



St Monica Trust

Leading the ageing
revolution

Annual Review
2017/18





St Monica Trust



FOREWORD

by the President

As I enter my third year as President of the St Monica Trust, it is with great pleasure that I introduce the 2017 Annual Review.

This year I have combined my duties as President of the St Monica Trust with Master of the Society of Merchant Venturers (SMV). It has proved to be a natural fit as the relationship between the Trust and the SMV is a long and productive one; the SMV have looked after the Trust's endowment since it was bequeathed by the Wills family in the 1920s.

April saw the official opening of the Trust's fifth retirement village by HRH The Princess Royal, and The Chocolate Quarter has quickly established itself at the heart of the local community. The intergenerational development has gained national interest as it combines luxury retirement living with a range of facilities which are open to the public and, uniquely, office spaces for local businesses, such as Pukka Herbs, IVC and St Augustine's surgery.

Intergenerational is the buzzword that seems to be on everybody's lips at the moment and I believe that the Trust's brave decision to take part in the award-winning television show *Old People's Home for 4 Year Olds* has had its role to play in this.

Like the visits from local school children and mothers and babies to our care homes, *Old People's Home for 4 Year Olds* has inspired people across the country to start their own intergenerational

programmes, volunteer for befriending services or simply pop in on a neighbour for a cup of tea.

The Trust's partnerships with Channel 4 and CPL Productions are just part of our overall strategy of forging bonds with like-minded organisations that strengthen our offering.

This year has seen us join forces with five of Bristol's leading charities to form the Bristol Older Person's Funding Alliance, which will create a £100,000 fund to transform older people's services.

We are also been honoured to provide a temporary home for St Peter's Hospice in Charterhouse while their new IPU is being built, enabling them to continue to deliver the essential services that they provide for people with life-limiting illnesses.

Forming productive partnerships will help the Trust reach more people and make more of a difference at a local, national and international level, helping us continue to be a shining example of how everyone should care for older people.

As ever, myself and my fellow trustees will continue to work hard with the executive team to ensure that the excellent work undertaken by the Trust continues for the foreseeable future.

Charles Griffiths
President of the St Monica Trust



INTRODUCTION

Leading the ageing revolution

Three years ago when we began our listening programme it became clear that what our residents, customers and service users wanted wasn't a tinkering around the edges. What they were demanding in terms of their living environments, the provision of services and community integration was nothing short of a revolution.

Previous models were more about hiding older people away behind walls, along with the issues associated with ageing. But what older people clearly said was that they want to feel valued; they want to feel part of the wider community in which they live; and they want to live in environments that reflect this. The ageing revolution is about breaking those walls down.

Since it officially opened in April, The Chocolate Quarter has gained national interest as it combines luxury retirement living with a range of facilities open to the public, as well as office spaces for local businesses.

We haven't imposed that model on people. The Chocolate Quarter was designed by the people using those services and the local community, around the core concept of breaking down the walls that stop older people being valued.

Old People's Home for 4 Year Olds was a fantastic example of the benefits of developing intergenerational relationships, which benefited both the young and old volunteers who took part.

It was also a showcase for the level of skills and experience that older people still have to offer. Many of the volunteers who applied to take part in the show either had teaching backgrounds, like Michael Hardwick, or worked in children's services, like Pat Ison and Mary Evans.

Their example, and all those who volunteered for *Old People's Home For 4 Year Olds*, are a real testament to the fact that we don't stop developing at sixty, and proves that we are all capable of creating magical things in later life.

That asset base is a real loss to society. It's vitally important that we open up opportunities for older people to use their knowledge and expertise. This will deliver really important outcomes for the wider community, as well as giving a sense of value and well-being to those involved.

The ageing revolution is not just about retirement living, but also about the environments in our care homes and their functionality. A radicalisation is required in terms of our thinking and an acceptance that what has been done in the past has not been great.

Traditionally, care home environments have been very protective because of the perceived vulnerability of



“Older people clearly said that they want to feel valued; they want to feel part of the wider community in which they live; and they want to live in environments that reflect this.



the residents that are cared for there. However, as with retirement villages, the best outcomes come from challenging perceptions and breaking those walls down.

Care homes shouldn't be off-limits. The visits by both mums and babies and by the children of Sandford Primary School, have seen some hugely exciting bonds develop with our residents at Charterhouse Avon and The Russets, respectively.

Technology will also have an increasingly important part to play both in our retirement villages and care homes. The new generation of older people are more tech-savvy and demanding more technology, which means we will have to look closely at how it can enhance their lives.

As an organisation, we need to be bringing developers together with older people, so they can co-design technology and make sure it's useful. Our staff teams will also be involved in this, as well as being trained in how to use it.

Whereas the ageing revolution will be happening over many years, you could say that, as an organisation, the St Monica Trust has undergone a similar revolution in the last three years.

I don't think our residents, staff, volunteers and trustees realise just how much they've contributed to a massive sea change that has occurred in such a short space of time.

Not just how the organisation works, but how the Trust is affecting the issues surrounding ageing at a national and international level.

When I first became Chief Executive, I would attend conferences and no one knew what the St Monica Trust was. Now when I go to conferences, everyone is talking about what the Trust is doing: *Old People's Home for 4 Year Olds*, *Gogglebox*, *The Chocolate Quarter*, the Bristol Older Person's Funding Alliance and School of Food, to name just a few.

As an organisation we were brave enough to take a calculated risk to dare dream of these projects and we had the hugely talented staff team to achieve those dreams.

This is why I think the Trust is in an ideal position to be leading the ageing revolution. I say this with great humility because, as with any revolution, it's important to recognise that the power stands with the people: our residents, their families, customers, staff, volunteers, trustees and the general public.

And only by leading the ageing revolution together will we be able to create meaningful change in our society and reach a level where we're delivering what older people want us to deliver.

David Williams

Chief Executive of the St Monica Trust

GROWTH

The Chocolate Quarter

If you ever find yourself near Keynsham and listen very carefully you may just be able to hear something. It's not the infamous Bristol 'hum', but more of a buzz and it's centred around our newest development.

Since it was officially opened by HRH The Princess Royal in April, The Chocolate Quarter's unique combination of luxury retirement living with a range of facilities that are open to the public, has been gaining national attention.

Since the first residents moved in during October 2017, more than 100 residents now call The Chocolate Quarter their home. This includes David Herneman who lives on the same floor of the former Cadbury's factory that his father worked on for almost 30 years. Opening at the same time, The Chocolate Quarter's 93-bed state-of-the-art Charterhouse care home is providing vital services for older people in Bath and North East Somerset, including respite, dementia, nursing and end of life care.

B Block has won rave reviews for its authentic wood-fired pizzas and the popularity of Somer Dining's traditional Sunday lunches are ensuring regular visits from residents' relatives at the weekend. Brookmead Arcade has become a bustling high street with Figo Hairdressers, Figo Men, Tiger Lily nails, Charlton cinema, an art studio and health spa, including a sauna, jacuzzi and pool.

The commercial space has been occupied by Pukka Herbs, IVC and St Augustine's GP surgery who between them employ more than 300 people. While events like the Community Open Day and Chocolate Festival have helped establish the development at the heart of the local community.

But this wasn't a model for retirement living that was imposed on people. The Chocolate Quarter was designed by the people using those services and our next development will be designed in exactly same way.



STRATEGIC AIM:

We will commence operation of The Chocolate Quarter as our fifth retirement village in the autumn of 2017.

GROWTH

Old People's Home for 4 Year Olds

It's been quite a year for eleven very special residents at our Cote Lane retirement village. Pat, Monica, Mary, Sheila, Lorna, Margaret, Michael, Zina, Linda, David and Hamish, all volunteered to take part in a ground-breaking social experiment filmed by CPL Productions for Channel 4.

Old People's Home For 4 Year Olds aimed to prove that bringing together retirement community residents and pre-school children could help transform the lives of both groups for the better.

The two-part series which aired in August and averaged an audience of 2.8m, saw the St Monica Trust residents speak openly about the issues facing older people, including their struggles with depression, lack of mobility and loneliness. Yet in a series of extraordinary and moving scenes, the experiment showed the transformative power that simply being around the children had for our residents.

Beyond the Trust, the programme had a magical effect on the entire country: children decided to visit their elderly parents more regularly; younger people have joined befriending schemes and visit isolated older people in the community; people have popped in on their elderly neighbours to see how they are; and care homes up and down the country have been inspired to create similar schemes.

All of this culminated in the decision for CPL to return to Cote Lane in November and film *Old People's Home for 4 Year Olds at Christmas*. The show was sponsored by Age UK and spearheaded a national campaign to raise awareness of the problem of isolation among older people.



STRATEGIC AIM:

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



Then in early 2018 it was announced that the government has appointed the first-ever Minister for Loneliness. Their remit is to take on the “generational challenge” to tackle an issue affecting about nine million people in the UK, young and old.

We're not for one second claiming that *Old People's Home For 4 Year Olds* was responsible for the appointment of a Minister for Loneliness. But the programme was certainly part of an intergenerational zeitgeist, which made loneliness and the benefits of bringing different generations together, part of the national agenda.

And it's all down to eleven brave residents and their ten little friends, who are still visiting them to this day.



GROWTH

Bristol Older Person's Funding Alliance

The Trust's alliance with five of Bristol's leading charities represents a more strategic vision of delivering community services through grant giving. Rather than funding in the same old way, it will encourage more business participation among older people, helping to deliver new and innovative services.

Think of it as being like Dragon's Den – only with more smiles – where each member of the alliance can choose which project they would like to fund and be responsible for that particular project's delivery. Projects can also be jointly funded between members of the alliance who will also offer to share their expertise with the organisations applying for funding.

The £100,000 fund will help organisations become more sustainable, improve existing services or develop innovations that will have a positive effect on the quality of life for older people. The type of projects that can be supported by the fund include setting up social enterprises, gaining skills to enhance fundraising activities, creating mergers and using technology to improve their efficiency and reach.

The alliance will be chaired by the Dean of Bristol, Dr David Hoyle and is made up of the The St Monica Trust, Quartet Community Foundation, The Anchor Society, John James Bristol Foundation, The Dolphin Society and the Society of Merchant Venturers.

Managed by Bristol Ageing Better, the fund will help organisations change and adapt to meet the challenges posed by cuts to their traditional sources of funding.



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.



SERVICE

World-class

The St Monica Trust has become highest scorer in the entire UK healthcare sector in its latest Hospitality Assured assessment.

The Trust retained its Hospitality Assured Premier status for the tenth consecutive year with its highest-ever score of 85.2%.

In their report, the Hospitality Assured assessors said: “This truly world-class score is an increase of 1.5% over the 2016 score and is a reflection of the many valuable and progressive changes, improvements and enhancements that have been implemented in that period.

“There exists within the Trust a strong desire to achieve high levels of excellence in all that it undertakes. The Trust generates huge levels of loyalty and commitment among its employees and they are totally committed to creating memorable moments and an outstanding customer service experience.

“The Trust takes its responsibility within the Community seriously and strives to ensure that it has a leading voice in the area. The focus on the environmental, economic and social impact of the Trust’s activities is being thoroughly analysed.”

Hospitality Assured is the quality standard created by the Institute of Hospitality specifically for customer-facing businesses. The process enables organisations to reach and exceed their full potential by following world-class processes, customer service standards and employee engagement.

The assessment was undertaken against the requirements of the Hospitality Assured Standard for Service and Business Excellence and took place over two days at The Chocolate Quarter in Keynsham. The assessment involved a review of the Trust’s operations in facilities, marketing, communications and human resources.

The assessors added: “The level of co-operation and friendliness was appreciated and, when added to all the hospitality that was provided, made the assessment visit, as always, an enjoyable and rewarding experience.”



STRATEGIC AIM:

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



SERVICE

Good neighbours

A good relationship is everything. That goes for our relationship with our residents, their families, our customers, colleagues, volunteers, the community and other like-minded organisations. So when St Peter's Hospice asked about finding a temporary home for their Inpatient Unit, we said "How can we help?"

And it turned out we helped them by providing a temporary home for St Peter's Inpatient Unit at our Charterhouse care home, while their new one is being built at their site in Brentry.

St Peter's Hospice is a Bristol charity caring for adults with life-limiting illnesses. They aim to improve the quality of their living and dying while extending care and support to their families and loved ones.

The St Peter's Hospice site at Charterhouse is fully staffed by the Hospice's highly experienced multi-disciplinary team to ensure patients, and their loved ones, continue to receive the very best possible care.

As with any good neighbour, not only do we know we can always pop round each other's 'home' for a cup of tea, but we're also taking the opportunity to share best practice and learn from one of the leading lights in the world of caring for those with life-limiting illnesses.

And what kind of a neighbour would we be if we didn't also draw your attention to their Room to Care Appeal, which aims to raise £1.53m to complete the redevelopment of their new Inpatient Unit?

To make a donation to the Room to Care Appeal and help build a 21st Century Hospice for Bristol, visit roomtocare.co.uk, call 01275 391400 or visit one of fifty-one St Peter's Hospice charity shops.



St Peter's Hospice
For Patients, Families and Bristol

STRATEGIC AIM:

We will commence operation of Charterhouse care home at The Chocolate Quarter in the autumn of 2017.





SERVICE

Move in haste...

“Marry in haste repent at leisure” is a well known saying, but when Pat and Paul had to find retirement accommodation quickly, it could have been a case of “move in haste and repent at leisure”.

But as Pat explained, their experience since moving into Westbury Fields couldn't be more different: “It worked extremely well for us. As soon as the front door opened and we looked inside it won our hearts. We saw the sun shining in through the back doors and the cricket pitch outside and said, ‘Yes, please.’”

Pat and Paul had been on the Trust's waiting list for two years, but their circumstances changed when Paul suffered a fall at their house. “After Paul had his fall and became ill, moving became a necessity for us. I was also struggling to cope with maintaining the four bedroom house that we were living in.”

Introduced in 2017, the new allocations process was designed to take into account the needs and aspirations of people wishing to move into the Trust's five retirement communities across Bristol and North Somerset. Under the new allocations process, Pat and Paul were given a higher priority due to the fact that they needed to find somewhere quickly following Paul's fall.

The Trust's Sales Manager, Jill Whittaker said: “The new allocations shortlist is for people who would like to move within the next six to twelve months. People on the shortlist will be asked to complete a questionnaire to help the sales team identify the right property for them, just as we did for Pat and Paul.

“They are such a devoted couple and we're so pleased to hear that the new allocations system has helped them find their new home. As well as meeting their own needs with regards to providing a suitable environment for Paul, they are also going to be a huge benefit to the wider community at Westbury Fields. We're very lucky to have them living with us.”



STRATEGIC AIM:

We will publish our resale allocations strategy for our leasehold properties and implement the processes agreed.



SERVICE

Breaking down the walls

We're always working with our residents and customers across the Trust to create opportunities for community integration.

It's vitally important that we open up opportunities for older people to use their knowledge and expertise to deliver really important outcomes for the wider community, as well as giving a sense of value and well-being to those involved.

We've taken what we've learnt developing The Chocolate Quarter, and each new St Monica Trust development will be designed in exactly the same way – by the people who are using our services.

They may have different elements, but the core concept will be about breaking down the walls that stop older people being valued and promoting mutually beneficial relationships with the wider community.





STRATEGIC AIM:

We will look at new ways of integrating our villages into local communities to make them more rewarding places for our residents to live.





STRATEGIC AIM:

We will agree partnerships with organisations that strengthen our offer to colleagues and the Trust.



PEOPLE

School of food

If you were an aspiring chef, wouldn't it make sense to learn from the very best? That's exactly what we thought, so in 2017 our very own Adrian Kirikmaa and Michelin Star Bristol chef, Josh Eggleton, joined forces with Weston College, St Katherine's School and Ashton Gate Stadium to address the issue of attracting young people into the care and hospitality industries.

Together they created The School of Food, a vocational programme for chefs, which provides the most relevant and up-to-the-minute training for the development of best practice throughout the South West.

The School of Food is open to young people looking for an entry point into the industry, as well as those already working within the care sector, restaurants, hotels and food businesses.

The course is taught by chefs, offering apprenticeships across the South West with organisations like the St Monica Trust, and offering visits to food producers, artisans and the opportunity to cook at high profile events and locations.

The School of Food curriculum will cover everything from food preparation, nutrition and chef and knife skills, through to food knowledge, how to stock take and even the financial aspects of working in a kitchen. Students will be mentored by a professional chef who will provide regular assessments and workplace visits to monitor progress.

Head of Catering at the St Monica Trust, Adrian Kirikmaa and co-founder of The School of Food explained: "We've been working closely with chefs, producers and educators to design a curriculum we feel will really benefit young chefs and give them all the tools they need to succeed.

"What we're looking to do with The School of Food is to pair practical skills and food knowledge with actual industry experience in professional kitchens. By the St Monica Trust placing its support behind this project we'll be helping to nurture the next generation of chefs who will be cooking for the Trust's residents and customers for years to come."

PEOPLE

Leadership skills



STRATEGIC AIM:

Our leadership skills training will continue to maintain our high standards.

In the world of football, form is temporary, but class is permanent. As the likes of Sir Alex Ferguson and Arsene Wenger would confirm, management plays an important part in this. Good managers set the standards, ensure their team is motivated and keep everyone on board to achieve their goals.

The same goes for our St Monica Trust nurses. Management plays just as an important part in their role as it does in football. As part of the Trust's Leadership and Skills Training programme, all our nurses sign up for a people management programme. We want to make the lives of our residents and staff better and this all stems from good leadership.

And this doesn't just apply to nurses. The Trust's Learning and Skills programme is for anyone who is managing a person, part of the organisation or is being developed for a managerial role under our succession planning. This can involve one-to-one coaching, having a coach working alongside them, classroom based learning, bite-sized learning or funding colleagues to study courses externally.

Over the last two years the Learning and Skills programme has been embedding a coaching culture at the Trust and we've seen results improve dramatically – both in terms of staff morale, productivity and the Trust's reputation.

We've also won quite a few trophies. Here's a picture from this year's Care and Support West Awards where our care services won an unprecedented five awards.

Sarah Saunders won the Nurse Front Line Worker Award, Sandford Station's Care and Support Team won the Older People Care Award, John Wills House won Nursing Home of the Year and Wendy Leaman won the Care Home Registered Manager Award. Last, but certainly not least, The Beeches team were recognised with the Outstanding Contribution Award, which was the final award presented on the night.

No stranger to trophies themselves, we're sure Sir Alex and Arsene would approve.

PEOPLE

54 steps

Doesn't sound like much, does it? But to James it might as well have been 54,000. When he was discharged from hospital to Charterhouse, it was immediately apparent to his nurse Kate that something was wrong.

James explained to Kate that he lived in a flat on the fifth floor of an old building which had no lift. An internationally renowned artist, James was desperate to return to his flat to select his artwork for an exhibition at the Victoria Gallery in Bath. He presumed that this wasn't possible as he was now in a nursing care home.

Kate thought otherwise. When someone arrives at Charterhouse the first thing that is completed is the 'about that person' section on the front of the Trust's care plans. There's a very good reason for this: without knowing what someone's background is, where they worked, where they lived, what their passions are – how can you care for them?

Seeing James' whole persona change when he spoke about art and how determined he was, Kate knew he had the 'will'. Now Kate set about finding the 'way' to get James up those 54 steps. Over the next few weeks, James worked tirelessly with Charterhouse's physio team and together they set a date for James to return to his flat.

When the big day arrived James climbed each and every step with Kate by his side. Kate said: "In going to James' flat and seeing his artwork, I learned why he'd painted certain things, where he's lived, where he's travelled and also that he represented himself in most of his paintings. I felt very privileged."

Then Kate had another idea: why not hold an exhibition of James' work at The Chocolate Quarter? "I'm very passionate about seeing people for who they are and not their disability. James does need help because of his Parkinson's, but now everyone has seen what he's capable of."





There's not a day when Kate and James don't sit down to discuss his upcoming exhibition at The Chocolate Quarter. "You can see the difference in James. The exhibition has him so enthused about the future. You can see it in his eyes that he's much more alert. He's holding his head higher and his communication has markedly improved."

Kate has worked at the St Monica Trust for almost two years, first at The Russets dementia care home at Sandford Station, before moving to Charterhouse when it opened in the autumn.

As she explained, for her, nursing has always been about more than just the medical side of it. "The St Monica Trust is the only place I've worked as a nurse where I've been supported and encouraged to do this sort of thing.

"We're making a real difference to James' well-being and hopefully we can do the same for all our residents."

STRATEGIC AIM:
We'll continue to provide a range of specialist care offerings to meet people's needs and expectations.

PEOPLE

Bright Sparks

We want to make it easier for people with the same values as us to join our team. One way we're doing this is by working closely with schools and colleges to not only identify future talent, but also to inspire young people to work in the care sector.

One of the programmes we've partnered with is the Bristol Rugby Community Foundation's life-changing Bright Sparks, which is aimed at young people who are at risk of persistent non-attendance and permanent exclusion from school.

The engaging programme sees two members of staff placed at designated secondary schools for two hours per week throughout the entire academic year. Using a variety of rugby union skills and team building games, the scheme engages disaffected young people and helps them to improve their behaviour in the classroom.

The Year 9 students recently came to The Chocolate Quarter's B Block pizzeria and were shown the process of making pizza from start to finish with chefs Chris Barry and Simon Lucian. They learnt about the demands of being a chef as well as perfecting the craft of pizza making as they each made a pizza of their own. Matt Beynon, of Wogan Coffee, also led a workshop showing the Bright Sparks students how to make specialist coffees, teas and hot chocolates as well as teaching them about the origins of each of the products.

Simon Weaver, Programme Manager at Bright Sparks said: "They're Year 9 students, but they've grown up quickly and the life experience they'll gain from experiences like this will put them in a good position for the future.

"They'll go back to school, full, content and happy that they've put something together and worked well on their own and together as a team."



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

BUSINESS

The Planet Mark

The Trust's commitment to year-on-year progress in sustainability has been recognised with The Planet Mark™ Certificate.

In 2017 the Trust calculated the emissions of its retirement villages and set a target to reduce emissions by 5% annually. This includes emissions from energy use in the Trust's buildings (natural gas, purchased electricity and biomass), from water usage, business travel and waste disposal.

To meet its sustainability commitments going forward, the St Monica Trust will:

- Carry out energy audits throughout the organisation's estate.
- Introduce a 'switch off' awareness campaign.
- Produce and implement an organisation-wide Sustainability Plan.
- Develop staff engagement programmes and workshops focusing on energy reduction and sustainability awareness.
- Increase the availability of recycling facilities throughout the organisation's estate.

The award means the St Monica Trust is the only care provider in the UK to hold The Planet Mark™ certification. A donation has also been made on behalf of the Trust to the Eden Project and Cool Earth to support education on climate change and to protect an acre of endangered rainforest.

Facilities Operations Manager, Mark Thomas said: "Committing to The Planet Mark™ is key to us. Not only in measuring our carbon footprint, but actually being true to the values of the St Monica Trust by being open and honest about our impact on the environment.

"The Trust is embracing new technologies to reduce environmental impacts and engaging people in the programme, while continually focusing on providing the best possible care experience. We look forward to working more closely with The Planet Mark™ team to reduce our carbon footprint and further developing our sustainability strategy."



STRATEGIC AIM:

We will ensure that our projects minimise environmental impact and report on these achievements.

BUSINESS

Virtual reality

Where would you like to go to today? Riding with the Patagonia Gauchos in the Andean foothills, free climb Yosemite's El Capitan or ski the slopes of Chamonix?

Through his work with the Motor Neuron Disease Association, filmmaker Leon Ancliffe met Sarah. Sarah has lived with MND for more than 16 years and has minimal body movement. Asking Sarah if there were any experiences she wished she'd had, her reply was unequivocal: "I always wanted to swim with dolphins".

Through his connections in the VR entertainment industry, Leon was able to organise a demonstration for Sarah. "The impact was amazing. Sarah said that for the first time in 16 years she felt able-bodied. It was immediately clear to us that VR could have life-changing impacts on people like Sarah, who face isolation and limitations in experiencing things we might otherwise take for granted."

The potential for VR in the care sector extends far beyond creating bucket list experiences for individuals with life-limiting illnesses. Realising this the Trust has commissioned Leon to work with our IT team to develop a dedicated virtual reality suite at The Chocolate Quarter.

Together they are exploring the possibility of using VR to improve residents' level of pain; as reminiscence therapy to trigger past memories in residents living with dementia; or relaxation therapy for a nurse or primary carer by booking themselves into the suite for a thirty minute stroll through a rainforest.

The world is turning to technology more and more and the Trust's IT team is creating the systems we need to work smarter and more efficiently. From virtual reality and robotics, to electronic care rostering and future-proofing our IT infrastructure, we are committed to using technology to enrich the lives of our residents and staff, just like for Sarah.



STRATEGIC AIM:

We will use technology to enrich the lives of our residents.





BUSINESS

Tenant farmers

With lush green grass beneath his feet, surrounded by open countryside and rolling hills in the background, Shane Noble could be forgiven for thinking that he's back on his Shropshire farm.

Every four or five years, the Trust's tenant farmers are invited to visit the St Monica Trust. This year Shane and 70 of his fellow tenant farmers visited The Chocolate Quarter and Merchant's Hall.

Shane has been a farm manager for 17 years with P D Hook. His poultry farms supply eggs, which are then grown on, to provide the UK's leading supermarkets with 275,000 free-range chickens every week. He said: "It was my first visit to the Trust and I was very impressed with the set-up at The Chocolate Quarter. The facilities were superb and considering that they were cooking for some of the best meat producers in the country, the food was very well received."

"It was interesting to see how our rent is helping to fund not only new developments, like The Chocolate Quarter, but also all the important work the St Monica Trust is doing in the community."

The Society of Merchant Venturers (SMV) has looked after the Trust's endowment since it was bequeathed by the Wills family in the 1920s and more than 60% of the endowment is held in land that is farmed by tenant farmers like Shane.

SMV's Estates Committee makes regular visits to the tenant farmers on a cyclical basis, visiting each individual farm every three years, meeting with the families to discuss everything from succession to diversification. The visits help the Estates Committee to build strong relationships with the tenant farmers, some of whom go back three generations, and also to understand the challenges they are facing.

Purchasing land for long-term investment and supporting the tenant farmers is just one example of how SMV is helping to provide the financial and organisational sustainability that is essential for the Trust to deliver certainty and security for our customers and colleagues.

FINANCIAL STATEMENTS

In 2017, the Trust spent £38.1m on its charitable activities (an increase of 35% on the previous year of which The Chocolate Quarter activities costs accounted for 30% of the increase). Total income was £38.9m (26% higher than in 2016 of which The Chocolate Quarter accommodation income accounted for 22% of the increase). This performance resulted in the Trust generating an operating surplus of £794k for the year, which was added to the Trust's financial reserves.

The Trust is reliant upon the income generated from its investments to support its charitable operations. In 2017, the net investment income was £5.4m, which was in line with the forecast and enabled the Trust to support the established care services, as well as to open The Chocolate Quarter.

The Trust's residential care services (care homes and retirement living) helped 1,507 individuals in 2017, of which 34%, or 514 people, were afforded financial support by the Trust. The Trust's Care at Home service also assisted 310 individuals in their own home. In addition, the Community Fund helped 445 individuals in financial need plus an estimated 778 people attending 11,778 sessions through the activities of the Community Development team.

In 2017, therefore, a total of 1,737 people (57% of 3,040 service users) were supported financially by the Trust (2016: 1,776 people were supported financially representing 57% of 3,068 service users).

£'000s	2017	%
Operating Income and Expenditure		
INCOME		
Investment income after costs of generating funds	5,389	13.9
Income from residents of our care homes and sheltered housing	20,261	52.1
Income from services provided to residents	2,750	7.1
Income from accommodation	9,116	23.3
Income from the care at home service	1,234	3.2
Other income (training, rent, services, miscellaneous)	144	0.4
Total Income	38,894	100%
EXPENDITURE		
Staff and purchases for the residential and support services	29,283	76.9
Community Fund expenditure	532	1.4
Accommodation costs	6,807	17.8
Depreciation of assets	1,422	3.7
Governance of the Charity	56	0.2
Total Expenditure	38,100	100%
Surplus of Income over Expenditure	794	–



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