliamentary by-elections, Recall petitions and from October 2023 it will also apply to UK General elections.

The legislation was introduced by the UK government to tackle impersonation fraud. This was despite vigorous campaigning by Age UK that it was disproportionate to the actual threat of impersonation fraud, and would likely disenfranchise those who are less likely to hold recognised forms of ID, including older people.

We have informed our residents and wanted to share the information should you not yet have seen it so you can pass it on to the older people you are connected with.

For further information, go online to www.electoralcommission.org.uk/i-am-a/voter/voter-id or call the Electoral Commission helpline on 0800 328 0280.



What is a gift?

A gift is a one-off item that can help improve someone's life. We may be able to help with a range of items, such as:

- Household appliances, e.g. washing machines and cookers
- Furniture and flooring
- Disability-related items or adaptations, e.g. mobility scooter or riser-recliner chair
- Clothing
- One-off gardening costs
- Funeral expenses (next of kin or dependent)
- Decorating labour costs

What is a short-term grant?

A short-term grant is a monthly payment of £110 that is designed to help someone through a crisis. This is usually awarded for an average of three to six months. The kinds of issues we provide grants for are:

- To help adjust to a sudden loss of income, death of a partner, or when debts have built up
- The extra costs involved with certain medical treatments, e.g. chemotherapy, interferon or similar treatments
- Help whilst claiming disability benefits or addressing problems with benefit and tax credit claims

How can I apply?

You can apply in two ways; visit our website and complete an application online [here](#).

Alternatively, you can contact us for an application form by emailing charitableimpact@stmonicastrust.org.uk or by calling 0117 949 4003.

I don't meet the criteria, what can I do now?

Sadly we can't help everyone. Please click [here](#) and scroll to the bottom of the page for 'Cost of living support' to find information about alternative help available.

I meet the criteria, but need extra help; what's available?

We do our best to signpost to other sources of support. Please click on the link about where you can find information about alternative help available.

The most important thing to remember is – if in doubt please contact us!

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.

0117 949 4003

charitableimpact@stmonicastrust.org.uk

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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