



Making life better
for 150 years

A review of 2018 to 2019

Introduction

This report reflects on April 2018 to March 2019, a milestone year for the Trust, a year which was full of challenges, change and opportunities.

In 2018, we celebrated our 150th anniversary, a major achievement and a testimony to the legacy of Sir Josiah and the custodians of the charity that have continued his vision. In 2018, we also formed a new legal entity, an ambition we had held for many years and which has led to increased opportunities and greater protection.

In our Strategic Business Plan 'Building on Strong Foundations', we said that we want to be A Leading Provider. We have definitely increased the profile of the charity and entered a range of new partnerships and collaborations, including the launch of a joint Residents Scrutiny Panel, giving residents a far greater voice and influence in the way the Trust operates. Through working in partnership and raising our profile, we also welcomed a range of new opportunities and for the Trust to become corporate trustee of two new charities in July 2019. We have also continued to develop our relationship with local commissioners, leading to a 12 month hospital to home contract and the Trusted Assessor pilot which will launch in late 2019.

Two of our most ambitious Goals have been to 'Help More People' and 'To Maintain Financial Sustainability and to Grow'. In 2018-19, we undertook a significant amount of work towards helping us achieve this and we are now in a position to consider external grants and tender opportunities in order to expand our work to support more vulnerable people, including children and young people. The major development at Mason House also commenced last spring. This project has been extremely disruptive and challenging and has provided learning for the future, but it has led to 13 new units and improved facilities at Mason House.

We recognise that our workforce are one of our greatest assets and in the past year, we have worked extremely hard to ensure we recruit the right staff and that all staff understand and work to our values. We also appointed our own in-house Trainer who has enabled us to offer far greater personalised training to raise standards and knowledge.

Last year, we also took time to look at our Governance Structure in order to ensure that it reflects the changes that have occurred within the organisation. We believe that the new structure offers a far greater and more appropriate level of scrutiny and support to the senior team.

We hope that this report is really informative and that it lives up to some of our key Values, particularly 'Honesty', 'Excellence' and 'Innovation'. We believe that this report is an honest reflection of 2018-2019 and demonstrates our commitment to be 'transparent and accountable in all that we do' and that this will lead to us being able to provide an even higher level of 'quality services & support' and to be even more 'original and creative in our thinking'.



Julie Houlder
Chair



David Healey
Chief Executive

Some of our highlights this year...

We provided the following services



In 2018-2019, we provided...

A home to



Residential care to



Support or education to



What we achieved in 2018-2019

In early 2018, we set out our ambitions for the next five year period in our Strategy 'Building on Strong Foundations (2018-2023)'. Within the plan, we made a commitment to 5 Goals and in the first year, we have achieved a great deal. Some of our achievements are presented below:

To be a leading provider

- We organised a 'Housing in Later Life' Event at the Core in Solihull which was well supported by SMBC and other local housing providers.
- We completed a re-brand which led to the introduction of a new logo and branding guidelines.
- We redesigned and re-launched our website.
- We organised a successful Family Fun day at Olton in July 2018 to mark our 150th anniversary. This was well attended and included a visit from the Honourable Mayor of Solihull.
- We organised a number of historic talks/exhibitions at Birmingham Library with support from Birmingham Archives.
- We reviewed our attendance and presence at meetings/forums, to ensure we were well represented.
- We formed new partnerships with local Almshouses and the CEO was nominated as a Trustee of National Almshouse Association.
- We formed and launched a joint Residents Scrutiny Panel with three larger local Almshouse charities.
- We formed an extremely positive working relationship with Solihull MBC which led to new Contract/s and funding and reputation for the Trust



To be the best we can be

- We developed and launched an ambitious Service Improvement & Transformation Plan for Alexandra House
- We commenced a major review of our Policies & Procedures
- We completed a review of our Governance Structure and introduced a more effective structure
- We completed a review and legal restructure of the Trust, the first since the 1990's. This led us to become a Limited Company as well as a Charity.
- We introduced new internal meeting and communication structures (residents and staff)
- We developed a Trustee Induction Training Programme
- We implemented new processes and practices around GDPR

To help more people



- We completed a detailed options appraisal for consideration by Trustees which introduced a new model of care and a range of options for future developments.
- We commenced plans for the development of children and young people's services, a first for the Trust since the closure of the Orphanage.
- We commenced the redevelopment of Mason House which will lead to 13 new apartments
- We commenced discussions with two local Almshouse charities regarding the potential of us becoming corporate trustee.

To be an employer of choice

- We developed the following:
 - Values based training and workshops
 - Values based recruitment, supervision and appraisal
- Appointment of in house Trainer
- We introduced a new Property Services structure
- We undertook a review of the roles and responsibilities of the Senior Management Team and created the post of Director of Operations and Head of Central Services

To maintain financial stability & grow

- We completed plans to develop a new future/sustainable model of care for the Trust
- We secured additional funding for care services
- We became the chosen as a charity of the year for Birmingham PA Awards
- We continued to grow reserves & endowment for future investment in our services
- Funding secured for central heating at Mason Cottages, Jubilee Court & Ruth Patrick House



Housing Services

Residents Survey 2019

This year, we made the decision to use the National Star (Survey of tenants and residents) to collect the views and experiences of our residents. This Star was set up by House Mark, the UK housing sector's largest membership organisation, as a way of surveying customer perception and is used by over 350 housing providers, including other almshouse charities.



The Star enables us to:

- Measure customer satisfaction
- Benchmark our performance with others
- Assess trends over time.

The Star is comprised of various groups of questions and in this report, we share some of the key findings in the areas we asked residents about.

- We received a 42% response rate which we consider to be very good. Internal surveys typically receive a 30-40% response rate, whilst external surveys generate 10-15%.
- Jubilee Court and Mason Court had the best response rate.
- In no question did we receive below 60% in satisfaction.

Resident Satisfaction

As this is the first year we have undertaken the Star Survey, we are not yet able to compare our performance against previous years. Next year, we will be able to measure the change in satisfaction. We can however measure our performance against other smaller, similar Housing providers, as well as all Housing providers which includes larger Housing Associations.

We were delighted that our residents reported high levels of satisfaction, with an average of 93% satisfaction with overall service provided and similarly high levels of satisfaction with quality of home and neighbourhood as a place to live (97% and 96% respectively). Satisfaction with repairs was also high (96%) and value for money (VFM) provided by Maintenance Contribution (rent) (95%) and service charges (95%). This was all at a time of major disruption for residents at Mason House.

Compared against all providers, Sir Josiah Mason Trust reported higher levels of satisfaction in all of the core satisfaction measures. In Overall Satisfaction, we were 2% below the smaller providers like ourselves, but 3% above all Housing providers. **This is an area we would like to improve.**

	Satisfied or Very Satisfied	How we compare with...		
		Smaller Housing providers	All Housing providers	
Satisfaction with the overall service provided	93%	95%	90%	😐
Satisfaction with the overall quality of the home	97%	96%	94%	😊
Satisfaction with the value for money of rent	95%	94%	90%	😊
Satisfaction with the neighborhood as a place to live	96%	95%	92%	😊
Satisfaction with the value for money of service charges	95%	92%	82%	😊
Satisfaction with the repairs and maintenance service	96%	90%	87%	😊

Residents top three priorities

Residents told us that the three most important things to them (from a list of 11 priorities) are:



93% of residents were satisfied with the overall condition of their home

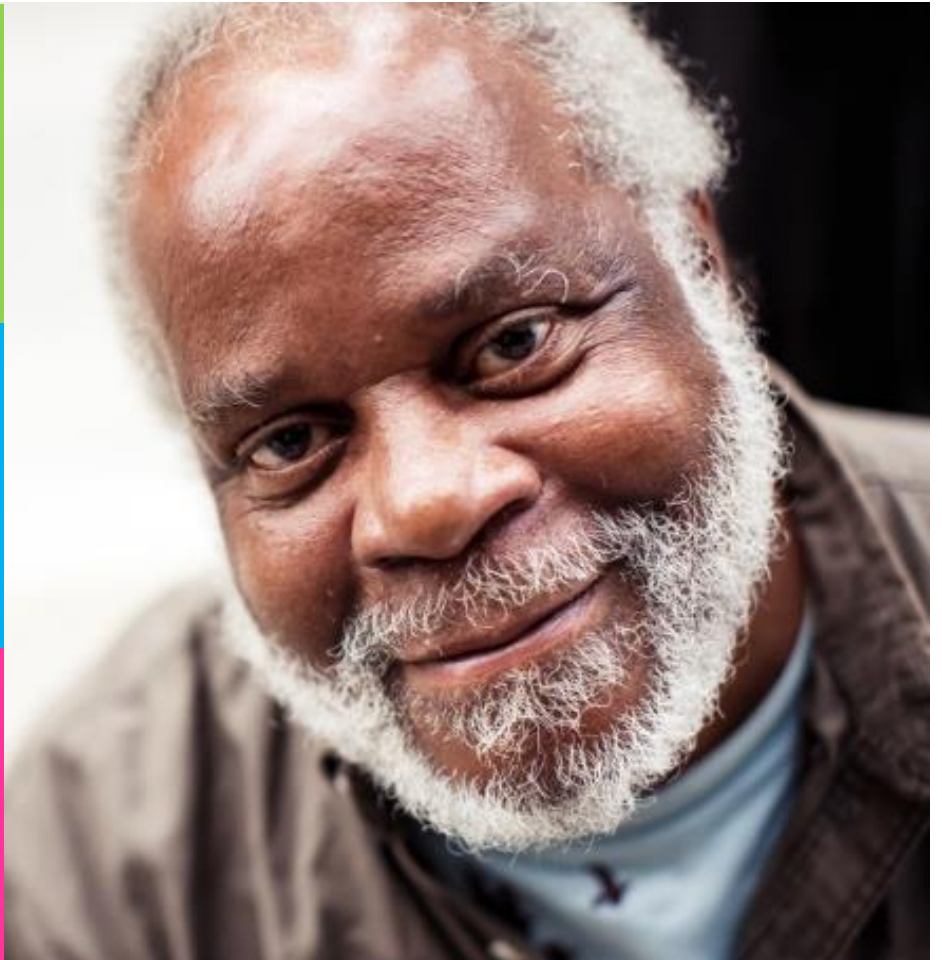
87% of residents said we were Good or Better at keeping them informed about things that might affect them as a resident

96% of residents were satisfied that we treat them fairly



91% of residents said that we provide an effective and efficient service

96% of residents said that we had friendly and approachable staff

97% of residents trust us as an organisation



Areas we could improve

-  To be better at keeping residents informed about things that might affect them.
-  To better understand the areas some residents didn't think we are as effective/efficient.

Advice & Support

89% of residents were satisfied with their Support Plan

92% of residents were satisfied with the services provided by their Scheme Manager




93% of residents were satisfied with the facilities at their scheme

100% of residents accessing benefits support were satisfied with this service

97% of residents were satisfied with the support they received when new to the service, but 24% did not access this kind of support

99% of residents were happy with support provided to vulnerable residents, but only 24% did not access this kind of support

Areas we could improve

-  To be better at creating Support Plans that satisfy the needs of residents.
-  To explore why people are not more satisfied with Scheme Managers' services.
-  To review the support we provide to new and vulnerable residents.



Responsive repairs

In total, 62% of residents had had a repair undertaken in the past 12 months. Of these:



96% were satisfied with the overall quality of work

85% of respondents were satisfied with the time taken before work started

100% were satisfied with the attitude of Workers

Areas we could improve







To improve the time it takes to commence works.





We also asked residents about Complaints. The findings of this part of the Survey can be found in the Complaints Section of this report.





Care Services





Residents Surveys 2019





The following results have been compiled from monthly Surveys completed by residents at Alexandra House. The format of reporting and recording was not introduced until the end of 2018-2019 and therefore, the results only reflect three months of feedback.





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
	74%	21%			5%	





Residents who feel that staff have listened to them	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	62%	38%				





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
	22%	32%			46%	





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
	36%	40%	8%		16%	





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
	26%	55%	5%		14%	





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
	61%	39%				

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
	30%	26%	5%		39%	

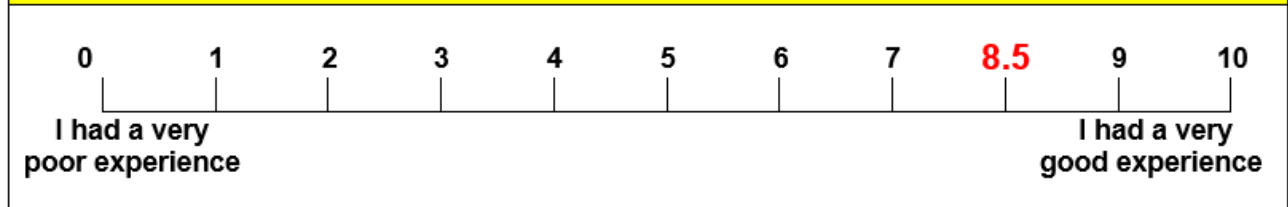
Residents who report that they feel comfortable in the building the service is located	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	68%	32%				

Residents who say staff have helped me to feel safe	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	68%	32%				

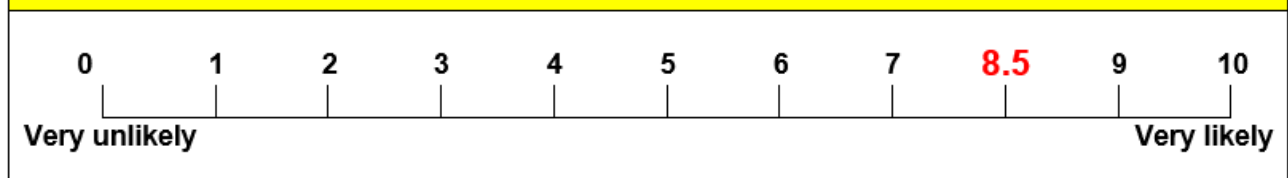
Residents who say they have been actively involved in the service activities	Strongly agree 	Agree 	Disagree 	Strongly disagree 	Does not apply	Prefer not to say
	29%	21%	17%		33%	

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
	88%	12%				




12. Overall... On average we scored.....



13. On a scale of 0 to 10, how likely are you to recommend Sir Josiah Mason Trust? On average we scored...



Areas we could improve

-  To provide residents with more relevant and sufficient information about the service.
-  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
-  To encourage and support residents to be more actively involved in activities and that the activities programme reflects a range of interests

Property Services

Responsive Repairs

In the 2019 Residents Survey, residents told us that Repairs and Maintenance was the most important priority to them.

The table below shows how we performed against our own timeframes for completing Emergency, Urgent and Routine Repairs. The statistics relate to all Housing and Care schemes. In total, we processed 1,719 repairs in the 12 month period and 98.38% 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	26	161	191	378
Jubilee Court	10	19	36	65
Mason House	70	130	123	323
Ruth Patrick House	7	21	41	69
Mason Cottages	29	128	195	352
Alexandra House	44	132	140	316
Alexandra Court	17	100	99	216
Totals	203	691	825	1,719
% of repairs completed within timescales	98.98%	97.11%	98.58%	98.38%

How we compare against other Smaller Housing Providers (2018)

Emergency repairs: other smaller Housing Associations achieved a performance percentage of 100%. We performed 1.02% below this, but our target is 100%.

All repairs: other smaller Housing Associations achieved a performance target of 97% for completion of all reactive repairs. We performed 1.38% above average.

Areas we could improve



To improve our response time to Emergency Repairs to 100%

Support to young people

Apprenticeships

In the year, we provided a placement to 4 young people in the following areas:

Administration | Decorating | Catering | Care

75% successfully completed their apprenticeship

50% found full time paid employment following completion

Academic Enrichment Programme

In 2018, we were continued to be the sole supporter of the Academic Enrichment Programme at the University of Birmingham which provides a residential, mentoring and study skills for Year 12 students.

- **110 students attended the 2018 residential activity** from 53 different schools and colleges.
- **95% had no parental history of Higher Education**
- **97% had a household income below £42,875**
- **84% came from a postcode in the bottom 40% by Index of Multiple Deprivation**
- **69% resided in areas with low youth progression to higher education.**

Of the 110 AEP students, data on A Level grades was obtained for 94 students (85%):

- **25% achieved AAB or higher;** and
- **34% achieved ABB or higher.**

Data obtained for 65% of participants (71) revealed:

- A high proportion of students (84%) progressed to higher education.



Complaints

Between April 2018 and March 2019, we received **11 Complaints**. Of these, **9 were upheld or partially upheld**, this means that we agreed with the person's complaint and took action as a result of this.

Complaints received by service area and type:

	Building works (Mason House)	Property issues	Staff conduct	Other
Care Services			3	
Housing Services	4	1	1	
Head Office			1	1

Housing Services

The highest number of complaints were received in Housing Services (55%). This was largely due to the Mason House extension (67%) which was extremely disruptive to residents.

The complaint regarding property issues was as a result of the decommissioned lift at Mason Court and staff conduct was due to a resident's perceived lack of support and a lack of adequate cover when a Scheme Manager was on leave.

Care Services

The three complaints in Care Services were in relation to staff conduct. These were due to 'standard of care delivered' by one employee, a 'medication administration error' by another and 'poor communication'.

Head Office

A total of 2 complaints related to Head Office. One was regarding poor communication and resolution in handing back resident's funds to Resident Representatives and the other was from a member of the public in regards to a former employee's employment with the Trust.

Response timescales

Of the 11 complaints received, 91% (10) were investigated and the complainant informed of the outcome within the timescales we set to conclude an investigation (20 working days). The complaint not resolved in this timescale was due to a member of staff leaving SJMT.

Other 'complaints' not included in this report

There were a number of complaints received and processed which have not been included in these figures. This is because they were actually complaints about neighbours' conduct and behaviour and should not have been processed as a complaint about the organisation and its employees.

Lessons learnt

We believe that a healthy organisation is open and transparent about the complaints it receives and sees all feedback as an opportunity to learn and improve.

In 2018-2019, lessons learnt/action taken as a result of complaints include:

- Staff training to individuals or teams in the following areas: best practice in care, medication training, communication training and customer service skills training

- A newly created Medication Policy
- Concerns expressed to external contractors and remedial works carried out to resolve issues
- Changes to a Job role to ensure cover during staff absences
- Resident activity money issues resolved and letter of apology issued
- Disciplinary action taken

Housing Residents Survey Findings

84% residents were aware of our Complaints Process

94% of residents felt that they could approach their scheme manager to raise a concern or complaint

13% of respondents reported that they had made a complaint in the past 12 months. This suggests that there is some misunderstanding in what a complaint is. This is supported by the work of the Residents Scrutiny Panel who identified that some residents believe reporting a maintenance job as a 'Complaint'.



To ensure that more residents are aware of how to make a complaint.



To help residents better understand what we consider to be a complaint.

Our strategic priorities for 2019-2020

In the next year, we plan to:

1. To be a leading provider

- 1.1 Complete the transfer of Holte & Bracebridge Charity and Holy Trinity Heath Town Almshouse Charity to the trusteeship of SJMT.
- 1.2 Seek new opportunities for working in collaboration and partnership with likeminded organisations.

2. To help more people

- 2.1 To complete a long term development plan for our sites
- 2.2 To launch pilot project for children and young people
- 2.3 To launch the Trusted Assessor Pilot project
- 2.4 To explore new funding opportunities to support people in need

3 To maintain financial sustainability and grow

- 3.1 To undertake a review of our investment strategy
- 3.2 To progress discussions re: potential future development and other potential development sites.
- 3.3 To seek funding to undertake improvements at Alexandra House
- 3.4 To further develop a sustainable future model of care for SJMT
- 3.5 To seek new funding opportunities that help us achieve our vision, mission and objects.

4 To be the best we can be

- 4.1 To complete the Transformation Plan in Care and work towards a Good CQC rating.
- 4.2 To review how we measure the outcomes we have helped people achieve and the difference we make.
- 4.3 To provide more opportunities for the people who access our services to have a say in how they are developed & how they are run.
- 4.4 To review our Policies and practices to ensure that all we do promotes and recognises the value that equality and diversity bring to our organisation.

5 To be an employer of choice

- 5.1 To work with staff to identify how we can best champion reward, recognition and wellbeing in our workplace
- 5.2 To launch a staff Forum
- 5.2 To deliver our first Staff Conference



Areas you have told us where we could improve

1. To be better at keeping Housing residents informed about things that might affect them.

What we will do

- a. Residents meetings to be moved from quarterly to monthly
- b. New surgeries to be introduced for Property and Finance/Benefits.
- c. Trust Times Newsletter relaunched and published quarterly rather than 6 monthly
- d. To introduce quarterly meetings between Resident Representatives, 2 Trustees and the CEO (Connect)

2. To better understand the areas some Housing residents didn't think we are effective or efficient.

What we will do

- a. To introduce Friends and Family Test at all sites in order to track performance.
- b. To introduce an Integrated Governance Group which will monitor and react to feedback and performance concerns.
- c. To undertake a major review of our operational Policies and Procedures.

3. To be better at creating Support Plans that satisfy the needs of Housing residents.

What we will do

- a. To review our Support Planning processes and paperwork to ensure that we adopt a more personalized and strength based approach to supporting residents.
- b. To provide additional training and support and to ensure that staff provide appropriate support to all residents.

4. To explore why people are not more satisfied with Scheme Managers' services.

What we will do

- a. To undertake an interim review of the role of Scheme Managers.
- b. To explore training and support provided to Scheme Managers.
- c. To review Housing Management processes and paperwork.

5. To review the support we provide to new and vulnerable residents in Housing Services.

What we will do

- a. To review the Residents Handbook in partnership with Resident Representatives
- b. To introduce Resident Welcome Packs at all schemes.
- c. See point 3

6. To provide Care residents with more relevant and sufficient information about the service.

What we will do

- a. To review and produce a new Care Brochure
- b. To produce standard information about the service and care in every resident's room (including resident friendly guides)

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

What we
will do

- a. To review and introduce new Care Planning Paperwork
- b. To ensure that all staff are appropriately trained in providing person centred/asset based care.

8. To encourage and support residents to be more actively involved in activities and that the activities programme reflects a range of interests

What we
will do

- a. To review current offer and to develop a new varied programme of activities
- b. To seek grant funding and form new partnerships to increase greater diversity in activities
- c. To create and recruit volunteer Befrienders

9. To improve the time it takes to commence repair works.

What we
will do

- a. To review the Property Services Team.

10. To improve our response time to Emergency Repairs to 100%

What we
will do

- a. To review the Property Services Team.

11. To ensure that more residents are aware of how to make a complaint.

What we
will do

- a. To work with the Residents Scrutiny Panel and residents to review and relaunch a new process for providing feedback, including complaints.
- b. To ensure that all residents are provided with information on how to provide feedback.

12. To help residents better understand what we consider to be a complaint.

What we
will do

- a. To work with the Residents Scrutiny Panel and residents to review and relaunch a new process for providing feedback, including complaints.