



St Monica Trust

Communities where older people flourish

Our priorities for 2023 to 2033



Foreword



We are St Monica Trust. We believe in communities where older people flourish – where they are connected, can contribute and have choice to live independently in places they enjoy.

As St Monica Trust reached its 100-year anniversary, we turned our attention to planning our future. We imagined what our Founder, Dame Monica Wills, would focus on if she was alive today and how we can best build on our legacy. Our 10-year strategy was born.

This document summarises what we plan to do next. Our strategy was developed with you and for you and those who come next. Over 1,300 residents, family members, colleagues (staff and volunteers), members of the public and other organisations helped to decide what we should focus on for the next decade and beyond. People said that St Monica Trust needs to think about who we are and what we want to achieve as an organisation, not just the activities or services we might provide. We took this to heart.

We have lots of work to do now to put these words into action and we will keep working with you every step of the way.

A handwritten signature in dark ink, appearing to read 'D Williams', with a large, sweeping flourish underneath.

David Williams
Chief Executive

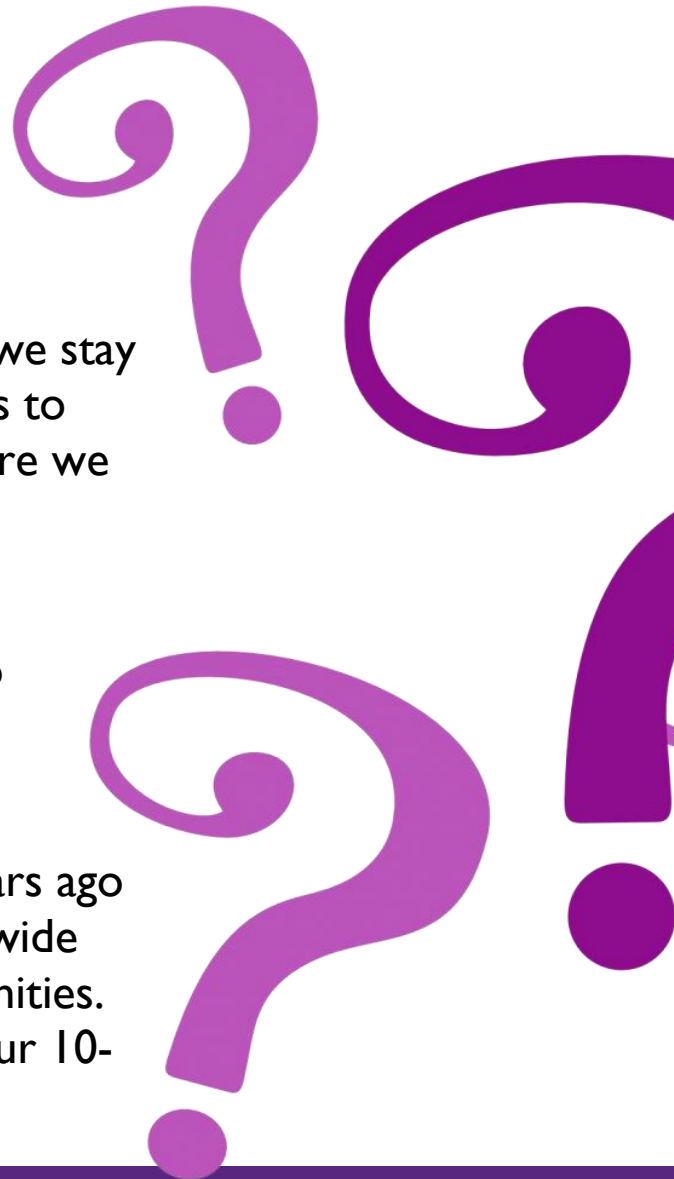
Why have a 10-year Strategy?

Long before the welfare state, Dame Monica Wills had the vision to create a place where older people who served their community could live out their lives in peace and comfort. Beautiful Oatley House in Cote Lane was built using a generous family endowment. From then on, St Monica Trust led the way in providing retirement living and care homes for older people.

But a lot has changed over the past 100 years. We need to make sure that we stay fit for the future, able to meet older people's needs now and for many years to come. We need to upgrade our facilities, keep up with technology, make sure we do our bit for the environment, and recover from the pandemic.

Many more people will reach retirement age in coming years. With the economic climate, people may be retiring without the capital or pensions to afford retirement accommodation. Others may prefer to stay in their own homes and live independently, but still benefit from some support.

We are fortunate: the endowment that generously built Cote Lane 100 years ago has grown into a substantial sum. We want to use our resources to help a wide range of older people, including those living outside our retirement communities. That's why we reviewed who we are as an organisation and what we do. Our 10-year strategy will guide what we focus on for the next 10 years.



How did we create the 10-year Strategy?

More than 1,300 people helped decide what St Monica Trust will focus on.

We listened to what was most important by:

- interviewing all 14 **trustees** and running three day-long **workshops** with them
- setting up **four working groups** involving colleagues and trustees to focus on key topics
- listening to over 300 residents, family members and colleagues during **meetings and interviews**
- **surveying** more than 600 residents, family members, colleagues, potential residents and organisations that we've worked with
- **telephoning** over 400 local households and approaching people in public places to hear what potential future residents think
- testing our emerging priorities with over 350 residents and colleagues at **roadshow meetings** in each retirement village

We brought everyone's ideas together to create our strategy for the next 10 years.



What are we aiming for?

Residents, colleagues, and potential residents all said that communities have the power to connect people and help them flourish. That's why we refreshed our purpose statement and set out three primary aims:

Communities where older people flourish

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

Our purpose and aims reflect what people said would have most impact on helping older people flourish.

One of the ways that we can achieve our aims is to provide retirement villages and care homes. But we can help even more people if we also strengthen communities where older people live beyond our walls. That started us thinking about the best ways we could reach people across our region, including people who have worked hard all their lives but may not have a lot of resources to support their retirement.



How will we achieve our aims?



We are a charity first. We are proud of our strong history as a provider of retirement villages and care homes. We want to build on this and strengthen our charitable foundation. We will organise in two distinct parts in future, with **equal focus on both**.

- Our **provider arm** will focus on offering great retirement villages and care homes, starting with upgrading and modernising our current sites.
- In addition to external grant making, our **charitable foundation** will focus on innovation in services and workforce development, as well as continuing to support our residents where appropriate.

In future, in line with our Founder's vision, we want to help the many older people who have worked hard all their lives, yet may have few resources to maintain a comfortable retirement – the 'mid-market'.

“St Monica Trust has great people living and working here. There are challenges but lots of strengths too. If [the Trust] follows through on what everyone has said then this can become a more modern organisation working alongside older people. It's an ideal time for a reset. There is so much potential to help people and become an even greater force for good.” (Volunteer)

“If you stay with the status quo then you get left behind, so it is important to move with the times and think about how society is evolving. St Monica Trust should research what people will want in future and how other countries and cultures look after their elderly... Research the best ways to help older people who don't want or can't live in villages. And evaluate whether you make a difference. That is key to keep improving.” (Village resident)

Retirement villages and care homes

The main things that our provider arm will focus on are:

What we will do	How we will do it
Getting the basics right	<ul style="list-style-type: none"> • Maintaining and improving our buildings • Having consistent standards across sites • Improving communication and resident engagement
Helping residents stay well	<ul style="list-style-type: none"> • Focusing more on proactive care • Focusing on the wider health and well-being of residents
Supporting our Colleagues	<ul style="list-style-type: none"> • Being an employer of choice, recruiting and retaining the best staff • Ensuring colleagues have the right training, tools, and resources • Supporting and enhancing career development
Balancing the books	<ul style="list-style-type: none"> • Making sure we break even, balancing income and costs • Reviewing our services so we deliver better services more efficiently
Making the best of our existing sites and looking for chances to grow	<ul style="list-style-type: none"> • Completing our Transformation and Recovery programmes • Completing development of our existing sites • Offering affordable options for the mid-market target group • Developing a growth plan for the next 10 years
Thinking about supporting people in their own homes	<ul style="list-style-type: none"> • Exploring how we might make the St Monica offer available to people in their own homes



Charitable foundation



The main things that our charitable foundation will focus on are:

What we will do	How we will do it
Giving grants so we help older people living in the wider community	<ul style="list-style-type: none"> ● Making sure all our charitable giving is linked to our aims ● Increasing grants and raising awareness about our grants ● Focusing on a specific geographic area to target people who will benefit most ● Developing new funding partnerships to increase our impact
Testing new ways to meet people's needs	<ul style="list-style-type: none"> ● Researching the needs of people in the mid-market ● Build innovation capability to develop new ideas that help older people flourish
Supporting staff and the wider social care workforce	<ul style="list-style-type: none"> ● Setting up a St Monica Trust Learning Academy ● Setting up a St Monica Trust Fellowship Programme ● Designing new roles to meet the challenges of the future workforce
Making sure we are using our charitable resources well to get the biggest impact	<ul style="list-style-type: none"> ● Using 4% of our total endowment to fund our charitable activity ● Redesigning our decision making to ensure our endowment adds real value ● Measuring our impact to learn and improve
Giving funds to our villages, care homes and residents	<ul style="list-style-type: none"> ● Deciding what extra services to support in our villages and care homes ● Helping current residents stay living with us if they need a hand financially

What are the next steps?

I. We will get the basics right

Residents, colleagues, and potential residents told us that to achieve our aims we first need to get the basics right:

- **Upgrade and modernise** our existing sites
- **Communicate** better with our residents, colleagues, and other partners
- Support and train our **staff**, managers, and volunteers
- Focus on **environmental sustainability** for future generations

We will make sure that all our sites reflect our purpose for communities where older people flourish, where they are connected, able to contribute, and have choice to live as independently as possible.

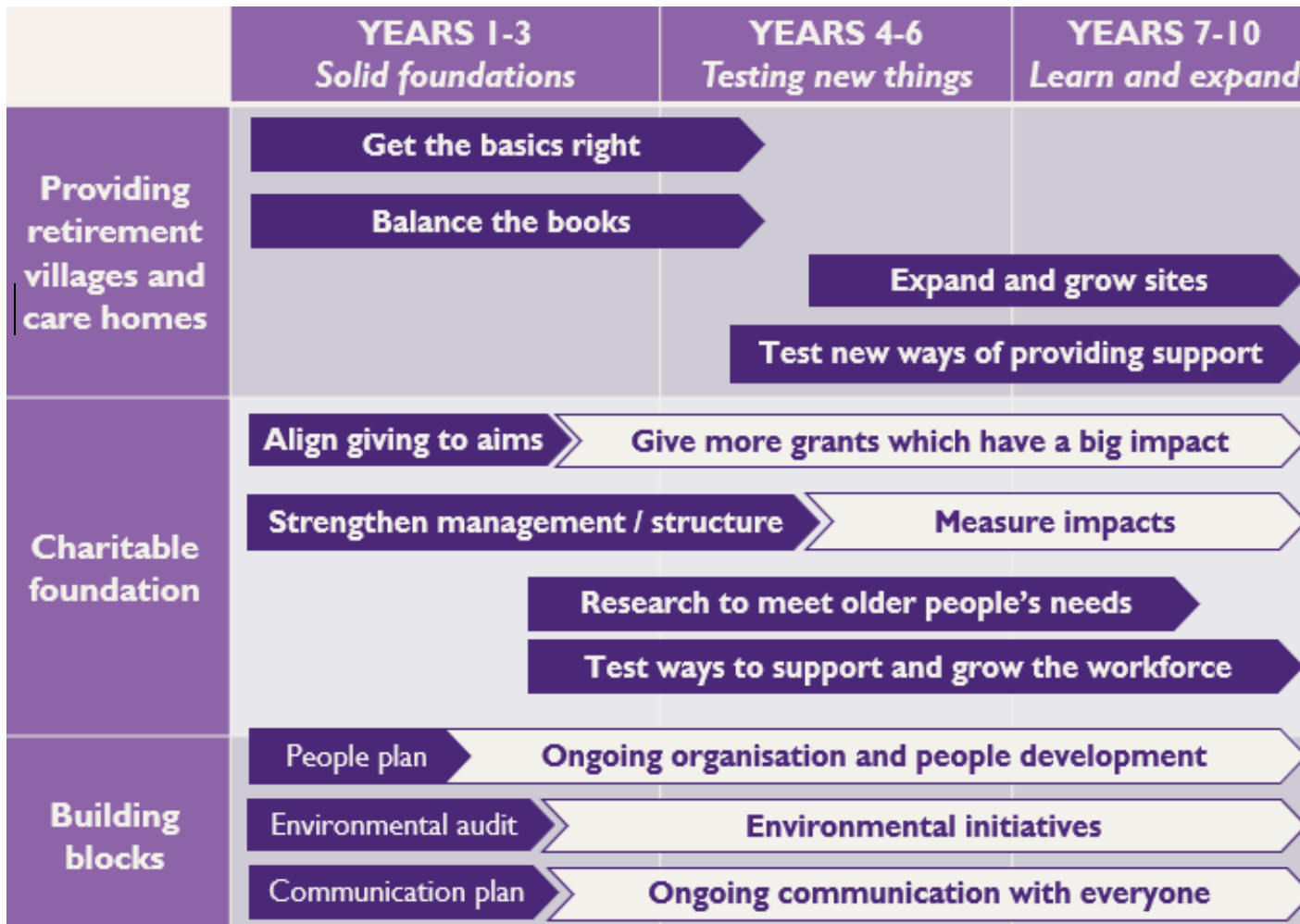
From 2023, we will plan practical ways to do this at each site.

We will continue to involve residents, loved ones, and colleagues as we develop and implement our plans.



2. We will take things step by step

In the first three years we will focus on building even stronger foundations and getting the basics right. Then we will start trying new things and expanding.



3. We will keep an eye on progress

We will measure whether we are helping to achieve our three main aims: helping older people live their best lives, feel valued and useful, and live as independently as possible.

We will report back regularly how things are going to the St Monica Trust Council, and to residents and colleagues at least once per year.