

# Improving lives

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Social Impact Report 2018



St Monica Trust

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We use research evidence and regular feedback from our residents and customers, so that our communities can continuously develop, helping to give the best experience of ageing.

## Community integration

A recurrent theme from consultation with older people relates to their desire for access to places where people of all ages can meet and socialise.

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## Partnering organisations

We are committed to improving the quality of life for as many people as we can, influencing positive attitudes to ageing and contributing to excellence in our field.

## Community Impact Team

Our Community Impact Team works with individuals and organisations to help empower older people in and around Bristol to make changes in their own communities.

## Community Fund

The Trust's Community Fund provides more than £500,000 in gifts and grants that go directly to those who will benefit the most.





## Business

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### Sustainability and responsible sourcing

One way of limiting our impact on the environment is to commit to reducing the Trust's energy consumption. In measuring our carbon footprint we are being true to the values of the St Monica Trust by being open and honest about our impact on the environment.

## Colleagues

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### Employee benefits

We want the St Monica Trust to be 'A Great Place to Work' and endeavour to deliver all the elements that make work rewarding, challenging and fun for colleagues.

### Training and apprenticeships

We value our people and our apprenticeship initiative supports staff across the Trust to achieve higher level qualifications through sponsorship.

### Empowerment

The Trust works with staff so they are empowered and encouraged to take the initiative, think outside the box, work in partnership with others and create their own learning opportunities.



## Introduction

“

*Social impact is about doing the right thing day-to-day and delivering what matters most to people. Making someone smile every day is as important as national initiatives and we shouldn't lose sight of that.”*

**David Williams**

Chief Executive of the St Monica Trust



**Social impact is the value delivered by the St Monica Trust in terms of improving the lives of everyone our services touch. For our residents and customers, it's delivered by creating vibrant communities that meet the outcomes for all generations. For our staff it's about making people's jobs more satisfying and rewarding. And for Bristol and the surrounding area it's about partnering with outside organisations and supporting disadvantaged older people through the work of our Community Impact Team.**

As an organisation, the Trust is far more outward looking than it was before I arrived four years ago. Part of our bigger external presence is seeing and understanding the needs of the wider community across Bristol and the surrounding area. This is part of the Trust's original deed and a core part of the Trust's future direction. Now, more than ever, we're keen to partner with organisations, community groups and the health and social care sector to help improve the outcomes of older people living in Bristol.

Bristol is a vibrant and exciting city, but it has significant issues, such as the disparity of health, wealth and life expectancy between the richest and poorest areas. Part of the Trust's vision is how we can use our resources to help address this disparity. Take the training academy that the Trust

is creating in Keynsham for example, which will draw talent from the parts of Bristol where only 4% of younger people go to university. The Health and Social Care sector is crying out for staff, so why not educate the young people who, for whatever reason, can't attend university, get them enthused about Health and Social Care, give them a career and fulfil the needs of the UK's growing population of older people?

This is just one example of how, by thinking more laterally, the Trust can work across traditional boundaries to improve outcomes. We need more staff, so let's educate the young and grow our own. As an organisation, we want better health for older people, but we can't provide all the services that are needed. Through the work of the Community Fund and Community Impact

Team, we are helping community groups across Bristol to become sustainable and provide better health outcomes for older people.

Social impact is also about doing the right thing day-to-day and delivering what matters most to people. Making someone smile every day is as important as national initiatives and we shouldn't lose sight of that. It's our dedicated staff teams and volunteers who are responsible for putting those smiles on people's faces and, as an organisation, it's only right that we try to return the favour.

The Trust is one of the few organisations in the health and social care sector that has said we're not going to allow staff to be worse off year on year. As the effects of austerity continue to bite, it's important to recognise that people must earn an appropriate wage to support their families. To that end, we've made a commitment to our staff to reward their contribution and dedication, giving a Trust-wide 3% pay rise, which is actually above the inflation curve. We also recognise that our front-line teams work in a high pressured environment and our HR team are committed to improving staff welfare at all levels of the organisation. Recent initiatives include, running twice yearly well-being weeks, which offer free activities, such as yoga, mindfulness and money

## Awards won in 2018

managing workshops. The HR team have also successfully launched a well-being website and agreed an action plan with Time to Change to highlight mental health issues and operate a free Employee Assistance Programme. This gives staff access to a range of confidential health and well-being services.

It's the doing that makes the difference and taking a bold approach is how we affect change. The Bristol Older People's Funding Alliance is the first time in 400 years that Bristol's biggest charitable institutions have worked together. We were told that it would never work, yet the Alliance is on its second tranche of funding and has been increased to £150,000. The Funding Alliance now has a life of its own and no longer depends on direct input from the Trust. The Trust was brave enough to participate in Channel 4's Old People's Home for 4 Year Olds and we are now benefiting from having our media profile raised to national and international level. Opening up our sites and putting community integration at the heart of our strategic plan was also a brave thing to do. Likewise giving our residents a voice as to how they want to see their communities develop, through the setting up of village councils.

Looking ahead, we will see even more partnership working and a more integrated strategic approach with local authorities to produce better outcomes for older people. Housing, health, social care and education can no longer work in isolation. We need to all work together and the Trust is well placed to bridge those gaps, just as we are doing with the Training Academy.

It is also becoming increasingly clear that there is not enough money in the system to provide health and social care for the UK's older population. As an organisation, we have finite financial resources, which we need to use wisely to reach more people and maximise outcomes for those groups. It will be a difficult balancing act which our efficiencies programme will be instrumental in helping us achieve.

The future of health and social care is complex and it won't be easy to deliver, but taking brave decisions, embracing innovation and working in partnership is where we need to go both as nation and as an organisation. □

**The Chocolate Quarter  
Best Regeneration Project**  
Pinders Healthcare Design Awards

**Training Team's MUD programme  
Best Operational Programme**  
TJ Awards

**St Monica Trust  
Healthcare Caterer of the Year**  
Foodservice Cateys

**St Monica Trust  
Hospitality Assured's special  
20th Anniversary Award**  
Hospitality Assured

**The Chocolate Quarter  
Residential Development Winner**  
Bath Property Awards

**John Wills House Community Fridge  
Food Redistribution Award**  
Waste2Zero Awards

**David Williams  
Making a Difference Award**  
Third Sector Care Awards



# St Monica Trust and Social Impact



Spectrum Programme Manager,  
Kris Tavender - Bristol Bears  
Community Foundation

## Our mission

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

### How we work

Our passion for enabling health, well-being and positive ageing drives everything we do. Because we care about everything that affects people's lives, we commit our charitable resources to make the most positive impact in those areas that we can – particularly for our residents, our customers, and our staff – but also for people living in the communities around our villages and beyond. In order to do this, the following are pivotal to the way we work: collaboration and partnerships; using research and evidence to inform practice; continuous improvement; innovation and contributing to influencing excellence in our field.

### How we operate

Since the charity was established in 1920, The Society of Merchant Venturers has looked after the St Monica Trust's endowment, which was bequeathed by the Wills family. The day-to-day operations of the Trust are funded by an annual income generated from this endowment fund and with income from residents and customers who are able to cover their own fees. This successful formula provides the Trust with an income that supports the Trust's core activities and frees up the endowment income to provide support to individuals who need it, inside and outside our villages. The unique combination of our status as a charity and our strong financial position, enables us to strive to give older people the best experience of ageing regardless of means.

### Social Impact

Social Impact is at the heart of what the St Monica Trust does. In a nutshell, it's the difference we make for others: how we benefit individuals, communities and the wider society along with the environment in which we all live. It is critical for us to be able to evidence and demonstrate how, and how much, we are affecting lives in order to understand how well we are doing as an organisation, what we could be doing better and how best to make improvements.

# Residents survey

## This Report

The effectiveness of our social impact is central to the Trust's five year strategic plan. This summary report provides headline highlights from across the organisation in the first section, with more detail provided in the following sections presented under four of the Trust's key strategic aims:

### CUSTOMERS

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

**Strategic aim:** The building and maintenance of supportive and enriching communities.

### GROWTH

We want to grow the Trust in order to impact positively on more people's lives.

**Strategic aim:** Increasing the impact on well-being of older people in and around Bristol.

### COLLEAGUES

We want 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.

**Strategic aim:** Continue to make people's jobs more satisfying through employee benefits, training and empowerment.

### BUSINESS

Ensure financial and organisational sustainability to be able to deliver certainty and security for our customers and staff.

**Strategic aim:** Continue to ensure sustainable financial planning.

Keeping a finger on the pulse of our residents' and customers' needs, preferences and feedback, is hugely important. We use a wide range of methods to do this, including resident meetings, village councils, eXplore forums, surveys, and the "What matters to you" initiative for staff to find out what really matters to the people they are caring for. Very positive feedback is regularly received from residents, particularly concerning caring staff, their living environment and their sense of community.

### Some highlights from the 2018 residents survey, include:

High satisfaction with important areas of life shown by residents and customers  
% choosing 'I strongly agree' or 'I agree':

**97%**  
'I feel safe'

**96%**  
'My carers are friendly, polite and kind'

**94%**  
'I would recommend Care at Home to people I know'

**89%**  
'My carers have the skills to meet my needs'

**88%**  
'I have peace of mind living at village/care home'

High satisfaction with services provided in our 2018 surveys % choosing 'I strongly agree' or 'I agree':

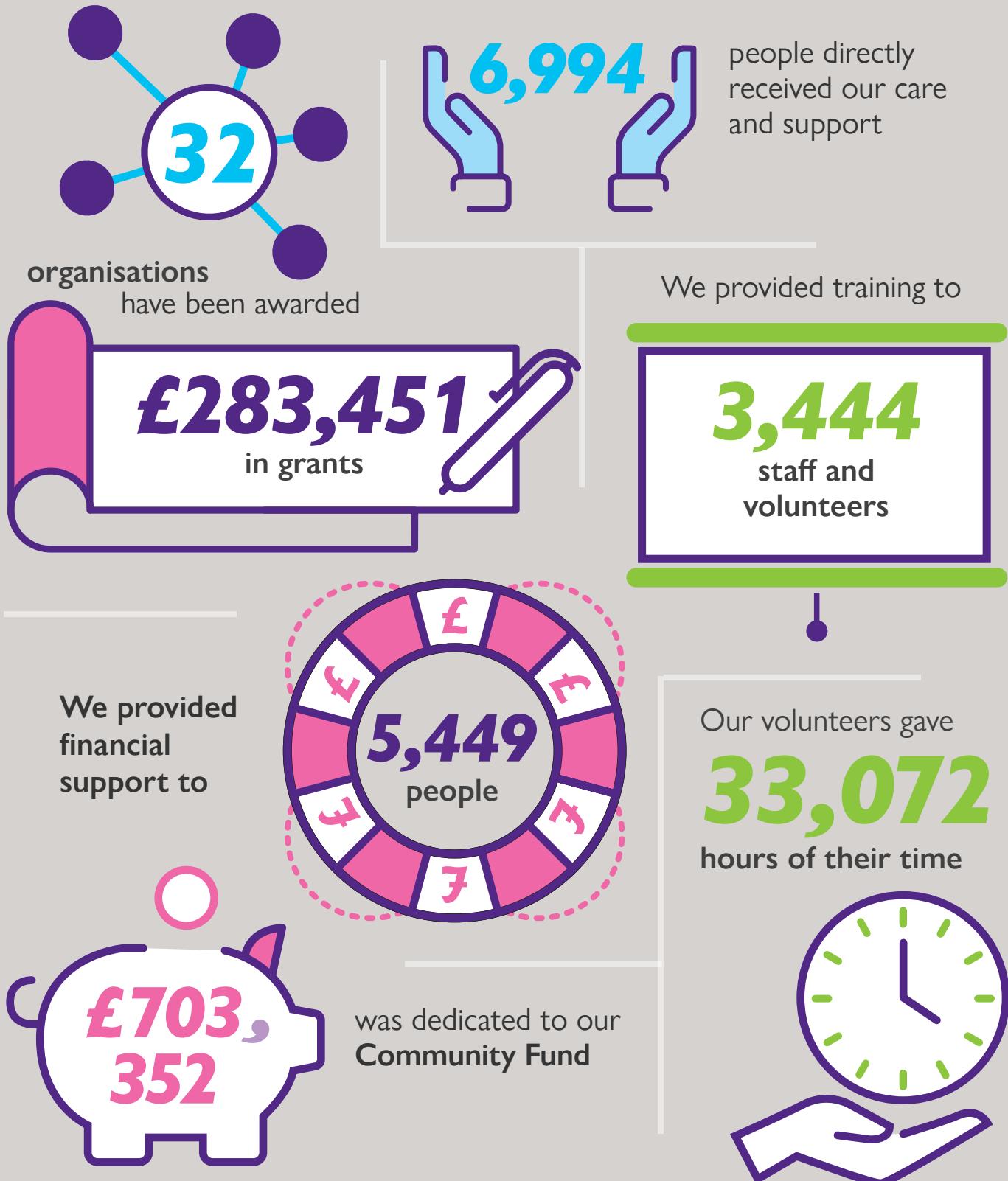
**95%**  
Portering service at our villages and care homes

**86%**  
Gardening service at our villages and care homes

**77%**  
Catering service in our retirement villages

**75%**  
Maintenance service at our villages and care homes.

## Social Impact Highlights from across the Trust 2018



This is what we've all achieved together – **thank you!**



**1,659**

members of  
staff employed



**433**

people in need awarded  
**gifts and grants** by the  
Community Fund



attendances at  
**Community  
Development  
activities and  
events**

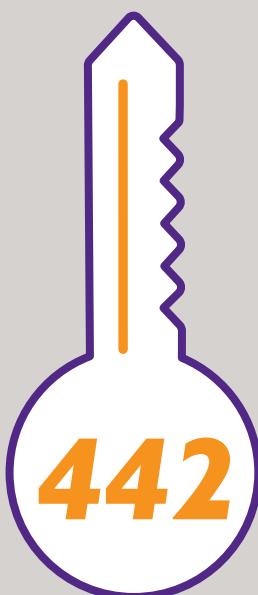
Colleagues paid  
at least

**5%**

above the  
**National Living  
Wage**

Colleagues  
contribute  
**£24**  
million

to the economies  
of Bristol and the  
surrounding area every year



**442**

admissions to  
John Wills House  
Short Term Care Unit  
(40 beds)



**9.4%**

reduction in our  
**carbon footprint**



**3,603**

people benefited from  
well-being initiatives  
receiving funding from  
our **organisational  
giving scheme**

## Customers

Building supportive and enriching communities

## Vibrant Communities



The Chocolate Quarter Resident,  
Angela Geoffrey – Volunteer reader  
at Somerdale ET Primary Academy

### Case study

In April 2018, a Volunteer Projects Coordinator was appointed by the Trust. This was to support residents to access volunteering opportunities in the wider community with partner organisations. During the first six months of project work at The Chocolate

Quarter, more than 50 residents engaged with the coordinator to discuss volunteering. Nine residents signed up to new volunteering roles, while others expressed an interest for the coordinator to seek out opportunities which were suited to them.

A weekly Signpost Surgery proved popular with residents to drop in, keep abreast of volunteering opportunities and receive support with application

and volunteer processes. A partnership was created with RSVP West (Retired Senior Volunteer Programme) to support residents to go in to their schools for a reading project. Links were formed with the Head of Somerdale School and ten residents made applications to become RSVP volunteers there. Due to the overwhelming interest from residents, the Volunteer Projects Coordinator has now formed similar partnerships with two further schools. □

## Impact

**86%**  
rated the volunteer programme as good or excellent

(retirement community residents survey 2018)

**Activity, social connections, diverse experiences and learning, contribute many benefits to our health and well-being as we age. However, UK studies have found that the older people become, the less likely they are to be active and to keep learning.**

Living within a vibrant community can make all the difference to people by providing motivation, desirable opportunities and variety. We use research evidence and continuous feedback from our residents and customers, so that our communities can continuously develop and give the best experience of ageing.

Music and intergenerational activities, for example, feature strongly. They are always valued and provide multiple benefits, with a strong evidence base showing activities can help older people connect, both with their life experiences and other people, be more stimulated and increase health and well-being (e.g. Dolan and Testoni, 2016<sup>1</sup>).

We continuously work with our residents, participants and customers to learn what is important to them and the ways in which their lives can be enhanced. Social contact, having a sense of purpose, feeling useful, being involved, having interesting and meaningful things to do are always salient factors, and have been identified in research as being very important for well-being. They were encompassed in the New Economics Foundation's extensively used 'Five Ways to Well-being' (NEF, 2008<sup>2</sup>), a set of evidence-based actions to improve and maximise well-being in the UK: (i) Connect, (ii) Be Active, (iii) Take Notice, (iv) Keep Learning, and (v) Give.

Each and every one of our five retirement villages across Bristol and North Somerset provides a range of enhanced well-being services for our residents. These include: our pastoral care team; volunteer projects coordinator; dementia specialists; activity coordinators; pottery and art tutors; a volunteering service; music therapy; exercise classes and IT support.

We actively promote, encourage and facilitate the concepts of healthy, active and meaningful ageing. A full programme of diverse regular activities, special projects and events are run each year, which encourage physical activity and social interaction, as this can bring so many health and well-being benefits. As well as promoting a sense of belonging, our communities successfully attract and welcome many visitors from the wider community, which adds to the vitality and diversity of life in our retirement villages and care homes. □

“

Since my wife died...  
I have become more isolated, but greatly enjoy a weekly visit from a volunteer and hope that this will continue.”

Sandford Station resident

“

The facilities are great, and residents are able to use the lovely swimming pool on a regular basis - something my father makes the most of.”

Relative of Charterhouse resident

The activities provided and facilitated at our villages and homes are frequently cited as one of the things that makes people glad to live at the St Monica Trust:

“ The activities programme is far more extensive than I had expected – something for everyone. It provides a very good opportunity for socialising ...”  
*The Chocolate Quarter resident*

“ Opportunity to meet new people at clubs and coffee mornings. Easy exercising on cricket ground circuit.”  
*Westbury Fields resident*

“ The activities are hugely enjoyed and we are very grateful for all of them, particularly 'Singing for the Brain'.”  
*John Wills House relative*

“ I enjoyed the visits from the nursery children watching the sports day.”  
*Garden House relative*

“ Great variety.”  
*Sandford Station resident*

“ I am constantly reassured of my mother's care by personal engagement from both the nursing and care staff and in particular the entertainment team!”  
*Russets relative*

“ We think the range and variety of activities available are excellent and the willingness to act on suggestions.”  
*Monica Wills House resident*

<sup>1</sup> <https://whatworkswellbeing.org/product/supporting-analysis-music-singing-and-wellbeing/>

<sup>2</sup> Five Ways to Wellbeing: The Postcards (NEF, 2008) <https://neweconomics.org/2008/10/five-ways-to-wellbeing-the-postcards>

## Customers

### Impact

**318**  
people volunteered  
with the Trust

**Volunteer Visiting  
Schemes supported**  
**198** village  
residents  
and isolated people

**Volunteers dedicated**  
2 hours a week of their  
time contributing  
**33,072**  
hours over 12 months

Based on the Trust's  
**Living Wage of £8.23**  
this equates to a  
financial contribution of  
**£272,183**



We do not use volunteers to substitute paid staff roles – all our volunteer roles have a clear focus on engaging directly with older people in order to enhance well-being, interaction opportunities and enhance the sense of community. To say 'thank you' for their enormous contribution to the Trust, record numbers of residents, beneficiaries and volunteers were invited to a series of special events during the year, which included a fish and chip supper at Monica Wills House and a pizza and prosecco evening at The Chocolate Quarter. □

#### Our Volunteers

The St Monica Trust has been running a volunteering programme for many years. This offers fun, enjoyable ways for our residents and customers to have regular contact with volunteers, developing long-term meaningful relationships and at the same time sharing their knowledge, experience, and interests.

The Trust now works with over 300 volunteers each year and we recognise the immense benefits that they bring to our retirement villages and older people across Bristol and the surrounding area. In return for their time, the Trust gives our volunteers the opportunity to extend their skills in a different environment, encounter new situations and to enrich their own life experience. Volunteering provides a positive sense of well-being for both the beneficiary and the volunteer. They often learn a lot from each other, enjoy reciprocal and rewarding relationships, and benefit from new perspectives and experiences.

#### Findings of our Volunteers' Survey:

**Q** "I feel well supported in my volunteer role."  
**87% agreed**

**Q** "My volunteer contribution is recognised and valued by the people I volunteer with."  
**93% agreed**

**Q** "I would recommend volunteering at the Trust to a friend or family member." **97% agreed**

**Q** "I feel I am part of the St Monica Trust." **92% agreed** (volunteering in our retirement villages).  
**97% agreed** (volunteers in our community development projects).

“

It's a good idea to have someone to come and chat to you, especially when you can't get out much... My volunteer friend is another person in my life... we will have lunch together... I didn't know what to expect, but she has turned out to be a good friend.”

## Customers

Building supportive and enriching communities

## Community Integration



### Case study

A comedy gig at a retirement village? You must be joking! Yet that's exactly what happened at B Block Pizzeria recently.

Located in the Trust's Chocolate Quarter retirement village, one hundred and twenty guests of all ages enjoyed an amazing line-up of both comedy and food.

The sold out gig was organised by Belly Laughs founder and stand-up comedian, Mark Olver and showcased some of the

UK's top comedians, including Josh Widdicombe from Channel 4's The Last Leg. Belly Laughs is a series of comedy gigs that are held every January in restaurants and cafes around Bristol to raise money for the Julian Trust, which supports rough sleepers.

Mark Olver said: "The idea behind Belly Laughs is to do comedy nights in venues that wouldn't normally host events and I loved the idea of doing a gig in a retirement village. The Trust was really enthusiastic about getting B Block involved and, seeing how they transformed the venue for the night, I couldn't believe how perfect it was – it felt just like a comedy club." □



From left to right: St Monica Trust's, Adrian Kirikmaa with Belly Laughs Founder, Mark Olver

## Customers

A recurrent theme from feedback and consultation with older people relates to their desire for access to places where people can meet and socialise. This is for activities or to spend time with others, as well as opportunities to have shared experiences around new or existing interests.

Remaining integrated with the wider community is an important aspect of active and healthy ageing. The Age-Friendly Housing Checklist in the World Health Organisation's Age Friendly Cities Guide (WHO, 2007) recommends that older people's housing "be integrated in the surrounding community and facilitate continued integration of older people into the community". Community spaces which successfully welcome and attract members of the public into a retirement village provide a wider variety of facilities and meeting places. These offer additional social interaction possibilities, opportunities to encounter different kinds of people and ongoing contact with the 'real world'. They can also provide great appeal



for residents' own families and friends, of whom many residents report they see more often after having moved to a retirement village, than they did before.

There is much more evidence and awareness of the value of attracting youngsters and offering opportunities that bring older and younger people together. Benefits range from improving health and well-being, mood and loneliness, to nurturing understanding, respect and positive attitudes towards each other (e.g. United for All Ages The Mixing Matters report, 2018).

The St Monica Trust has a long history of opening up its sites and events to local communities and the public. Recently the Trust has become a much more outward facing organisation than ever before, culminating in its participation in the ground-breaking Channel 4 programme, Old People's Home for 4 Year Olds.

Our residents, villages and homes are finding new ways for wider integration,

and our newest development, The Chocolate Quarter has community integration as the central feature of its design. Our activity programmes are including even more collaborations with local organisations, such as schools, nurseries, universities, faith groups, art organisations, community groups and local charities.

Moreover, we are increasingly looking for ways to support our residents to continue contributing to wider communities and society. In 2018 the Trust appointed its first-ever Resident Community Navigator to work with our residents to explore, source and take up appropriate external volunteering opportunities tailored to their interests and preferences.

### The Chocolate Quarter

This concept of creating vibrant, connected retirement villages with strong community and intergenerational links, was personified in the development of The Chocolate Quarter

## Impact

**91%**  
*of village residents  
agreed with  
'I engage with  
people from  
outside of the  
village as much  
as I want to'*

## Residents survey

in Keynsham. Where traditional models of care have led to society hiding away older people and the issues associated with ageing behind gated communities, The Chocolate Quarter is about breaking down the walls that stop older people being valued and promoting mutually beneficial relationships with the wider community. To achieve this, we combined retirement living with a range of facilities which are open to the public and encourage community integration between all age groups. The Chocolate Quarter also includes, uniquely, office space for local businesses, such as Pukka Herbs, IVC Group International and St Augustine's Surgery and has gained national interest since it officially opened in April 2018.

Retirement villages can be a catalyst for the wider community, bringing people together, sharing experiences and developing relationships to add vibrancy to the area. This has been the case in The Chocolate Quarter's relationship with the wider Somerdale housing development. In the last twelve months B Block has sponsored the newly relaunched Keynsham 10k, hosted a charity comedy gig and its regular cinema nights continue to sell out. Whilst within the retirement village, the restaurant, bistro, swimming pool, spa, gym, sanctuary, art and pottery studio, resident-run shop, barbers and hairdressers provide a welcoming community for visitors, office staff from the nearby businesses and people living in the surrounding area. □

“

*I hadn't realised that somebody in their eighties is just like me, but with more years of experience.”*

**Young intergenerational initiative participant**

### Findings from The Chocolate Quarter's Residents Survey 2018

Ratings and comments show residents were pleased with the ambience of The Chocolate Quarter, the intergenerational atmosphere and the quality and range of facilities that were used by people of all ages.

The most frequently positive comment showed appreciation of the life brought to The Chocolate Quarter by seeing people of all ages: “It makes me feel part of a wider community not just an old people's enclave”.

Most people 'agreed' or 'strongly agreed' with "**I have a pleasant living environment**" (99%), "**I feel safe**" (97%), "**I engage with people from outside TCQ**" (94%), "**I would recommend living here to my friends**" (92%), "**I find having community spaces open to both the public and residents enhances living at TCQ**" (75%). The public community spaces were commonly cited as things that made people glad they live at TCQ.

### Examples of responses

“

Mixture of ages, residents rather than 'old peoples home'. Life goes on around us.”

“

The overall environment and connections to the community.”

“

Everything, I am very content.”

“

That we share facilities with the community.”

“

The best thing I ever did was to move here.”

“

Very stimulating environment to live in.”

“

I don't think I could find anything better and finally I feel integrated and involved.”

“

The secure environment for living in one's own home, yet at the same time, not being cut off from the outside world... The proximity of the doctors surgery.”

## Growth

Increasing the impact on well-being of older people in and around Bristol

## Partnering Organisations



### Case study

Wesley caught the bus to The Chocolate Quarter today. Like any other eighteen-year-old, independence is very important

to him. Part of the Bristol Bears Community Foundation, Wesley is completing a six week work placement at B Block today. Throughout his placement, Wesley didn't want to be picked up and taken to work. In fact, as his fellow Bears drove down Somerdale Road in their minibus, they passed

Wesley walking along the pavement with his headphones on. Just like any of the other young people on their way to work at The Chocolate Quarter this morning.

Wesley has special education needs, but he's determined not to be shackled by his limitations. They are just barriers to overcome. Just as Travel Training enabled Wesley to travel independently, his work placement at B Block is helping him fulfil his life-long aspirations for when he leaves school. Wesley wants to live independently and hold down a full or part-time job. At B Block he is developing the life skills that will help him do that, as well as practical things, like learning about table service, bar work, stocktaking and teamwork. Wesley and his fellow Bears want to be just like any other young adult and being able to access work and access the world, means that they can achieve that.

The Bristol Bears Community Foundation delivers a broad range of programmes across four key areas: education, participation, health and inclusion. Spectrum Programme Manager, Kris Tavender runs a number of programmes across the Trust's five retirement villages: "We're genuinely bowled over by how well we've been received at the Trust and the way the partnership has developed over the last eighteen months.

"The heart of the St Monica Trust is based around the individual and you notice it as soon as you enter The Chocolate Quarter. We always get such a warm welcome from the staff, everyone knows our names and the kids are so happy and comfortable here. It's the most valuable partnership we've had in the four years that the programme has been running." □

**The St Monica Trust is committed to improving the quality of life for as many people as we can, influencing positive attitudes to ageing and contributing to excellence in our field.**

One of the ways we do this, is through working together with well over a thousand local, national and international partners and organisations. Partnering happens at all levels – in practice on the ground, through research and development, and strategically. Our partnering organisations range from local councils, GPs, the NHS, universities, local charities, networking groups, MPs, hospices, schools, nurseries, churches, assistive technology developers, through to other care, health, hospitality and housing providers.

**Impact of partnering:**

- Generating mutual benefits through sharing knowledge, expertise, ideas, initiatives, services, costs and resources.
- Being able to achieve more together than singularly, e.g. efficiencies of scale, types of contributions and expanding the reach of benefits.
- The Trust offering resources, knowledge, and expertise directly for the support of other organisations, which can enable positive impact on more people and provide enhanced benefits for communities and society.

We are always looking for new ways to extend our giving and the Trust is proud to be part of a new initiative called The Bristol Older People's Funding Alliance. This is a new partnership made up of the St Monica Trust, Quartet Community Foundation, The Anchor Society, John James Bristol Foundation, The Dolphin Society, The Grateful Society, the Society of Merchant Venturers and Bristol Ageing Better.

In 2018, the Alliance gave away £85,000 and in its second funding tranche this has been increased to £150,000. They will award transformation grants of up to £15,000 to organisations that deliver vital services to older people in the local area, such as those

that tackle loneliness and isolation. The Alliance creates partnerships, rather than organisations working in competition with each other, so that funding can have more impact and help smaller organisations to become more sustainable.

The Trust is currently involved in more than 40 collaborations with universities, research bodies and steering groups, covering issues such as assistive technology, intergenerational activity and dementia.

In the culmination of a world-leading research project, residents at the Trust's Cote Lane retirement village took part in a demonstration to see how driverless vehicles could make a difference to their everyday lives. The demonstration saw participants experience a journey in an Aurrigo Pod Zero, a first production line model of connected and autonomous vehicles (CAVs). The £5.5m project, known as 'Flourish,' is run by a multi-sector consortium of organisations including the University of the West of England (UWE Bristol) and is the only Innovate UK funded project focused on older people. The project launched in 2016 with an aim to develop a driverless vehicle that integrates the mobility needs of older people with a secure and connected infrastructure. The introduction of CAVs could revolutionise mobility for older people, reducing loneliness and helping them to maintain a healthy level of independence.

The Trust also contributed to a number of government white papers, including the All Party Parliamentary Group on Social Integration's interim report, *Healing the Generational Divide*. And the Trust was named as one of the consortium of educational partners in Weston College's successful application to become one of the government's first Institutes of Technology. The Trust's Research and Development team also produced a free Guide to Intergenerational Activity for Older People, which was available in print and as a downloadable PDF available from the St Monica Trust website.

**Active Aging Bristol (AAB)**

We host Active Ageing Bristol, which is a collaboration between the St Monica Trust,

**Impact of Active Ageing Bristol**

**£207,292**

*Total amount of funding secured by Active Ageing Bristol since 2017*

**4400+ walkers**  
*participated in Bristol Walk Fest 2018*  
**(190% increase on 2017)**

The Anchor Society and Bristol Sport Foundation. Its aim is to enable more older people to get involved in physical activity more often, and to enjoy improved physical health and mental well-being. □

“

*We visited places I didn't even know existed and learnt so much about the area, plant life and animal life. It has inspired me to further explore the wonderful areas that are in and around Bristol.”*

**Bristol Walk Fest 2018 participant**

## Growth

Increasing the impact on well-being of older people in and around Bristol

## Community Impact Team



### Case study

With no local family or friends and feeling detached from his neighbours and community, Jeffrey wanted some help to build his confidence to “get out and about and enjoy life”. Anne was keen to volunteer with older people after a lifetime of working with children and “wanted to give my time and energy to someone who would benefit”.

Run by the St Monica Trust’s Community Impact Team, the ACE Neighbours

project arranged for Anne to visit Jeffrey for a period of six months. Jeffrey said: “I needed a buddy – someone who I could go out and meet for a coffee. Before Anne started visiting me, I wasn’t active. At Anne’s first visit we talked about anything and everything and completely felt at ease in each other’s company”.

Over the six months that Anne visited Jeffrey, he has joined a cookery course and a gardening group. Jeffrey has also started attending a local coffee morning, which is a significant step for him as he went along to it for the first time

without Anne – something which a few months ago Jeffrey wouldn’t have had the confidence to do.

Although Anne’s six month period of support has come to an end, Anne and Jeffrey’s friendship continues and they are looking forward to an upcoming cinema trip. Jeffrey summed up his experience of ACE Neighbours:

“My confidence had been knocked and I thought this might help bring it back. And it has come back – a lot! It’s been a good experience and I’ve enjoyed it. Now I’m ready to move onto the next chapter in my life”. □

## Impact

**Our Community Impact Team works with organisations, community groups and individuals to improve the quality of life for older people across the region. The team is made up of two existing projects: the Community Fund, which provides gifts and grants to individuals and organisations who support older people; and Community Development, which works in partnership with older people to improve their local area and make connections.**

As well as creating a vibrant community for our residents across our villages, the St Monica Trust has always been committed to improving the lives of all older people across Bristol and the surrounding area. We have done this by giving financial support to individuals and organisations, and more recently through community projects such as LinkAge, ACE and Active Ageing Bristol.

For example, after running an intergenerational choir taster session, funding was successfully secured to establish the choir at the Trust's Monica Wills House retirement village in Bedminster. The choir now includes mums, babies, residents and older people from the wider community, who meet every Tuesday to sing and socialise. Research studies show that community choirs have many beneficial impacts on their singers, including improvements in health, happiness, memory function, brain stimulation and the rapid development of social bonds.

With funding from Bristol Ageing Better since 2017, and in partnership with Southern Links Children Centre, we have been running community development activities in Stockwood. These include the development of the 'Greater Stockwood Group', a resident action group, keeping residents informed of local issues, helping community groups and initiatives, and giving a voice to local people. In May 2019 they held their first big event; a public meeting to discuss the spending of the Community Infrastructure Levy. This is money raised from developers to support infrastructure projects that help the growth of Bristol, such as schools and transport improvements.

Also in Stockwood, the Community Impact Team has established and supported an intergenerational gardening project called 'Stockwood growing together' that is on its way to becoming sustainable and independent. The group have also initiated their own projects, such as cooking workshops using the food grown on the allotment.

### The ACE Neighbours Project

The ACE Neighbours project is run by the St Monica Trust's Community Impact Team and aims to reduce loneliness and isolation in older people. 2018 saw the delivery of the ACE Neighbours project, initially in Hartcliffe and Withywood, which was funded by Bristol City Council for two years and then in June a launch in Keynsham. The first nine volunteers were trained in February and another group of five were trained in Keynsham in October. Seventeen referrals have been made, from a variety of sources including GP surgeries, community navigators

**Community Impact Team activities impacted 809 individuals with 9,383 overall attendances at 31 different recurring activities along with 15 one-off events held by 706 individuals**

**1,300 people engaged by our Community Impact Teams**

and from the very people seeking support themselves. Of these referrals nine met the criteria and were keen to be supported by a volunteer to help improve their connections with their community and their physical and mental health.

Three of the six-month matches have been completed, with regular activities such as walking, swimming, coffee mornings, a gardening group and regular use of community transport being a few examples of the outcome of these matches.

The baseline and six-month measurements were conducted and the University of Birmingham will be analysing the data and providing an evaluation in 2019. A strong network within the communities we serve has been established and a strong partnership with the University of Birmingham has been formed and maintained. □

“

*The project has made a tremendous difference. I was isolated before and never saw anybody.”*

**ACE project participant**

## Growth

Increasing the impact on well-being of older people in and around Bristol

## Community Fund



### Case study

Our Community Fund Team gave a grant to the West of England Rural Network to deliver Rural Links, which provides a range of activities and events for rural communities in North East Somerset.

Following the death of her husband, Margaret was diagnosed with Parkinson's disease. This devastating series of events hit Margaret and her family hard, with the prospect of years of declining health and uncertainty. At first Margaret withdrew from society, needing time to grieve, but being stuck at home without transport, her isolation soon became more pronounced. It was at this point

that Margaret contacted Rural Links and asked them to help her attend their Wellness Wednesdays sessions.

Since August 2018, Margaret has been brought along by new volunteer driver, Jen. Margaret's live-in carer, Aire comes too and they both appreciate the time away from home. They play scrabble and, if she is able, Margaret often sits in on the afternoon workshops. Margaret also comes along to the monthly Chew Valley Parkinson's group, which Rural Links helped to establish. Far from discussing their condition, the group share a lot of laughter and find great comfort in the support of their peers. Margaret says, "It's lovely to be out and about meeting new people, watching the seasons change and just seeing the outside world again". □

Rural Links  
first 8 months  
key impacts  
May-Dec 2018

**193**  
*participants from  
33 different  
villages and towns*

**1,935**  
*attendances  
at events and activities*

**Achieved success  
in promoting mental  
health and physical  
well-being without  
having to use those labels**

### Feedback from clients

“ This project has made a very important change in my life and I love it.”

“ It helps me to become more aware of an ongoing future rather than a survival road to a terminus.”

“ It is here that true friendships are made.”

“ I find the meetings very enjoyable and meet a lot of friendly people.”

**Our Community Fund helps fund solutions to the issues that affect the lives of older people in Bristol and the surrounding area. As well as creating a vibrant community for our residents across our villages, the St Monica Trust has always been committed to improving the lives of all older people across the region.**

We have done this by giving financial support to individuals and organisations and see ourselves as more than just a funder. We don't just give out money, we build relationships with organisations and often introduce them to other partners and funders in the city.

The Community Fund currently distributes £640,000 each year to individuals, families and organisations across the region. We provide gifts and grants that go directly to those who will benefit the most. Our aim is to help people to live independently in their own community for as long as possible.

### Projects receiving funding in 2018

Community Web BS3 Community Development	Monthly lunch club and day trips Begbrook Retirement Club	Bristol Older People's Funding Alliance Transformation Fund:
Lunch Club Chew Valley Monday Club	Visually impaired steering group to produce a piece for theatre Part Exchange Co	Age UK Bristol WE Care & Repair
Feasibility Study for intergenerational initiative Children's Scrapstore	Contemporary Seniors Dance Class 3rd Stage Dance Company	Bristol After Stroke Bristol Drugs Project
Silver Sunday Advice Day Community Connect	Watersports for over 55s Young Bristol	Bristol Older People's Forum Quartet Community Foundation
Equipment Fare Short Mat Bowls Club	Intergenerational Art Workshop Blaise Weston Court	North Somerset Older People's Fund: Alive Activities
Good Conversations Project Keynsham Action Network	Residents Advice Worker Bristol CAB	Nailsea Social Shredders NS Accordion Club
Initiative to encourage sport related activities Active Ageing Bristol	Wellbeing Arts Project Southmead Community Development Trust	Our Way Our Say Portishead Dementia Action Alliance
Get To Know Keynsham Day Age UK BANES	Cookery Club Square Food Foundation	SSAFA (Soldiers, Sailors, Airmen and Families Association)
Later Life Matters Age UK and CAB South Glos	Project Manager Trinity Care Service	Vision North Somerset
Age Friendly Challenge Bristol Ageing Better	Rural Links Project West of England Rural Network	WERN (West of England Rural Network)

## Community Fund impact

**£298,046**  
*of funding donated to  
32 organisations*

**The Trust is now the largest grant funder for older people in Bristol**

At least

**6,270**  
*people reached in the  
Bristol, South Glos,  
BANES and North  
Somerset areas*

**23**  
**Organisations**  
*visited to promote  
the work of the  
Community Fund*

# Growth

## Individual Giving

The Community Fund also provides funding and support for individuals in need living in Bristol and the surrounding area. It makes a difference through awarding short-term grants and financial gifts to people aged 40-years-old and above, who have a physical health problem or disability, and are living on a small income.

In 2018, the **Community Fund helped 433 individuals** living in Bristol, South Gloucestershire, Weston-super-Mare, North Somerset, Bath and North East Somerset (75% were 40-60 years old, 25% were 61-95 years old).

It provided **£86,505 for 176 short-term grants** (monthly payments for up to six months). Around half were to cover unreceived or withdrawn benefits. The rest contributed to costs of health related items, bills or debts, or the extra costs of moving into a new home.

A total of **£134,835 was awarded for 326 gifts** (one off payments for particular items). Around 70% of gifts were to buy appliances, flooring or furniture; the rest were for bills or debts, house repairs, disability-related equipment, bedding, clothes, computers, heating, adaptations or education. □

## Findings from an evaluation postal survey of 2018 beneficiaries

Comments from respondents commonly mentioned “less stress” “better food” “less isolation” “improved self-respect” and “feel cared about”:

“ I am so grateful for your gift of carpet. It may just only be carpet but to me it is so much more. It has made such a difference to me. I have now started to feel pride in myself and love showing others what a difference it has made to my room. It makes the room look homely so thank you from the bottom of my heart.”

*Gift recipient*

“ It helped with bills and food. I felt I could hold my head up and not be weighed down with the struggle of not being able to afford things.”

*Short term grant recipient*

“ I sleep better plus it makes me feel more valued. More able.”

*Gift (mattress) recipient*

“ My old cooker would often trip the electric supply fuse. Two of the four cooking rings weren’t working and the oven seal was broken causing the oven to excessively smoke. The settee had tears, lumps and was badly worn. I can cook more healthy meals with greater ease, can relax on settee which helps my health condition.”

*Gift recipient*

“ It makes me feel that I have a friend like you, who is a reliable and honest organisation.”

*Gift recipient*

“ I didn’t have to worry about money for the bus for a long time which was important to me for my health appointments. The phone credit is important because I can call people when I need to. Both help me feel less isolated.”

*Short-term grant recipient*

## Findings from 2018 beneficiaries who responded to our Individual Giving feedback survey

### What difference did it make for you?

- Relieved bill and money worries
- Helped with sleep, pain, food, warmth and comfort

### Had a positive effect on:

- My life (94% of 105 respondents)
- How supported I feel (93% of 100 respondents)
- How I feel (90% of 89 respondents)
- My ability to manage my day-to-day life (80% of 87 respondents)
- The amount of stress or worry I feel (80% of 86 respondents)

## Changes that happened because of funding received

	Respondents
Relief from depression/anxiety	72
Feeling in control of life	47
Higher confidence levels	40
Improved overall health	40
Relief from being heavily burdened with debt	37
Free from debt	26
Financial comfort	24
Able to obtain advice locally	21
Able to save regularly	13
Access to internet	2

## Colleagues

Continue to make people's jobs more satisfying through employee benefits, training and empowerment

## Employee Benefits



“

*I get a real feeling of fulfilment and achievement, helping people maintain their independence to increase their quality of life.”*

and pressure ulcer care, undertaking all the home audits on a monthly basis and preparing action plans. The Trust has also sponsored Natalie to return to university to undertake a course to mentor student nurses and she is currently studying Physical Assessment and Clinical Reasoning at UWE.

Natalie said: “I decided that I didn’t want to work in a hospital as I felt I could achieve more as a nurse in the adult social care sector. If you want to do nursing because you want to help someone then social care is the best opportunity to do so. It involves every aspect of that person’s life, creating a holistic approach, which gives me a feeling of fulfilment knowing you’ve helped someone in every way possible.

“Working as a registered nurse in adult social care gives you the time to focus on all aspects of the individual and not just their health problems. You get the chance to build relationships with the residents and their families, making the care more personal and patient centred. I get a real feeling of fulfilment and achievement, helping people maintain their independence to increase their quality of life and knowing that I’ve done all I can on that shift.” □

### Case study

Natalie's first introduction to the Trust was on a placement at our John Wills House nursing care home while studying for her nursing degree at the University

of the West of England (UWE). Our residents and staff must have made quite an impression on Natalie because she stayed on as a bank carer until she completed her university studies.

Since then she has completed a preceptorship at John Wills House and she is now the resource nurse for wound

## Colleagues

We constantly strive to apply our values in everything we do. We describe the St Monica Trust as 'A Great Place to Work' and endeavour to deliver all the elements to colleagues, which make work rewarding, challenging and fun. Staff well-being is central and this work focuses on the physical, financial and emotional aspects.

## Impact

Raising the minimum wage has been linked to a range of positive outcomes for people living on low incomes including increased feelings of well-being, decreased unmet medical needs, decreased suicide rates, and increased likelihood of graduating from high school.

(e.g. Gertner et al., 2019)

### Examples of services, support and benefits:

The Trust's **Colleague Engagement Manager** was appointed to engage with employees to promote a greater sense of well-being and commitment to the organisation's goals and values. (ACAS, 2014<sup>1</sup>).

**Well-being Weeks** are held twice a year offering a host of activities, such as yoga, chiropractic therapy, mindfulness, and managing money workshops.

A dedicated bespoke **St Monica Trust Well-Being website**.

'Great Place to Work' and **Colleague Engagement** strategies launched.

An agreed **Action Plan with Time to Change** (a social movement led by Mind and Rethink Mental Illness changing the way people think and act about mental health problems).

Our **ROSE Awards for staff** which recognise their special endeavours, nominations come from residents, customers, family members and colleagues.

A free **Employee Assistance Programme** giving staff 24/7 access to a range of confidential health and well-being services.

**Free flu vaccinations.**

**Free fruit** in staff rooms and shared kitchens.

Advice from our on-site **fitness instructors** to guide staff in meeting their fitness goals.

**Gym and swimming pool discounts.**

Support and engagement from our **Pastoral Care Team**.

Annual **Family Fun Day** for all colleagues and volunteers and their families. 2018's Fun Day took place at the Wild Place Project in Bristol.

A variety of **bespoke events** organised at our villages designed for everyone to take part in, such as festivals, celebrations and summer BBQs.

**Good News stories** run via the 'Our Trust Hub' and posters.

**Complementary tickets** for sports events and cinemas.

### We offer many benefits including:

**Paying at least 5% above National Living Wage**, for all ages.

**A company pension scheme** which matches employee contributions up to 7.5%.

**Subsidised restaurants.**

**One week's additional full pay** during maternity leave.

**Access to free car parking spaces** and bike racks at all our villages.

**A Christmas bonus** and contributions towards team Christmas meal.

“

St Monica Trust is a forward-thinking innovative company working in the care sector. They look after the welfare of their staff and ensure that they follow up any concerns you may have.”

An Activities Coordinator review on [indeed.co.uk](https://www.indeed.co.uk), 2018

<sup>1</sup> [http://www.acas.org.uk/media/pdf/0/o\\_Advisory-booklet-The-People-Factor.pdf](http://www.acas.org.uk/media/pdf/0/o_Advisory-booklet-The-People-Factor.pdf)  
[https://www.ajpmonline.org/article/S0749-3797\(19\)30028-5/fulltext](https://www.ajpmonline.org/article/S0749-3797(19)30028-5/fulltext)  
Association Between State Minimum Wages and Suicide Rates in the U.S.

## Colleagues

Continue to make people's jobs more satisfying through employee benefits, training and empowerment

## Training and apprenticeships

### Case study

Chris was working on bank for the Trust when he saw an advert for a commis chef. The role was one of the Trust's apprenticeships and combined studying once a week at the School of Food, with working at B Block pizzeria at the Trust's Chocolate Quarter retirement village in Keynsham.

"I'm really passionate about cooking and I saw it as an opportunity to get back into education," says Chris. "There's so much potential for me to develop a career with the Trust and, as well as cooking pizzas in B Block, I've also been given the opportunity to prepare classic bistro dishes for Somer Dining."

The School of Food is the brainchild of the St Monica Trust's Catering Development Manager, Adrian Kirikmaa and Michelin star chef, Josh Eggleton. Together they joined forces with Weston College, St Katherine's School, the St Monica Trust and Ashton Gate Stadium to create a vocational programme for chefs from all across the South West.

The programme is open to young people like Chris, who are 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 visits to food producers, artisans and the opportunity to cook at high profile events and locations.

"I'm really happy to be part of the School of Food," says Chris. "There's so many top chefs involved from across the Bristol food scene and learning from the very best is a great opportunity for me."



During his twelve months at B Block, Chris has created two pizzas which have proved very popular with customers. "The Trust have been so supportive throughout my apprenticeship and always makes me feel like I've got the space to create dishes, as well as cooking for B Block's customers. If I have an idea, I can go to the head chef and say 'I'd like to make this and can we make it happen?'"

Chris wants to stay in education when he completes his School of Food apprenticeship and hopes to become a Chef de Partie. "I get such a buzz from creating delicious food. When you cook a dish and someone tells you that they really enjoyed it – it's a great feeling. That's why I love my job and I want to stay working for the St Monica Trust for many years to come." □

## Colleagues

### Impact

Training Team ran  
**423**  
training courses  
**91**  
different types of  
course, attended by  
**3,300**  
employees,  
bank workers and  
volunteers and  
**144**  
external staff

**89%**  
care home residents  
agree 'My carers  
have the skills to  
meet my needs'

We value our people and our apprenticeship initiative supports staff across the Trust to achieve higher level qualifications through sponsorship. This benefits both their Continuing Professional Development (CPD) and our residents, through their new found knowledge and key skills which can be implemented within the workplace.

In 2018 we had 27 live learners across the Trust. 92% of our learners work within a Health and Social Care related role and 12 were undertaking the Lead Adult Care Worker Level 3 Apprenticeship, and 6 the Adult Care Worker Level 2 Apprenticeship.

A new Work Placement Coordinator role was created this year. This encompasses our internal apprenticeships and work experience placements, and provides support and pastoral care towards the trainee nursing associate process, as well as sourcing partnership opportunities with local schools and colleges. Three training providers were also appointed to support our apprentices across the Trust. □

Feedback from St Monica Trust colleagues:

“

*Very informative and useful to refresh my knowledge of my job role.”*

“

*Good course and understanding about our service users.”*

“

*Really enjoyed, updated my knowledge and gave me confidence in administration of first aid.”*



## Colleagues

Continue to make people's jobs more satisfying through employee benefits, training and empowerment

## Empowerment



### Case study

When a local foodbank sent out an urgent appeal, staff at John Wills House were quick to rally round. Not only did they empty out their food cupboards at home, but they also donated money which was then used to buy more food for the foodbank.

However, this was only the start. After hearing about what the John Wills House team had done, Food Development Manager, Adrian Kirikmaa and Clinical Governance Lead, Heather Kirton got their

heads together with John Wills House Care Home Manager, Wendy Leaman over a cup of coffee and asked one, simple question: "What else can we do?"

What they came up with was the idea of establishing a community fridge for staff at John Wills House. "There's always a certain amount of uneaten food at the end of lunch service," explained Wendy. "The idea we had was to package up a complete meal in a plastic container with a label on it and put it in the staff room fridge for people to buy."

Simply by re-selling something that would otherwise be thrown away, the community fridges raise an average of

£12 per week, which is then used to buy donations for the North Bristol Foodbank. Westbury Fields colleagues have also established their own community fridge, christened 'Freda', at Sommerville and there are plans to establish more community fridges at all of the Trust's retirement villages.

"I think this is one of the best things we've ever done at John Wills House. From Head Chef, Lisa Cole and her team that made this a reality, to Helen Cartledge's housekeeping team who clear out the fridge each night and Jane Reynolds who delivers the food to the foodbank – this has been a big team effort." □

## Colleagues



**Empowering employees is about giving them more scope to have more autonomy and responsibility for problem solving and decision-making in their daily work. Supporting staff to be more empowered creates a better workplace culture and a better experience for them and our customers.**

Research shows that empowered employees are more likely to enjoy their work, be more productive, go the extra mile, follow best practices, be more productive, have good communication, embrace change, have “can do” attitudes, and be more committed (Lee et al., 2018<sup>1</sup>; The Saylor Foundation, 2013<sup>2</sup>; Billikopf, 2001<sup>3</sup>).

Allowing employees to use their own initiative was found to be a significant factor in enabling them to be the most productive in their jobs in a survey of more than 2,000 UK employees conducted by the Chartered Institute of Personnel and Development (CIPD, 2015<sup>4</sup>). Staff being able to use more of their own initiative can stimulate change, contribute to continuous improvement and lead to them being more responsive and resilient.

The Trust strives for its staff to feel empowered, encouraged to take the initiative, think outside the box, work in partnership with others, and create their own learning opportunities. Some of the positive benefits of this were highlighted in our 2018 assessment report from Hospitality Assured which noted:

- “Training and Development involves and empowers its people to encourage innovation, improvement and creativity.”
- “The new Site Executive Team (SET) matrix leadership structure has empowered staff at our sites to work collaboratively to solve localised challenges, and helped to make them more independent in their decision-making processes.”
- “Empowerment of teams has increased their responsiveness.”

Feedback about our staff commonly reflects how caring, insightful, and person-centred they are. We are regularly impressed by how responsive, resourceful and innovative they can be. Some recent examples, include:

- One of our registered nurses arranged an exhibition of a resident's work after learning that he was an internationally-renowned artist. Her team really noticed a positive difference in the resident throughout the planning for his exhibition. His artwork is now on display in the main reception of The Chocolate Quarter.
- A deputy retirement community manager arranged a workshop on dementia for non-care staff to give them a greater awareness of how residents in a retirement village can change in their behaviour or actions. The care team went on to notice that, with small changes and understanding about people's complex conditions, colleagues are able to better

meet the needs of our residents and this activity has contributed to a feeling of calm across the village.

- Realising the importance of having a place to go and chat with friends, a Retirement Community Manager recently opened a community shed at their retirement village. This has enabled residents to work on projects, form new relationships and help them cope with downsizing from a larger home.
- A Community Engagement Coordinator developed a residents' skills base, so that residents could get to know their neighbours, form relationships and help each other out. The impact of this has been to give people a real sense of purpose. □

“

*Generous pay for work, including weekend and bank enhancement. Welcoming and kind working environment, plus approachable management. Makes you feel valued for the work you do.”*

**Review on Glassdoor.co.uk**

<sup>1</sup> <https://hbr.org/2018/03/when-empowering-employees-works-and-when-it-doesnt>

<sup>2</sup> <https://resources.saylor.org/wwwresources/archived/site/wp-content/uploads/2013/02/BUS208-5.2-The-Benefits-of-Empowering-Employees-FINAL.pdf>

<sup>3</sup> <https://nature.berkeley.edu/ucce50/ag-labor/7labor/10.htm>

<sup>4</sup> <https://www.bl.uk/collection-items/employee-outlook-autumn-2015>

## Business

We will continue to ensure sustainable financial planning

## Sustainability and responsible sourcing



### Case study

The Bio-Bee is the UK's first vehicle to both collect and run on commercial food waste and the St Monica Trust is among the very first organisations to have used the service in Bristol. The service is operated by GENeco, the renewable energy company based in Avonmouth and it is hoped that the Bio-Bee will increase food waste recycling levels in the city.

With Bristol among 40 places in the UK that consistently exceeds air quality limits for nitrogen dioxide, the Bio-Bee

demonstrates a real alternative to diesel refuse collection vehicles and heavy goods vehicles by running on clean biomethane. The Bio-Bee's total carbon footprint is around 90% lower than a diesel equivalent and it also offers a cost-effective and more sustainable way for food waste to be collected and recycled.

**The St Monica Trust's Facilities Operations Manager, Mark Thomas, said:** "The Trust is committed to reducing its impact on the environment and being more 'Careful With Resources'. GENeco collecting our commercial food waste is just one more way in which we practice what we preach, as we continue on our sustainability journey and strive to increase our positive social impact".

Food waste is collected in the Bio-Bee from two of the Trust's sites and brought back to GENeco's anaerobic digestion plant in Bristol. The waste is depackaged and is then used to produce sustainable electricity for homes and communities. The remaining food waste undergoes a pasteurisation process before being fed into the anaerobic digesters, where micro-organisms break down the waste in the absence of oxygen and produce methane-rich biogas.

This biogas is either used to produce renewable electricity or it is converted in GENeco's gas-to-grid plant to enriched biomethane, which is injected into the gas grid. At this stage it can be used as fuel in the Bio-Bee and other vehicles or to supply local homes. □

## Business

**One way of limiting our impact on the environment is to commit to reducing the Trust's energy consumption. In measuring our carbon footprint we are being true to the values of the St Monica Trust by being open and honest about our impact on the environment.**

In 2018, the St Monica Trust was awarded the "Planet Mark" in recognition of our commitment to reducing our carbon footprint. 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. **The Trust is a member of the Sustainable Restaurant Association**, which means we support initiatives such as serving more vegetables and better quality meat, promoting vegetarian options and serving fair trade products. Over the last few years, the Trust has also adopted a robust 'Careful With Resources' initiative, which everyone within the organisation can adopt to reduce our impact on the environment.

## Impact

**Replacement of lighting at Monica Wills House with energy saving bulbs reduced energy consumption by 3,000kW**

The Trust spent in the region of £120k in 2017-18 on LED lighting installations at Monica Wills House and Darlisette House. Our Monica Wills House retirement community used just 365,862kWh in 2018, a 31% drop in electricity usage, in which the LED installation played a significant part. The building was previously averaging a whopping 532,930kWh per year.

We procured 100% renewables for our non-half hourly electricity supplies from Haven supplied by Drax who've upgraded three of its coal units to use sustainable biomass, and is the biggest decarbonisation project in Europe. The bulk of the Trust's electricity is supplied by ENGIE who typically use renewables for around a third of their supplies.

As part its development, the Trust incorporated 46.16kWp of solar panels on The Chocolate Quarter roofs along with a 20kW micro Combined Heat and Power unit. This is producing almost 130,000kWh of electricity per year.

Examples of other aspects designed to make The Chocolate Quarter more sustainable were: including it on a local bus route; having an Enterprise Car Club petrol hybrid vehicle outside the door; as well as an electric vehicle charging point for staff and residents. One resident purchased a Nissan Leaf and makes use of the charging point.

Food waste is now all weighed on collection by either Olleco or GENeco and turned into biogas and soil improver in Avonmouth. GENeco collect from our sites using 'the Bio-bee', the UK's first vehicle to both collect and run on commercial food waste. The St Monica Trust, along with Boston Tea Party, were among the first organisations to use this service.

As well as this, the Trust is now composting food waste on site at the Cote Lane retirement village. Within our kitchens, the Trust has been trialling a food waste monitoring system called Chef's Eye. We are at a point where only 'offensive waste' is sent to landfill now and it is hoped that we can address that

too with the aim to achieve zero waste to landfill status within the next three years.

We have removed all food service plastics at The Chocolate Quarter retirement village and use a product called Vegware, which is plant-based compostable foodservice packaging. Our kitchens now only use fish meeting standards for sustainable fishing set by the Marine Stewardship Council (MSC). Our Clinical Governance Lead worked on ways to purchase more eco-friendly clinical products. We now routinely purchase syringes containing less plastic.

Our Gardening Team continued their hard work: composting, growing our own plants, engaging in tree conservation and expanding biodiversity plans. The use of glyphosate herbicides has completely stopped, enhancing natural habitats for birds, animals and bees. Engaging local beekeepers, the Gardening Team also introduced beehives on the Cote Lane site with the environmental benefit that brings. □

“

*They are embracing new technologies to reduce environmental impacts, engaging people in the programme while continually focusing on providing the best possible care experience.”*

**The Planet Mark™  
Founder, Steve Malkin**

# Financial Statements

**In 2018, the Trust spent £42.7m on its activities (an increase of 7.8% on the previous year). Total income was £40.4m which was in line with the previous year. This performance resulted in the Trust generating an operating deficit of £2,358k for the year, which was taken from the Trusts' financial reserves.**

This was in line with the Trust's plans to support the set-up of the services at The Chocolate Quarter in Keynsham. The operating

performance of the Trusts' established services taking into account The Chocolate Quarter start-up costs of £2,785k was a surplus of £427k.

The Trust is reliant upon the income generated from its investments to support its charitable operations. In 2018 the net investment income was £5.6m after investment costs, which was in line with the forecast and enabled the Trust to support the established care services as well as to support the first full year operations at The Chocolate Quarter.

The Trust's residential care services (care homes and retirement living) helped 1,825

individuals in 2018, of which 33%, or 604 people, were afforded financial support by the Trust. The Trust's Care at Home service also assisted 324 individuals in their own home. In addition, the Community Fund helped 433 individuals in financial need plus an estimated 809 people attending 9,383 sessions through the activities of the Community Impact Team.

In 2018, therefore, a total of 1,846 people (54% of 3,391 service users) were supported financially by the Trust (2017: 1,737 people were supported financially representing 57% of 3,040 service users). □

	£'000s	%
	2018	
<b>Operating Income and Expenditure</b>		
<b>Income</b>		
Investment income	7,571	18.7
Income from residents of our care homes and sheltered housing	23,560	58.4
Income from services provided to residents and visitors	3,140	7.8
Income from accommodation	4,739	11.7
Income from the Care at Home service	1,236	3.1
Other income (training, rent, services, miscellaneous)	112	0.3
<b>Total Income</b>	<b>40,358</b>	<b>100%</b>
<b>Expenditure</b>		
Cost of generating investment income	1,974	4.6
Staff and purchases for the residential and support services	34,739	81.3
Community Fund expenditure	703	1.6
Accommodation costs	2,652	6.2
Depreciation of assets	2,588	6.1
Governance of the Charity	60	0.2
<b>Total Expenditure</b>	<b>42,716</b>	<b>100%</b>
<b>Deficit of Income over Expenditure</b>	<b>(2,358)</b>	<b>–</b>
Less: The Chocolate Quarter exceptional start-up costs	2,785	–
<b>Established operations Surplus of Income over Expenditure</b>	<b>427</b>	<b>–</b>



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