

Village Voice



St Monica Trust



From David...

The St Monica Trust's overall purpose is creating communities where older people flourish, through connection, contribution and choice.

By that we mean communities in the wider sense, which includes the communities beyond our retirement villages and care homes – just as the Trust's founders originally envisioned.

The recent launch of the Charitable Foundation sits at the heart of our long-term strategic planning and is a continuation of one of the Trust's founding principles, along with the creation of "St Monica's Home of Rest", of providing financial assistance to those in need.

This dates back more than one hundred years to Annie Butcher, who lived at 13 St John's Road,

Clifton and had worked in India as a nurse. Annie was the first applicant for financial assistance from "Monica Wills Annuities", and on 16 July 1924, Annie's application was approved. She was awarded a payment of £50 per annum, worth approximately £7,500 in today's money.

With the creation of the 10-year Strategy, we've recognised that investing in the wider community needs to be done over a longer period of time and involve bringing people and organisations together to work in partnership with The Trust.

Rather than tackling the individual issues affecting older people, such as loneliness and isolation, the Charitable Foundation will address these issues at their roots.

The best way to achieve this is by creating opportunities for older people and effecting real change in our communities through increased funding, learning and technology.

This approach presents a genuine opportunity to do things differently and challenge what has been done in the past with a clear focus.

We see this as an opportunity for the St Monica Trust, our partner organisations in the third-sector and the wider community, to

shape the interventions that we want, take control of the agenda and work co-operatively to produce effective solutions.

Although the focus of this update has been on the longer-term aims of the Charitable Foundation, we hope residents continue to feel the benefits of our commitment to deliver meaningful improvements to your own communities.

The 2024 Financial Summary included in this issue of *Village Voice* shows the Trust's strong financial performance. Embracing sustainable growth means that we can continue to invest in the things that are most important to you, such as the continuing programme of site improvements and the creation of the village hubs.

We hope that you and your friends and loved ones are enjoying the extended offerings and decor of the Trust's new village cafés.

As always, thank you for your continuing support.

Best regards,

David Williams
Chief Executive



Block D named Millstream by Chocolate Quarter resident

The Trust's newest development at The Chocolate Quarter in Keynsham has been officially named Millstream.

A naming competition held for residents and colleagues at The Chocolate Quarter was won by Jane Lucas. Jane, a former midwife from Bristol, has been a resident at The Chocolate Quarter since November 2017 and was one of the very first residents to move in.

Jane's winning entry was inspired by The Chocolate Quarter's proximity to the River Avon and the nearby Saltford Brass Mill, which provided the power for the Bristol Brass Company in the 18th century.

Jane said: "When thinking of a suitable name, I knew that it had to start with a different letter to River House and Brookmead. Like the names of the other blocks at The Chocolate Quarter, it also had to have a connection with water, and the Brass Mill is such an important part of the River Avon's history."

Millstream will be a five-storey building offering 44 independent living apartments, with 18 apartments being affordable housing units. Completion of Millstream is expected in September 2025.

Head of Retirement Villages, Roger Hayward, said: "Before moving in, Jane and her late husband were part of the original focus group that helped inform the design and services available within The Chocolate Quarter.

"The fact that Jane was involved in the creation of The Chocolate Quarter and has now named the building, which will mark the completion of the Trust's redevelopment of the former Somerdale Factory, means we couldn't think of a more apt winner."

Maligayang pagdating!

We were delighted to hear of the warmest of welcomes given by residents and colleagues to the first group of overseas colleagues to arrive at the St Monica Trust.

Diana, Carina, Meranel, Freddie, Jesse, Edgardo Jr, Rex, Jodel, Lea, Leizel, Percy, Erissa, Querizca, Beatriz and Francis arrived from the Philippines in June and are settling in well at Garden House and at The Russets and Sherwood.

Our overseas colleagues were recruited via an ethical, specialist agency, and for their first six months they will be living on site before moving to local rented accommodation in Bristol and North Somerset.

Pastoral Care Coordinator, Christine Ramsgate, said: "Residents at Cote Lane's St Monica Court hosted a tea party for our newest colleagues, and have been invited back for a home-cooked Filipino meal. While at Sandford Station, they were taken to lunch in the Pullman Restaurant and invited to join residents for their regular Friday evening drinks.

"This is a wonderful example of connection and contribution and is exactly what we imagined when we asked village residents to offer the hand of friendship to their new neighbours."



St Monica Trust announces launch of Charitable Foundation

The “biggest shake-up” of the St Monica Trust’s charitable giving in its 100-year history has been announced.

A new Charitable Foundation will see the Trust become part of a consortium delivering a Charitable Programme of £1.5 million per year, as well as establishing a sector-leading Training Academy and creating a Centre of Innovation embracing the latest technological advances in the care sector from across the world.

The St Monica Trust’s Chief Executive, David Williams, said: “Alongside the commitment to build “The St Monica Home”, the Trust’s original 1922 title deed also committed to establish “Monica Wills Annuities” to provide financial assistance to those in need.

“With the creation of the Charitable Foundation, we are looking at a continuation of our founders’ principles and repurposing

them to provide even better outcomes for older people through the three strands of funding, learning and technology.”

‘delivering a Charitable Programme of £1.5 million per year’

Under the Charitable Foundation, £500,000 per year from the Trust’s existing charitable giving fund will be reallocated to the Charitable Programme, with the rest coming from its partner organisations within the consortium.

In total the Charitable Programme will deliver funding of £1.5 million per year with the aim of ending isolation and loneliness among older people.

An Academy will also be established at the Somerdale Pavilion in Keynsham to create a future workforce for both the Trust and the wider health and social care sector.

Thirdly, a Centre of Innovation will be created to design new models of care and integrated services within the St Monica Trust’s villages and care homes, as well as embedding new technology within the Trust.

The Charitable Foundation was launched on 25 June at the Trust’s Chocolate Quarter Retirement Village. The launch event was attended by organisations and individuals supported by the Trust over the last 12 months, and by representatives from the Trust’s apprenticeship schemes.

David Williams said: “The increased investment in communities beyond our retirement villages is not only reflected in monetary terms and the tangible benefits of the Academy and Centre of Innovation for both the Trust’s residents and colleagues and the wider health and social care sector.

“The evidence-based findings gathered by the Charitable Foundation will also be used to influence key thinkers nationally and effect real change to societal issues, such as loneliness and isolation, that continue to blight the lives of older people.”

For more details on the St Monica Trust’s Charitable Foundation go to www.stmonicastrust.org.uk/charitable-foundation.



2024 Financial summary

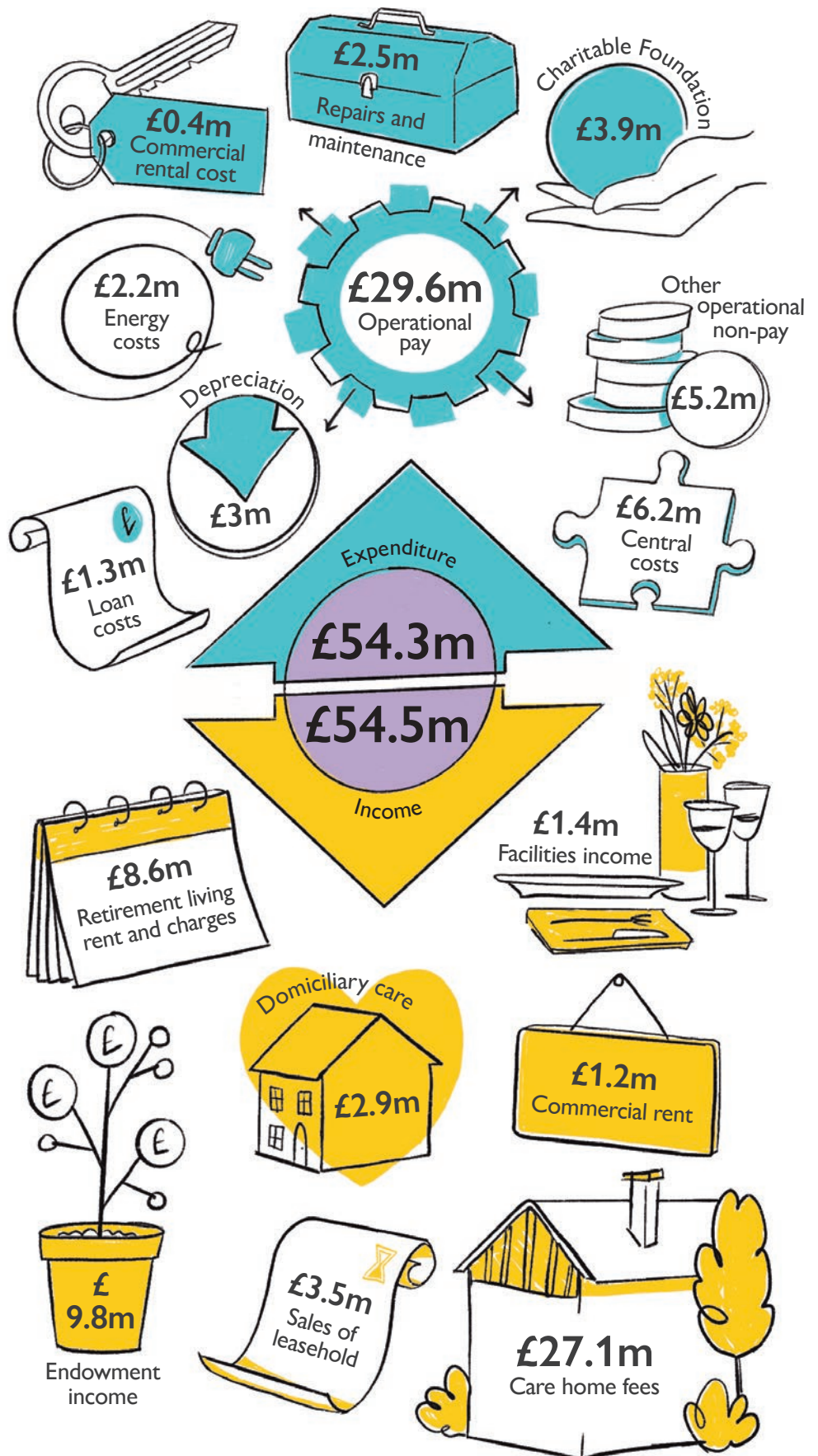
Each year the St Monica Trust publishes its Financial Statement, which is put together by Finance Director Paul Weston and his team, to be presented at The Trust's AGM.

It provides information on how the Trust generates its income, what it spends its money on and the role that the endowment fund plays in providing the charity with financial stability.

Financial statements can be difficult to understand for those of us who have a limited knowledge of accounting. For that reason, we have produced an infographic to give readers of *Village Voice* a simplified, visual overview of the Trust's financial position.

Overall, the Trust budgets on a break-even basis in that our costs are similar to our income. In 2024 our Operational and Central Expenditure amounted to £54.3 million against an anticipated income of £54.5 million.

In the next issue of *Village Voice*, we'll show how the St Monica Trust's investment of £3.9 million in the Charitable Foundation, the £3.8 million investment in the Trust's existing buildings and the £8.4 million of additional funds for one-off investments are being spent in 2024.





Each year more than 125 volunteers bring a range of skills and interests that enrich lives within our retirement communities and care homes.

The Trust's Head of Well-being and Resident Engagement, Wendy Hodsdon, said: "Establishing a Resident Contribution Plan in 2024 is a key element of our ten-year Strategy and will support more residents to join Rosa and others in volunteering – both within and beyond their own St Monica Trust communities.

"We're really excited to start working to identify and create a wide range of meaningful contribution opportunities that utilise residents' skills, experience and knowledge. It's so important that people continue to feel valued and useful – whatever their age – exactly as Rosa has shown us."

And does Rosa have any advice for residents who may be considering volunteering or contributing to their community? "Rather than worry about doing the wrong thing, just think about what you're good at and what you like to do. I'd always wanted to do psychiatric nursing and I have an empathy with people living in environments that may confuse them. That made volunteering in Charterhouse perfect for me, but there are so many different ways to volunteer at the Trust."

We will be sharing more about how residents can contribute to their communities through volunteering in the next issue of Village Voice.

Rosa: A volunteer's story

For Chocolate Quarter resident Rosa, volunteering was part of her upbringing.

Her grandmother played the organ in the local church and her father was an RAF volunteer during the Second World War. "My mother said: 'You don't stand there and watch people struggle – you go and help them' – so that's what I've always done."

Before moving into The Chocolate Quarter, Rosa volunteered at St Martin's Hospital in Bath for five years and helped support people who were experiencing a mental health crisis.

After her volunteering was put on hold by the pandemic, Rosa was keen to pick up where she left off once things returned to normal.

She said: "The Trust had never had a resident volunteer at one of their care homes before, but Head of Villages, Roger Hayward, encouraged

me, and Volunteer Co-ordinator, Heather James, was open to the idea and was very supportive."

Rosa began volunteering in Charterhouse Care Home's dementia unit and provides support for Well-being Co-ordinator Rosie Liddiard. Once a week, on Tuesday mornings, she spends time with residents and often accompanies them down to Somer Dining to have a coffee and socialise with village residents and members of the public.

Rosa said: "I've always needed a purpose in life, and for me it's about helping people, being a useful member of your community and giving back something of yourself. I get the same feeling from volunteering as someone who has a fulfilling career and it gives me an opportunity to use my skills and share my experiences with others."



St Monica Trust

Emily 'lights the way' for social care nursing

A St Monica Trust nurse recently had the honour of being the Lamp Carrier at the Florence Nightingale Commemorative Service.

Emily Pimm was nominated from hundreds of Florence Nightingale Scholars and is the first nurse from the adult social care sector to be chosen as the Lamp Carrier. She qualified as a nurse in 2006 and works as a Social Care Deputy Manager at John Wills House Care Home.

She said: "I feel very honoured to have been the Lamp Carrier at the Florence Nightingale Commemoration Service and would like to thank my colleagues at the St Monica Trust for all their support. I'm so proud to represent

social care nurses and to celebrate what has been an exciting and pivotal year for the care sector."

The commemorative service was held at Westminster Abbey on 15 May with 2,000 guests in attendance. The service is an annual celebration of thanks for nurses and midwives from across the UK who continue Florence Nightingale's legacy.

Emily was awarded a Florence Nightingale Foundation Leadership Scholarship in 2022 and has gone on to become a co-chair for the South West's Social Care Nurse Advisory Council.

Chief Executive of the St Monica Trust, David Williams, said: "Since she joined us in 2015, Emily has consistently displayed a passion for ensuring that our residents can flourish within our care home environments and lead meaningful lives full of connection, contribution and choice. We could not be more proud of her."

Follow us

Keep up to date with all the latest news and developments from the Trust on our social media platforms:

Facebook:
stmonicastrust

Twitter:
@St_Monica_Trust

YouTube:
@st-monica-trust

Instagram:
stmonicastrust

