

# PEOPLE AT HEART

**A REVIEW OF 2019-2020**

# Our Vision

At Sir Josiah Mason Trust we want everyone, regardless of age or circumstances, to feel secure, have opportunities & to thrive.



# Our Mission

To offer people in need access to opportunities, hope, and a place where they belong through the provision of quality housing, care, support, and education.



# Our Values

**Personalised** – because no two people are the same

**Dignity** – because everyone is worthy of honour & respect

**Innovation** – because we are original and creative in our thinking

**Excellence** – because we want to be recognised for providing quality services & support

**Honesty** – because we are transparent and accountable in all that we do

**Fun** – because we want to be a great place to work and receive support.

# Welcome from our Chief Executive David Healey



## Hello and Welcome to our 2019- 2020 annual review

April 2019 to March 2020 was another exciting year for SJMT, with a period of development and growth not experienced for many decades. The Mason House extension was the first major building project undertaken in 20 years. It presented challenges and significant disruption but has led to the creation of thirteen new homes, improved communal facilities and an attractive, modern frontage.

In July 2019, we welcomed two additional charities and their residents to our family. Holte & Bracebridge Charity and Holy Trinity Heath Town Almshouse Charity transferred to the trusteeship of Sir Josiah Mason Trust. We were also delighted to commence two new projects funded by Solihull Metropolitan Borough Council. The Hospital to Home contract based at Alexandra House funds six reablement beds for older people discharged from hospital to support them to get well and return home. The project has been a great success and demonstrated our ability to work collaboratively to achieve positive outcomes for older people and has been extended for a further twelve months.

The second project was to pilot a Trusted Assessor service in partnership with Solihull Metropolitan Borough Council, the CCG and other local nursing and residential care providers. It has been developed to facilitate discharges from hospital to Solihull care and nursing homes by carrying out assessments on behalf of providers. The Trusted Assessor was appointed towards the end of the year and the project should go live in May 2020.

In 2019, our Residents Scrutiny panel undertook its first scrutiny project; a review of how residents can give feedback and make a complaint. The review culminated in a report, including recommendations, which residents presented to Trustees. This led to a completely new Compliments, Concerns & Complaints Policy & Process for SJMT which is more user friendly and which was signed off by residents. We were delighted to receive an award for 'Excellence & Inspiration' in June at the National Almshouse Association Conference which was in recognition of our work with three neighbouring Almshouse charities in developing and delivering the Residents Scrutiny Panel.

2019 was also a year in which the hard work and dedication of care services was recognised by CQC. In April, Alexandra Court received an overall Good rating again. In December and after a significant amount of work in transforming the provision at Alexandra House, we were awarded a Good rating in all areas following an unannounced inspection.

As a learning organisation with an ambition to be an excellent employer and service provider, in the summer of 2019, we showed our commitment by signing up to a number of excellent initiatives such as The Mindful Employer 'Charter for Employers Positive about Mental Health'. We also launched a Staff Forum which is attended quarterly by nominated staff representatives from across the Trust.

Two of our key strategic objectives are to work increasingly in partnership and to raise awareness of SJMT. In addition to the examples we have already shared, in the year, we also formed an excellent partnership with St Paul's Community Development Trust based in Balsall Heath. The aim of the partnership is to promote inter- generational understanding between school pupils (aged 11-16) and older people living in our residential accommodation, through organised activities.

During 2019-2020 I became a Trustee of the National membership organisation and Regional Coordinator of Local Almshouse Meetings. This will enable us to further develop our relationships with the Almshouse Association and neighbouring almshouses charities. In the winter, we also appeared on a feature on the renaissance of Almshouses on Sky News and in some National newspapers.

Towards the end of the year, following consultation with residents, we began to introduce the most significant restructure of our Housing Support Services in well over a decade. This will lead to an increase in the amount of support residents will be able to receive and should respond to some of the concerns highlighted in the last Residents Survey.

Finally, we hope that this report is really informative and that it lives up to our key values. We believe that this report is an honest reflection of 2019-2020 and demonstrates our commitment to be 'transparent and accountable in all that we do'. It highlights the hard work of all those that work and support SJMT and captures our amazing journey over the past 12 months.

## **Building on Strong Foundations – Our Achievements 2019-2020**

In this year's report we have focused the evaluation of our work on our five core goals as set out in our Building on Strong Foundations (2018-2023) Strategy.

# To Be A Leading Provider

*“We will work more in partnership in all that we do to achieve outcomes for individuals by developing a range of new partnerships and collaborations that help achieve our vision”*

We were delighted to announce that as of July 2019, we took over as Corporate Trustee of Holte & Bracebridge Charity and Holy Trinity Heath Town Almshouse Charity.



Holy Trinity Almshouse in Wolverhampton

Holy Trinity Heath Town Charity was founded in 1850 and consists of a terrace of 6 Grade II listed terraced houses in Jacobean style, the first listed buildings managed by the Trust and the first homes outside of Birmingham and Solihull.

## Holte & Bracebridge Cottages

The Holte & Bracebridge Charity dates back to 1650 and provides 10 cottages in Erdington just one mile from the site of our first ever Almshouse & Orphanage. As the Trust is local, it will mean that we can increase the amount of support we can provide to residents and encourage them to be part of our active community. Being a Corporate Trustee will mean that the Trust will operate these charities as it would any of our charities, but that we can protect their name and identity whilst offering quality support to residents.



***“We will increase our attendance at local and regional forums, meetings & events”***



We reviewed our attendance and presence at meetings/forums, to ensure we were well represented. As part of this we have attended various events such as the Acocks Green Carnival. It was a great day and a chance for the local community to meet us and find out about all we have to offer.

***“Identify area of work where partnership working will; benefit our beneficiaries and be beneficial for the development and growth of the Trust”.***

## **Residents Scrutiny Panel**

The Residents Scrutiny Panel was formed in September 2018 with the underpinning commitment to providing the best possible services for the people we support. The Trust formed the Panel in partnership with other local Almshouses; Harborne Parish Lands Charity, Lench’s Trust and Yardley Great Trust. The Panel consists of 12 residents drawn from each of the charities, who work together to scrutinise the quality of our services from their unique perspective as residents.

The Scrutiny Reps worked extremely hard this year and completed their first topic. This was a detailed look at how we could improve our complaints processes and procedures. As a result, we launched a new Policy & Procedure (including a flyer and form) in October 2019 which is a fantastic achievement and one that will influence services to the benefit of our residents.



Josiah Mason Trust was awarded with an Award for ‘Excellence & Inspiration’ in recognition of our work with three neighbouring Almshouse charities in developing and delivering a Residents Scrutiny Panel.

# All people areEqual

Here at Sir Josiah Mason Trust we believe in egalitarianism - the doctrine that all people are equal and deserve equal rights and opportunities. As part of this we have signed up to the House-Proud Pledge, a scheme designed to ensure Lesbian, Gay, Bisexual, Trans, and Queer (LGBTQ+) residents are able to enjoy their homes without fear of discrimination.

The House-Proud Pledge was developed by House Proud (a network for LGBTQ+ people working in social housing) and the University of Surrey. By signing up to the Pledge, the Trust is committing to improve its services for LGBTQ+ residents and is expected to deliver on three core commitments within the first year.

The three commitments are

1. Ensuring LGBTQ+ residents have an input at an executive/strategic level
2. Increasing LGBTQ+ visibility through the use of the Pledge symbol
3. Initiating a program of staff training to improve understanding of LGBTQ+ lives

The HouseProud Pledge follows the publication of the University of Surrey's 'No Place Like Home' study, the largest of its kind in the UK, to understand the experiences, concerns, and preferences of LGBTQ+ social housing residents. The study found a third of LGBTQ+ residents felt their neighbourhood was not a safe place to live and a third of survey respondents felt their landlord was not able to deal effectively with issues like harassment. Shockingly, a fifth of gay men reported that they regularly modify their home if visited by their housing officer or a repairs person to make their sexual orientation less visible (e.g. moving pictures, books, and DVDs).

*'We are very happy to be a pioneer of this excellent scheme that will help LGBTQ+ people feel more welcome and able have a greater say in how we operate as an organisation. We know that many older LGBTQ+ people have experienced decades of discrimination and that deciding to live at an historic Almshouse organisation like ours can be daunting. We are an inclusive forward thinking organisation that wants to better represent and reflect our community and the pledge will help us work towards achieving this aspiration.'*

**David Healey, Chief Executive**

We look forward to sharing more information in the coming year about the work we will undertake to achieve the three commitments.



# To Help More People

We have completed the extension and refurbishment of Mason House resulting in 13 new apartments.

We have also made changes to Mason Cottages and Jubilee Court and began to draw down grant funding secured from the Warm Homes Fund and E.ON for the installation of 44 Gas Central Heating systems. This has made a huge difference to the lives of residents, particularly at Mason Cottages who had previously had inefficient electric heating in homes that are over 80 years old. We have also agreed the long-term site development plan of Olton



## Trusted Assessor Service

We have continued to develop our relationship with SMBC in achieving their outcomes and efficiencies in order to support more people and create future opportunities for the Trust. We have been successful in recruiting to the Trusted Assessor role.

Elisabeth Sheppard was appointed as the Trusted Assessor lead with Sir Josiah Mason Trust in February 2020. She has a varied professional background including over eight years working within adult social services both front line and at a strategic level, as a development practitioner and practice lead.

The Trusted Assessor service is being introduced on a national scale as part of the High Impact Change Model. The role involves working independently on behalf of care providers to carry out assessments for individuals who are ready to leave hospital and transition into a care home setting. Elisabeth has been working hard to develop this role to ensure that it is unique to Solihull and beneficial to all involved. It is an exciting role and offers a great opportunity to work collaboratively to reduce delayed transfers of care from acute hospitals in Solihull. We are aiming to go live with the service in May 2020.

As well as the Trusted Assessor scheme we have worked with Solihull Metropolitan Borough Council on The Hospital to Home project based at Alexandra House, which funds six reablement beds for older people discharged from hospital.

We work as part of a multidisciplinary team to support them to recover and return home. The project has been a great success and demonstrated our ability to work collaboratively to achieve positive outcomes for older people and has been extended for a further twelve months.



## Housing Services Staff Structure Review

In early 2020, we undertook a review of our Housing Services staff structure, which had been in place for many years. This involved consultation with staff and residents. In March, we introduced a new role of dedicated Housing Services Manager who is supported by 3 Wellbeing Support Workers. The new staff team are not dedicated to one building but work across all schemes and sites and every resident was provided with a named Support Worker.

## To Be The Best We Can

### “Things are looking GOOD at Alexandra House”

We are absolutely delighted to share the news that we have received a Good rating in all areas following a recent Care Quality Commission (CQC) Inspection at our residential care home Alexandra House.

CQC reported the following observations:

*“...There were enough staff to support people with medication, personal care, and activities of daily living. The home was clean, and people were protected from the risk of infection...Staff looked after people with kindness and had the knowledge to deliver a personalised service.”*



*The above comments highlight that at Sir Josiah*

*Trust we strive to ensure that resident well-being is at the heart of everything we do. Our focus is not only to provide high quality personal care but to provide a plethora of opportunities for our residents to ensure high levels of physical and emotional well-being. Here are just a few examples...*

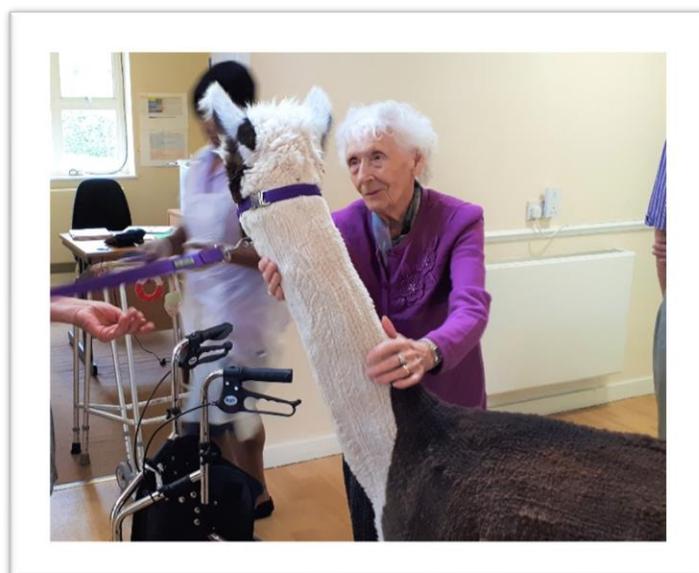
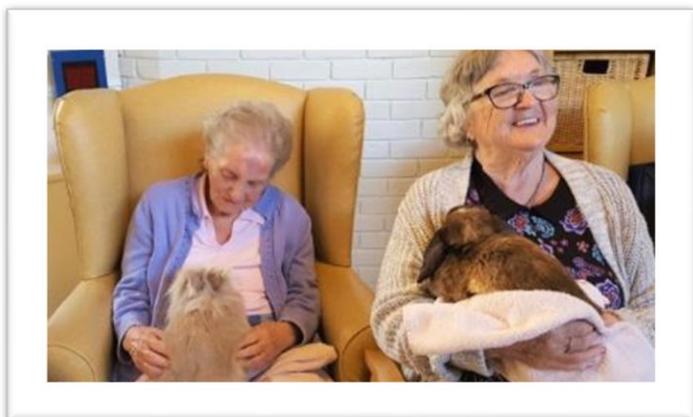
## Animal Interaction....

Alexandra Court, our extra care scheme had the pleasure of welcoming some beautiful Lollipop Ponies from Lollipop Pony Parties on 22nd August 2019. Ponies are known to offer therapeutic benefits; they are intuitive and respond to the emotions of the people around them. Tinkerbell and Little Man the Shetland Ponies were a pleasure as you can see.

We also had the pleasure of welcoming some furry friends from Balsall Heath City Farm which is part of the St Paul's Community Trust. The farm opened in 1980 and is an inner- city oasis providing local families with access to animals that they otherwise might not see. It is a valued community asset and really made a positive impact on our residents who loved the beautiful fluffy rabbits, guinea pig and Bantam hen that came to visit Alexandra House.

Animals are therapeutic and can be beneficial for the general well-being of residents, especially those with Dementia and Alzheimer'. We could see how much the residents loved to hold and cuddle these beautiful animals as well as stroking the lollipop ponies.

Middle England Farm visited us bringing their lovely alpacas who were a real hit with residents. Alpaca assisted activities are known to provide relaxation, stimulation, connection, emotional well-being, and enjoyment for people of all ages and this was clear to see here at Sir Josiah Mason Trust.



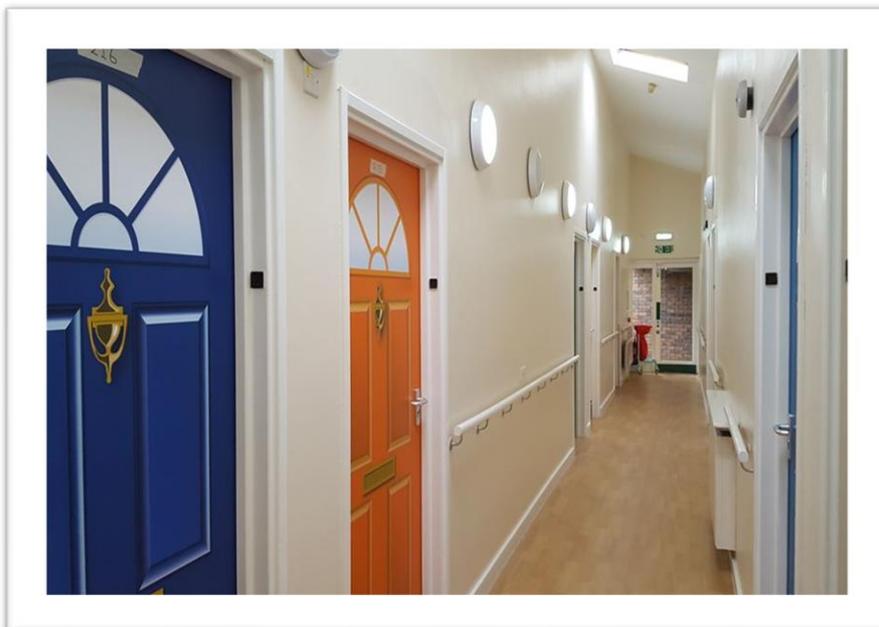
# To Maintain Financial Stability and Growth

During the year, we have been more proactive in generating cost efficiency savings, better managing our resources and maximising income from our investments.

We have also been far more active in fundraising and identifying and applying for grant funding to help us achieve our strategic goals and objectives. This has led to a new Trusted Assessor service, new first-time central heating installation in many of our properties and improvements at Alexandra House.

We sought funding to undertake improvements at Alexandra House and were awarded bursary monies from Solihull Council. The money has been used to re-decorate throughout the service, change the accessibility features, and provide residents with new chairs and coffee tables, not to mention the new dementia family door wraps that are now on everyone's bedroom doors.

Plain doors in a dementia environment such as a care home or hospital department can be confusing for residents. Our specially designed Dementia Door wraps have enhanced the environment, making it easier for people with Dementia and Alzheimer's to find their way around Alexandra House.



# To Be An Employer of Choice

We have launched our staff forum which is attended on a quarterly basis by nominated staff representatives from across the Trust.



Sir Josiah Mason Trust Proudly signed up to the Mindful Employer 'Charter for Employers Positive about Mental Health'. As an employer we recognise that in the UK, people experiencing mental ill health continue to report stigma and discrimination at work. Having signed the Charter, we hope that this shows both prospective and current employees that we are committed to creating a supportive and open culture. One where colleagues feel able to talk about mental health confidently and that we aspire to appropriately support the mental wellbeing of all our staff.



We signed up to the Government's 'Disability Confident' Scheme designed to support employers to make the most of the talents disabled people can bring to the workplace. Sir Josiah Mason Trust is committed to inclusive recruitment practices that ensure disabled people are not disadvantaged when applying for employment and to supporting existing disabled staff in the workplace

The CARE badge campaign was launched in June 2019 to raise awareness and appreciation for those who care. The CARE™ badge is a unifying symbol of pride in our social care champions; those providing, receiving, and supporting care. It is a clear demonstration of their pride in the quality work they do and our appreciation for the care and support we receive. It is long overdue recognition for the two million people employed in care outside the NHS, as well as the seven million more unpaid carers across the UK. We have purchased Care badges for all of our staff, and we hope that they are proud of everything that they do because we are very proud of them!



## In house Health & Social Care Trainer

Last year we appointed Natasha Smith as our in-house health and social care trainer. Over the past twelve months Natasha has implemented a bespoke training package across the charity and has worked with all staff offering specific training for each department. Natasha has introduced a tailored training program at Alexandra house, to meet the needs of the staff and the resident's conditions including Dechoker, catheter, cream, and practical training. Natasha and the registered manager at Alexandra house have built a great working relationship with the local nursing team, who now provide us with Restore2 training, which gives staff the skills to monitor residents blood pressure, pulse, consciousness, and temperature. Plus, ongoing training including Fall prevention and Diabetes.

## Housing Services

### Residents Survey 2019-2020

Following on from last year we have used the National Star (Survey of tenants and residents) to collect the views and experiences of our residents. This means that we can compare any change in satisfaction within our organisation over time and measure our performance against other smaller Housing providers, as well as all Housing providers which includes larger Housing Associations.

*We received a 40% response rate which we consider to be good. Internal surveys typically receive a 30-40% response rate, whilst external surveys generate 10-15%.*

*Mason Court had the best responserate.*

*We did not receive below 66% in satisfaction in any question compared to 60%  
2018-2019.*

*In this report, we share some of the key findings in the areas we asked residents about.*

## 2019-2020 Core Satisfaction Results

Satisfied or Very Satisfied	How we compare with...			
	SJMT 2019 -2020	SJMT 2018-2019	Smaller Housing providers	All Housing providers
Satisfaction with the overall service provided	95% >	93%	95%	89%
Satisfaction with the overall quality of the home	97%	97%	97%	93%
Satisfaction with the value for money of rent	95%	95%	95%	89%
Satisfaction with the neighbourhood as a place to live	94% <	96%	97%	92%
Satisfaction with the value for money of service charges	95%	95%	92%	79%
Satisfaction with the repairs and maintenance service	94% <	96%	95%	85%

We were delighted that our residents reported a 2% increase in high levels of satisfaction, with an average of 95% satisfaction with overall service provided.

We are proud that we have maintained high levels of satisfaction with quality of home (97%), value for money of rent (95%) and value for money for service charges (95%).



### Areas we could improve

We recognise that going forward we need to understand why our residents reported a slight decrease in satisfaction in relation to neighbourhood as a place to live and satisfaction with repairs and maintenance service.

## 2019-2020 Residents Satisfaction Results

The chart below shows offers a comparison in residential satisfaction this year against results collected in 2018-2019. It is clear that communication has improved as we have a 9% increase with 96% satisfaction with our ability to keep residents informed on matters that affect them. Also, a 4% increase with 97% satisfied with the overall condition of their property. We would like to see this increase in the next 12 months.



In all other areas we have maintained our scores, suggesting a stability within the organisation in regard to staff.



### Areas we could improve

However, we recognise that there has been a decrease in trust recorded. At SJMT trust is very important to us and we always try to ensure that residents feel heard and supported but sometimes this can break down and this can lead to issues. The figures in this report are reflective of an isolated situation which was being managed at the time the report was written. It was important for us to report on it, but we are confident that it is not reflective of all residents.

## Advice & Support

These results highlight a slight increase in satisfaction with support plans and services provide by scheme mangers. We are pleased to have been able to maintain high levels of satisfaction with benefit services, support when a resident is new to the service and support provided to vulnerable residents.



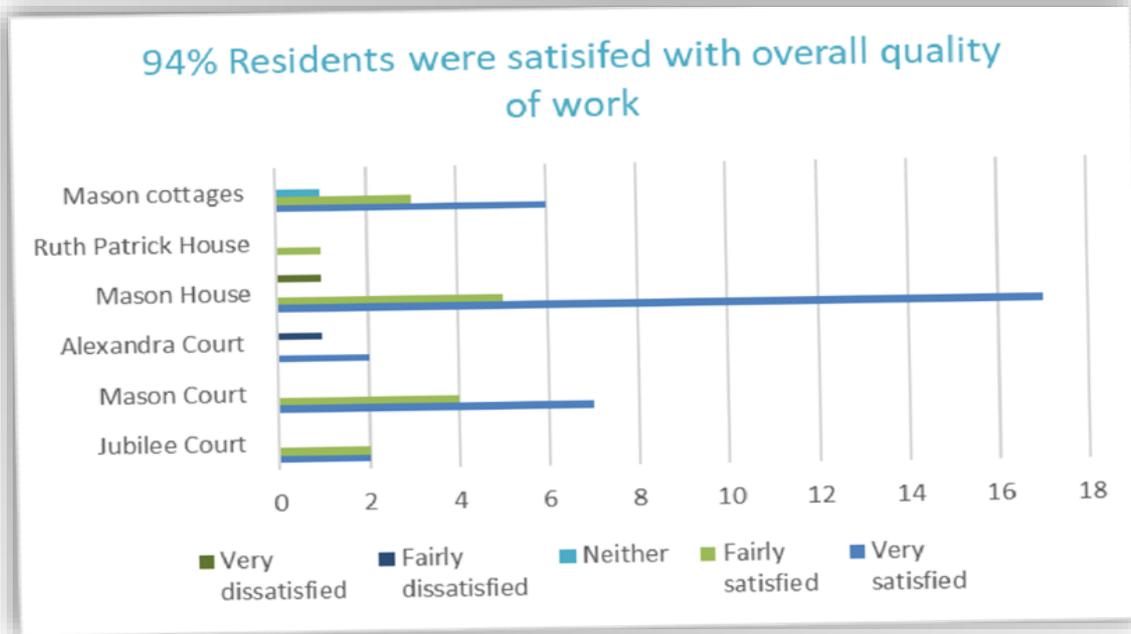
We need to be better at creating Support Plans that satisfy the needs of residents.

90% of residents were satisfied with their Support Plan	93% of residents were satisfied with the services provided by their Scheme Manager	97% of residents were satisfied with the facilities at their scheme
87% of residents accessing benefits support were satisfied with this service. 13% did not use the service.	84% of residents were satisfied with the support they received when new to the service, but 16% did not access this kind of support	86% of residents were happy with support provided to vulnerable residents, but 14% did not access this kind of support

# Property Services

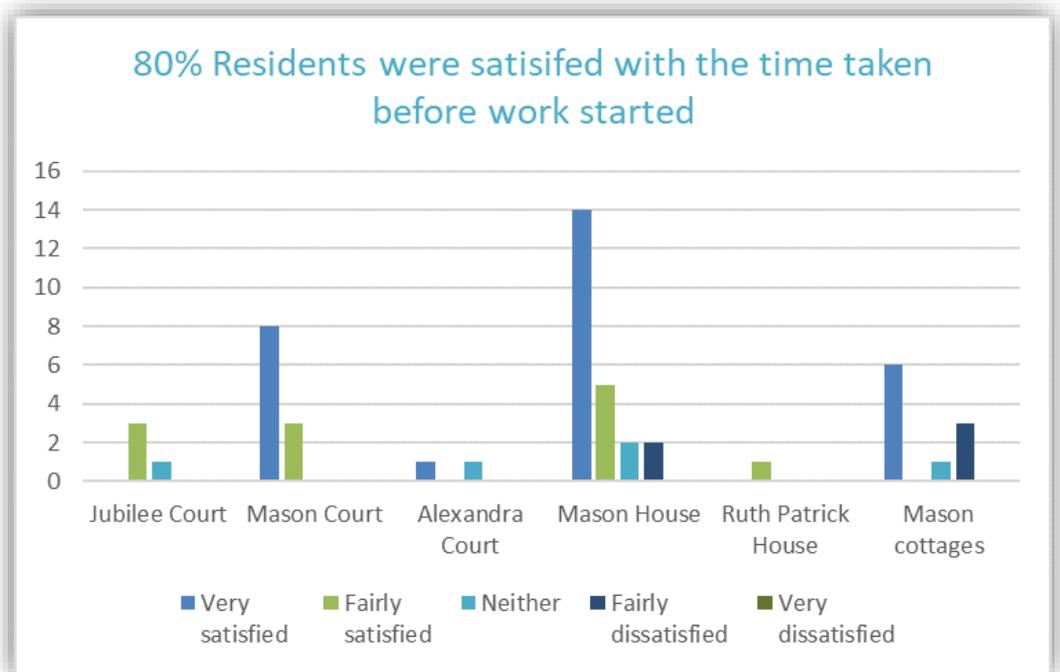
## Responsive Repairs

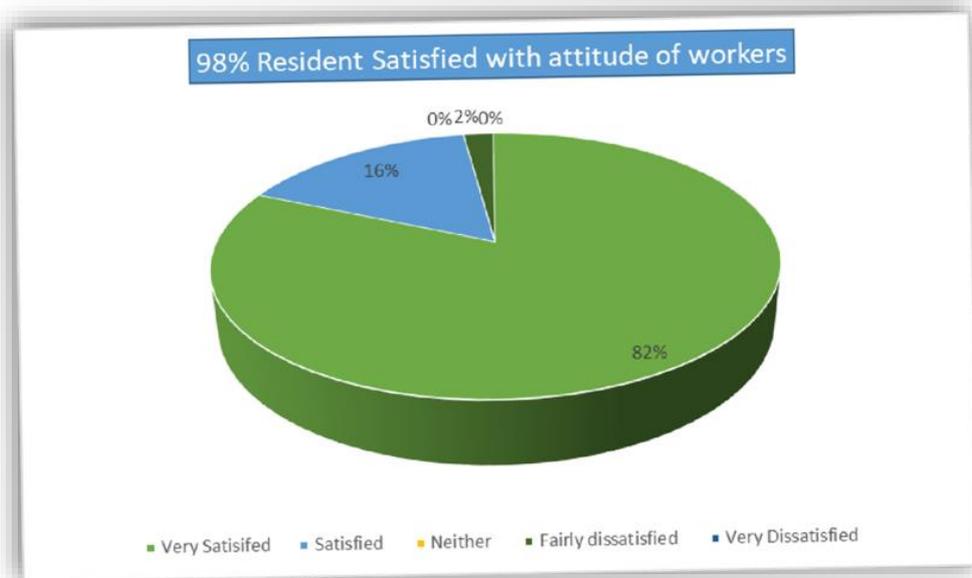
In total survey results told us that 70% of residents had a repair undertaken on their properties in the past 12 months.



As the above shows 94% of residents were satisfied overall with the quality of work. Whilst this is a slight decrease on 96% in 2018-2019 it is a good result given the extensive renovation at mason house and we are confident that this can be improved over the next 12 months.

80% of those that completed the survey rated very satisfied and/or satisfied, this is a decrease from 85% in 2018-2019. We will be working with our maintenance team to identify any barriers to response times to repairs.





We are proud to have scored 98% overall satisfaction in relation to workers attitude. It is a decrease from 100% last year and we will be aiming to achieve this again over the coming months

## Residents top three priorities

The 2019-2020 survey has revealed a distinct change in residents' top priorities. Repairs and Maintenance remains but Scheme managers and Emergency call has been replaced with overall quality of home and keeping residents informed. We feel these reflect the hard work which as the data above confirms we are performing well in these areas.



## Response Repairs

Due to the fact that residents have told us that Repairs and Maintenance was a priority to them for the second year running, we wanted to explore our repair response times to aid improvement in this area.

The table below shows how we performed against our own time frames for completing Emergency, Urgent and Routine Repairs. The statistics relate to all Housing and Care schemes. In total, we processed 1,446 repairs in the 12-month period and 98.58% were completed within our target timescales.

Scheme	Emergency same day repair (within 12 hours)	Urgent (13 hours to 5 days)	Routine repairs (6 to 28 days)	Total per scheme
Mason Court	20	110	178	308
Jubilee Court	1	17	26	44
Mason House	37	84	229	350
Ruth Patrick House	5	14	21	40
Mason Cottages	10	42	149	201
Alexandra House	18	153	191	362
Alexandra Court	7	59	74	141
<b>Totals</b>	<b>99</b>	<b>479</b>	<b>868</b>	<b>1,446</b>
<b>2018-2019% of repairs completed within timescales</b>	<b>98.98%</b>	<b>97.11%</b>	<b>98.58%</b>	<b>98.38%</b>
<b>2019-2020 % of repairs completed within timescales</b>	<b>100%</b>	<b>98.61%</b>	<b>96.96%</b>	<b>98.56%</b>

### How we compare against other Smaller Housing Providers (2019)

Emergency repairs: Other smaller Housing Associations achieved a performance percentage of 100%. We performed 100% which is a 1.02% improvement on 2018-2019.

All repairs: Other smaller Housing Associations achieved a performance target of 97% for completion of all reactive repairs. We performed 98.56% which is 1.56% above average.



We have noted a slight decrease in response to routine repairs compared to 2018-2019 period. Interestingly, this corresponds with a slight dip in satisfaction with repairs and maintenance and suggests the time frame for routine repairs requires improvement. We hope to be able to hit our 98% plus target over the next period.

# Care Services - What Do You Think Of Us?

## Resident Survey 2019-2020



The following results have been compiled from monthly surveys completed by residents at Alexandra House during 2019-2020. It offers a snapshot into how residents experience the care and support given. It includes feedback from a wide demographic including long term residents, new arrivals, hospital to home residents and those leaving the service.

### Q1&2

Residents who feel that staff have treated them with respect and dignity	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	100% Agreed Overall 67%	33%				
Residents who feel that staff have listened to them	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	96% Agreed Overall 54%	42%	4%			

Treating people with dignity and respect is a basic human right as per the Human Rights Act (1998). Care providers also have to meet Health and Social Care Act 2008 (Regulated Activities) Regulations 2014: Regulation 10 - Dignity and Respect.

Achieving 100% overall agreement shows that SJMT has provided care in a way that ensures residents' dignity and treats them with respect. It includes making sure that residents have privacy, treating them as equals and providing any support they might need to be autonomous, independent, and involved in their local community. In order to be able to do this, residents need to feel that they are being listened to and the data suggests that we are doing this. We aim to strive to achieve 100% listening and maintain our 100% dignity and respect result going forward.

Both results echo the CQC comments as follows:

*“Staff encouraged people to remain independent and were considerate not to take over or rush people. People were able to spend time quietly or with the company of staff who consider their privacy and dignity...”*

### Q3

Residents who feel that their cultural and spiritual needs have been respected	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	17%	33%			49%	



The response to the above is ambiguous given 49% residents felt it did not apply to them and the reasons could be interpreted in several different ways indicating a flaw in the actual question. It relies on an understanding of culture and spirituality and often this can be viewed as referring only to religion.

Sir Josiah Mason Trust recognises that religion could be part of someone's spirituality, but spirituality is not always religious. That it can mean different things to each person. Spiritual needs include needing purpose, needing to love and feel loved, a sense of belonging and feelings of hope and peace.

In light of this we will be reviewing this particular question in 2020-2021 to include spirituality prompts to aid understanding. This is important as the question allows the Trust to understand and plan support to meet spiritual needs on a personalised level. This could be supporting a resident with religion-based activities such as prayer. Or, for other residents it could be enabling them to be with friends and family, spending time in nature or hobbies.

### Q4

Residents who report they have received relevant and sufficient information about the service	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	33%	43%	18%	9	7%	8%



The feedback evidenced above needs to be explored further as only 76% felt information was relevant and sufficient. In comparison, under the housing residents survey the same question revealed 97% overall satisfaction. It poses the question can Alexandra House learn from other sites, or does information need to be presented and/or accessed differently. These are queries which will be taken forward for action.

## Q5&6

Residents feel that they have been involved in deciding on the support and care they receive	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	24%	60%			16%	
Residents who feel that staff have given them the right kind of support and care	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	56%	44%				

100% of residents agreed overall that they received the right kind of support and care which is a credit to the staff at Alexandra House. 84% of residents felt they had input into deciding the support and care received. We hope that this continues to improve as the organisation strives towards personalised and strengths-based quality care.

## Q7

Residents who feel that staff have supported them to achieve their goals	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	32%	40%	3%		17%	8

Over the past five years there has been a distinct move away from a generic one size fits all approach to care, to one that celebrates person centred care. Care which recognises people's strengths and the importance of enabling and empowering people to be involved and make their own choices about their care. This requires staff to work collaboratively with residents to understand what is important to them, set goals and strategies of support to enable people to achieve meaningful outcomes.

Therefore, everyone at Alexandra House should have discussed their goals and have them noted in their care plan. We know from this survey that 84% of residents felt that they had input into their care plan and so there is an imbalance when 28% of residents - nearly a third, felt that 'goals' either didn't apply, disagreed or preferred not to say.

This needs to be examined on two levels. The first being to work with staff to ensure that care plans are co-produced with the individual and/or family. Secondly a review into the language used as 'goal's may not be meaningful for residents or staff and it could be that we consider using alternative language in conversations and documentation such as what the person wants to achieve, learn, develop or maintain.

**Q8**

Residents who say staff have helped me to feel safe	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	72%	27%	1%			
Residents who say that the food has been of a good standard and they have enjoyed it	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	29%	21%	17%		33%	

99% of Residents reported staff made them feel safe - this is a great result, but we strive for 100% going forward.



We were aware of levels of dissatisfaction in regard to meal standards and enjoyment and have taken the measure to completely review and revamp this service during 2020- 2021.

Residents who say they have been actively involved in the service activities	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	27%	45%	11%		17%	

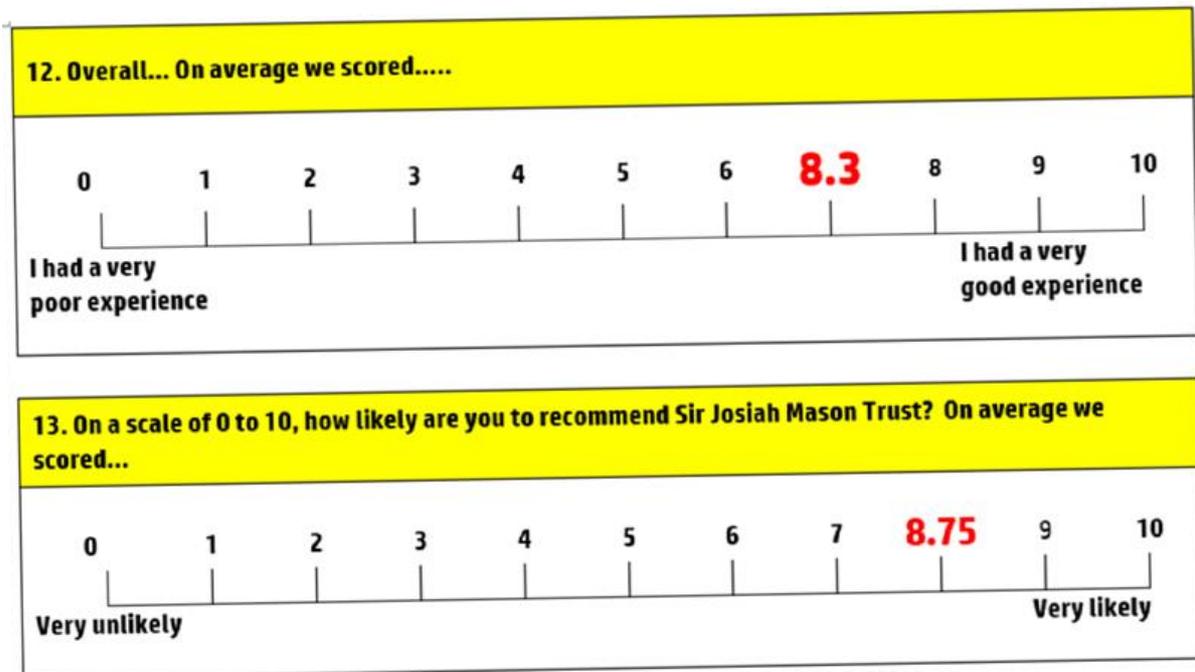
Sir Josiah Mason Trust recognise that opportunities and social activities provide stimulus and are essential in a holistic approach to care rather than a focus on only meeting physical needs. We have made good progress over the last 12 months as detailed under the stories captured under our strategies 'Be the best we can'.

However, we are aware that there is more to work to do in this area. As part of this survey residents have the opportunity to add comments and we have identified those in relation to activities and have taken the following action as part of 'You said we did'.

- Having a blanket and heater available in the conservatory so residents can sit in there and enjoy the view.
- Trips out - we are currently looking into ways that we can provide this type of provision.
- Support for residents who wish to walk around the grounds.
- Moved the piano to an accessible but quieter place to encourage those residents who like to play and we have seen and heard residents playing the piano.
- As requested, we have purchased a dictionary to support with puzzles and additional puzzles which are in the Corrin Lounge.
- As requested, we have purchased, naught & crosses, connect 4, quoits, bat & ball, and chess.

The above requests are very much individualistic or small group-based activities and so it suggests we have perhaps focused on larger group-based activities. We will continue to monitor and ensure we offer a mix of personalised activities.

Overall, on average we scored eight and above in terms of service and experience and in recommendations to others.



## Areas you have told us where we could Improve Housing Services

In conclusion to the survey feedback we have been able to identify the following areas of improvement.

### 1. Repair & Maintenance

- We will undertake a review of performance and roles within the maintenance team

### 2. We need to be better at creating Support Plans that satisfy the needs of residents

- We will work towards achieving 95% satisfaction - building on the increase from 89% to 90% noted in this survey.

## Care Services

### 3. To ensure Residents feel their cultural and spiritual needs have been respected

- Review the Care Services survey to ensure the language in this question is clear and that all those involved understand what we mean by cultural and spiritual needs.

### 4. To provide residents with more relevant and sufficient information about the service.

- Review what information is provided to residents at Alexandra House, exploring accessible formats – larger audible format on tablets, staff reading info to family etc.

### 5. To ensure that all residents feel that they have been involved in deciding on the support and care they receive and to achieve their goals.

- Review the Care Services survey to ensure the language in this question is clear and that all those involved understand what we mean by goal.
- To ensure that staff receive regular refresher Care Planning training and that this is embedded in Induction.

### 6. To provide food that is of a good standard and is enjoyable. To review the Catering provision including staffing structure, serving times, menus etc.

- To review the Catering provision including staffing structure, serving times, menus etc.

### 7. Increase the levels of participation and satisfaction in the activities programme.

- To encourage and support residents individually and collectively to be more involved in activities including personal hobbies and interests and to ensure that the activities program reflects a range of interests.



## Apprenticeships

We fund apprentices across the different areas of our charity including catering, painting, and decorating, care and customer services. Apprenticeships are an excellent way of getting a head start in a particular field of work and to enable young people to start working and earning a wage while they learn key skills and gain the qualifications that employers need.

This year we have provided a placement to two young people, Megan, and James.

### Megan

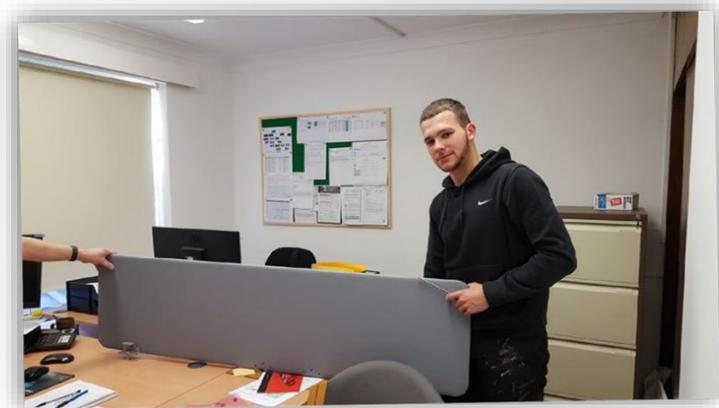
Megan started working as an Apprentice Receptionist at Sir Josiah Mason Trust in July 2019 and quickly became one of the team. She is always willing to help and has a lovely cheerful manner which lends itself to being approachable and customer focused. Megan has enjoyed her time with us stated:

*"I am really enjoying my time here as an apprentice receptionist, working with the staff, and developing my skills. My confidence has grown. There is always something new to learn, I love meeting the residents and really look forward to coming into work every day".*

### James

James starting working in property and repairs services in March 2020 and is new to the role but has settled in quickly and is enjoying his apprenticeship so far.

*"I am part of the maintenance team which basically does a bit of everything. I do not really have one thing I like most about the job role as I like everything. It is a great place to work and really enjoyable, the work staff are fantastic. This apprenticeship will help me in the future to have a basic understanding of all trades when I am qualified".*



# Academic Enrichment Programme

During 2017-2020, we are funding the Academic Enrichment Programme (AEP) delivered by the University of Birmingham. This life-changing programme encourages and supports young people from less advantaged backgrounds to realise their higher education aspirations.

In the last academic year 92 students attended the residential activity from 46 different schools and colleges. Of those, 78 students had no parental history of higher education and 85 of the students had a household income below £42,875. The programme gives year 12 students an amazing opportunity to experience what life is like at University.

Students who are successful in gaining a place on this programme benefit from the following:

- Support with raising students' academic grades through two study skills sessions in Year 13.
- Support from current undergraduates via e-mentoring Support with their decision-making process.
- Firsthand experience of the academic learning to be expected from a research-led institution during the weeklong residential in August.
- An invitation to attend the celebration event that recognises the hard work of all the participants on the programme.



David Healey our CEO had a great day at the University of Birmingham in January, meeting staff and students, finding out more about the difference that the support of Sir Josiah Mason Trust continues to have on the lives of disadvantaged young people.

# St Paul's Community Development Trust



St Paul's Community Development Trust works with and alongside the people of Balsall Heath in Birmingham and the wider neighbourhood to promote education, recreation, and life-long learning. It works with children, young people, and adults, who are involved with the Trust in many different ways.

Through our partnership work with St Paul's Community Development Trust, we aim to promote inter-generational understanding between school pupils (aged 11-16) and older people living in our residential accommodation. Research has shown significant benefits to those in residential care, when bringing young people and older adults together.

Since September 2019, a small group of St Paul's pupils have visited our residential care home where they have taken part in activities with residents, learnt about each other's lives, helped serve drinks and have fun.



Sir Josiah Mason Trust has also been able to provide work experience to students and there is a range of opportunities, especially for those who have a particular interest in practical experience such as maintenance or catering. This weekly supervised work experience is invaluable and offers pupils a step up in their career goals. To compliment this, pupils have the opportunity to take part in a Dragons Den style grant scheme.

## Dragons Den

Two students - Jack and Jamie both took part in a 'Dragon's Den' presentation and were asked to come up with their ideal career and what they would need to get themselves career ready. Both students spoke very well, with confidence and were rewarded with the grant of £100 each!

## Jack's Story...



Above Above is Jack receiving his grant of £100 from David Healey

Jack wants to become a chef and has been working towards this for two years. During the presentation, Jack said that he needed to get himself looking like a chef with the hat, jacket, and apron so that he can feel comfortable in the kitchen when he goes to work. He also asked for a chopping board and a frying pan so that he can start to cook more at home. Jack was able to use his money to buy interview clothes; black trousers and a white shirt. St Paul's' have fed back that this has helped Jack to become more confident when he attends interviews. He used his clothes for the first time when he applied to Sir Josiah Mason Trust for a catering apprenticeship and was successful.

Since the interview, Jack has been preparing at home by creating delicious cakes for his Mother to try so that he can be ready to create scrumptious deserts in September for the residences and staff at Sir Josiah Mason Trust. We cannot wait to taste them...

## Jamie's Story...

Jamie has a keen interest in becoming a tradesman and has been working with Roger at Sir Josiah Mason Trust. Jamie used this opportunity to ask for a screwdriver set, work wear and a work jacket. Jamie has responded really well to Roger as his mentor and everyone at SJMT. He has helped to fix a number of things including a lock and a wheelchair.

Right - Jamie receiving his grant of £100 from David Healey



Both students did extremely well as it is not easy to plan and deliver a presentation in front of a small panel. We wish both students well in their careers - we have every confidence in them. Sir Josiah Mason trust is looking forward to working with St Paul's in the coming year

In summary, the Chief Executive of St Paul's, Dave Cusack's quote below really highlights the beneficial outcomes of such a positive partnership.

*“This partnership has inspired a number of our pupils to believe in themselves and recognise they have the talent to make a positive contribution in society. In addition, pupils have joined activities with residents that help bridge the generational gap. I want to thank SJMT for being prepared to believe in our pupils and giving them the confidence to succeed.”*

## Complaints & Compliments



As part of our duty of candour we believe that a healthy organisation is open and transparent about the all feedback it receives and values all feedback as an opportunity to learn and improve.

### Complaints

Between April 2019 and March 2020, we received 13 Complaints. Of these, 9 were upheld or partially upheld, this means that we agreed with the person's complaint and acted as a result of this.

	Property Issues	Staff Conduct	Other
Care Services		4	4
Housing Services	3		1
Head Office		1	

The highest number of complaints fell within care services (69%) staff conduct and other as follows:

- Residents hearing aids being lost.
- Residents belongings going missing in the care home.
- Query re need for training/care of a staff member Unhappy with behaviour of staff towards a resident.

The latter two complaints were investigated and not upheld.

## Care services other

- Three complaints were due to 'poor quality meals'
- One was a due to being denied access to a resident's care plan. This was not upheld as the resident had not given consent at the first request.

## Property Issues

We have seen a reduction in complaints in this area from 55% to 30% and attribute this to the completion of the Mason House refurbishment.

The following complaints were made;

- Unhappy with state of new flat upon moving in.
- Water damage/damp in flat.
- Decommissioned lift at Mason Court.

## Head Office

- One was in response to delays in obtaining residents' fund cash for a trip.

## Staff Conduct

- One complaint related to Head Office and was in relation to experiencing difficulties with finance staff when paying care fees.

Response timescales - all complaints 100% were investigated and the complainant informed of the outcome within the timescales we set to conclude an investigation (20 working days).

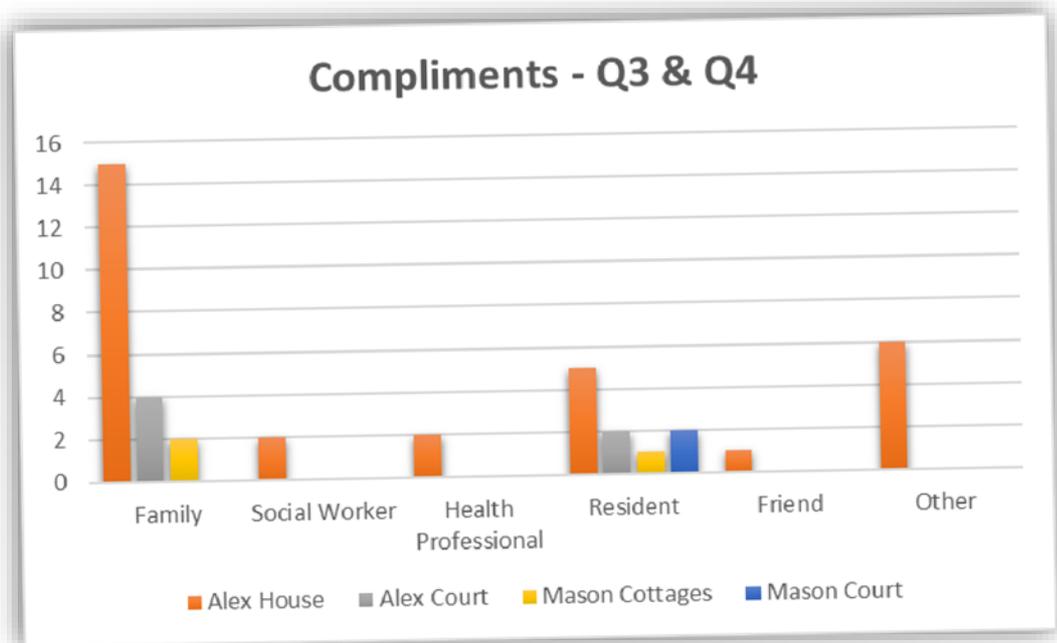
# Lessons Learnt

In 2019-2020 lessons learnt/action taken as a result of complaints include;

- Staff reminded to store hearing aids in left & right boxes in rooms going forward.
- Improved communication process for contacting families re urgent issues / valuables to placed in safe going forward.
- Staff to attend customer care training and review of payment methods the Trust offers customers.
- Process change re resident funds for trip - Resident Rep will request cash direct with Finance Dept.
  
- In relation to the new flat being in a poor state we offered a good will gesture (reduction in rent until Feb (20)
  
- Developed and implemented a Catering Services Manager role with a view to reviewing the whole service we offer residents in terms of increasing, flexibility, choice, and standards of meals.

# Compliments

In mid-2019 we began to formally record the compliments that each scheme received. We noted whom they were from and in regard to which area. In Quarters 3 & 4 we had a total of 42 compliments as per below:

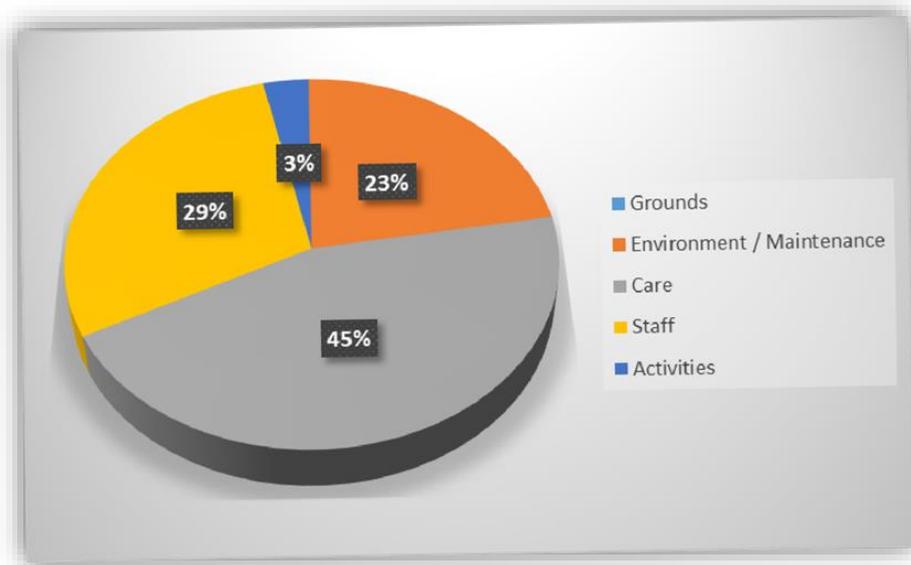


## Compliments per scheme and person

We can see that Alexandra House received the most compliments and that these were primarily from family members and residents.

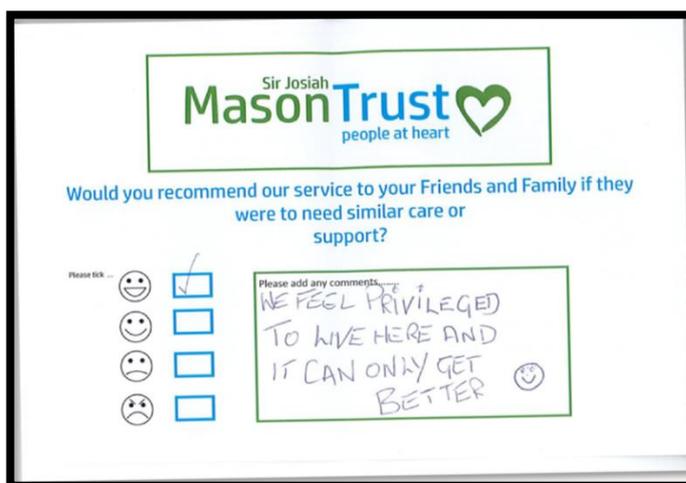
The compliments can be categorised into service area and as you will see below our 74% compliments are in relation to our care and staff.

### Compliments Subject



In addition to the above compliments we leave Family and Friend Test Cards and post boxes in each office and scheme. This encourages people to comment on our services as it is accessible but private and confidential. This appears to be working - during the last year we have had over 185 cards completed with a happy face.

Here are a selection of cards and comments which are a credit to the Sir Josiah Mason Trust staff.



Mason Cottages - October 2019



Would you recommend our service to your Friends and Family if they were to need similar care or support?

Please tick ...
 

<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Please add any comments.....

Definitely - Very friendly, caring environment - Staff are great!!! 😊

**Alexandra House - Jan 2020**



Would you recommend our service to your Friends and Family if they were to need similar care or support?

Please tick ...
 

<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Please add any comments.....

Definitely! After losing our dad, this has been the best, safest, happiest place mum could be in! All staff from management to cleaners are excellent - keep up the good work!

**Alexandra Court - Feb 2020**



Would you recommend our service to your Friends and Family if they were to need similar care or support?

Please tick ...
 

<input type="checkbox"/>
<input checked="" type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Please add any comments..... I enjoy living here - I feel safe and there is a good community spirit. Would recommend to family and friends.

**Jubilee Court July 2019**

# Our Strategic Priorities for 2020-2021

In the next year we plan to:

## Be a leading Provider

- 1.1 We will undertake an annual review of our attendance at local and regional forums, meetings, and events.
- 1.2 We will identify more opportunities to work collaboratively; developing a range of partnerships (including mergers & corporate trusteeship) that help us fulfil our vision and achieve positive outcomes for people in need
- 1.3 We will coordinate and chair the West Midlands Almshouse Meetings.

## To help more people

- 2.1 We will further develop our long-term expansion/modernisation plan for our Almshouse provision in order that we reflect the changing/future housing and care needs and aspirations of our clients.
- 2.2 We will commence a business case for phase 1 of the Olton site development.
- 2.3 We will consider opportunities to develop new services and opportunities across our region so that far more people affected by poverty, illness and disability are able to receive support, education, and assistance from the trust. (2020-2023).
- 2.4 To review our property management offer in order to acquire an additional 5-15 properties through partnering with local property owners who want to support a local charity and enable vulnerable local people in live in secure, quality accommodation. (2020-2023).
- 2.5 We will develop evidence-based services that support children and young people in need under the age of 25.
- 2.6 We will explore the development of an Alms provision for care leavers and for foster/adoptive families in need.

## To maintain financial sustainability and to grow

- 3.1 We will commence major donor fundraising, grant applications and procurement exercises that enable us to achieve our vision and strategic priorities and aim to generate circa 10% of our annual turnover.
- 3.2 We will review our existing investment portfolio to ensure we get best return on our investments.

## To be the best we can be

4.1 We will make greater use of technology to ensure increased awareness of our work, improve customer experience and client engagement and to achieve financial efficiencies across all service areas.

4.2 We will strive to achieve good or outstanding in our CQC ratings

4.3 We will achieve an improvement in customer service from 93% to 95%.

4.4 We will increase the opportunities for residents to be involved in services and support.

## To be an employer of choice

5.1 We will launch an Annual Staff Conference

5.2 We will work with staff representatives to identify how we best champion reward, recognition and well-being in our workplace and reduce out turnover to below 25% and sickness levels to less than 5 days per year

