



# PROVIDING HOMES BUILDING COMMUNITIES

Our Strategic Business Plan

2023 - 2028

**SJMT**   
people at heart



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# ABOUT SJMT

We are SJMT: a family of charities that strive to improve lives and create opportunities by providing quality homes, care, support, and education.

The services we provide include:

- Safe, affordable and well-maintained alms-housing
- Residential and extra care
- Community and housing related support
- Services to advance the opportunities of children and young people in need

Everything we do is rooted in our 370 year history and driven by our vision for the future. SJMT is made up of six separate charities governed by one board of trustees. We are also a Housing Association registered with Homes England and our care services are CQC registered.



Brian Burke | Chair



David Healey | CEO

# OUR VISION MISSION & VALUES

## Our Vision

A future where all people have a great place to call home, are part of a thriving community and have opportunities to achieve their potential.

## Our Mission

Our family of charities strive to improve lives and create opportunities by providing quality homes, care, support, and education.

## Our Values

- **Honesty:** we are transparent and accountable in all that we do.
- **Innovation:** we are original, creative, and future focused.
- **Inclusivity:** we believe everyone should have the same opportunities no matter their differences.
- **Personalised:** we believe that no two people are the same and we treat everyone with dignity.
- **Fun:** we want to be a great place to work and receive support.
- **Excellence:** we want to be recognised for providing quality services & support.

# WHAT WE'VE ACHIEVED

We achieved a lot during our last 5 year Strategy period (2018-2023). Here are just some highlights...

Introduced a new legal & governance structure to ensure we are better governed

We welcomed 4 new charities to our family

Increased the homes we provide by 35%

Transformed our care home Alexandra House, leading to a CQC rating of Good in all areas

Launched an award winning Resident Scrutiny Panel

Returned to the direct delivery of services for children and young people after a 60-year gap



Won the tender to provide the Trusted Assessor pilot in Solihull

Won the tender to provide the Homelessness Floating Support Service to adults in Solihull



Launched a Staff Forum and adopted the Mindful Employer 'Charter for Employers Positive about Mental Health'

Became ISO 9001 Quality Management System Accredited

Signed up to the Disability Confident Scheme, HouseProud LGBTQ Housing Pledge and National Care Leavers Covenant

Supported hundreds of vulnerable people during the Covid-19 pandemic

Improved our maintenance offer to residents

Restructured our Housing Support Services to increase support to our most vulnerable residents

Supported the University of Birmingham Academic Enrichment Programme

Digital Transformation Programme

Representation regionally & nationally within housing & social care sector

Installed new heating systems in 52 of our homes as part of a government programme

# STRATEGY PLANNING PROCESS

OVER THE PAST 12 MONTHS, WE HAVE BEEN BUSY TALKING AND LISTENING TO ALL OF OUR STAKEHOLDERS. THIS PROCESS HAS ENABLED US TO REFLECT AND REFINE OUR THOUGHTS AND LED TO THIS STRATEGY.



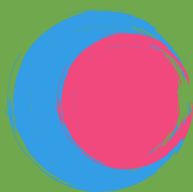
## PHASE ONE | RESEARCH

Desktop research and consultation planning.



## PHASE TWO | EXPLORE

Internal focussed consultation with Trustees, Staff Forum & Residents Forum. Informal discussions with key partners & Commissioners.



## PHASE THREE | DRAFT FIRST STRATEGY

A first Draft Strategy is written in consultation with Chair and Leadership Team.



## PHASE FOUR | WIDER CONSULTATION

Public consultation on the high-level goals and outcomes. Survey sent to all residents, staff and partners as well as public via Social Media.



## PHASE FIVE | REFINE

Review consultation feedback and write final Draft Strategy.



## PHASE SIX | Final Trustee scrutiny & adoption



# OUR STRATEGIC GOALS

THE MAIN THINGS WE WOULD LIKE TO ACHIEVE OVER THE NEXT 5 YEARS



To be a great place to work



To be the best we can be



To provide homes for the future



To create opportunities that help people to achieve their potential and thrive



To increase the services and support we provide to children and young people

# TO BE A GREAT PLACE TO WORK

Our staff and volunteers are one of our greatest assets and recruiting and retaining staff has become a challenge for most sectors across the UK with turnover in the social care sector being around 31%. We want to make sure that we attract and keep the best staff and better recognise the valuable contribution of and increase the opportunities for people to volunteer with us.

We will...

- Reduce staff turnover to 20% across the Trust through a range of 'employer of choice' initiatives.



- Adopt the real living wage.
- Create and promote a clear career progression programme.
- Launch an active volunteering and work experience programme.
- Create a diverse, inclusive and informed workforce and culture.

# TO BE THE BEST WE CAN BE CORPORATE, SOCIAL & ENVIRONMENTAL

We strive for excellence in all that we do and during the past 5 years, we have committed to a range of quality standards and pledges and developed internal improvement plans to help us continually improve. We know that in the coming years, it is essential that we catch up and excel in reducing our environmental impact as well as better demonstrating our social impact. We also want to be better at describing who we are and why we are different as well as increasing our influence within the housing and social care sector.

## We will...

- Develop a 'Go Green Strategy' which sets out our commitment to environmental sustainability & improved affordability for our residents & the Trust.
- Measure and report our social impact (the effect on people and communities that happens as a result of our action/activities).



- Review our brand.
- Extend our influence within our sector at a local and national level.



# TO PROVIDE HOMES FOR THE FUTURE

The oldest charity in our family has been providing homes since 1650, and today we are one of the largest Almshouse charities in the UK. However, we know that people's needs and wants are changing and many older people want to 'age in place' and have a home that can adapt as their needs change, rather than move to a more specialist environment. Many of our homes are ageing and are not equipped to meet the needs of future generations of older people and we know that we need to begin a programme of remodelling and replacing our homes with homes and communities of the future.

We will...

- Develop and maintain an active asset management programme, including a rolling 20-year plan to remodel, divest or improve our housing stock to ensure that our homes continue to be in demand and fit for purpose.
- Replace a min of 10 existing homes and build 62 new homes during the life of the strategy.



- To extend our family of charities by becoming corporate trustee of housing charities that are at risk of dissolution or takeover; protecting their unique identity, whilst enabling us to ensure that the homes/sites they provide are fit for the future.

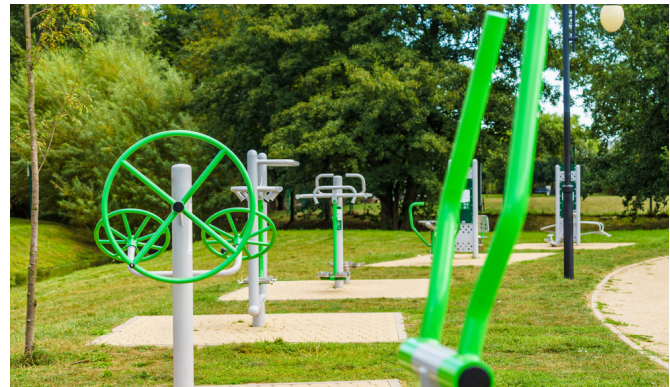
# TO CREATE OPPORTUNITIES THAT HELP PEOPLE TO ACHIEVE THEIR POTENTIAL AND THRIVE

Part of our Vision is of a future where all people are part of a thriving community and have opportunities to achieve their full potential.

We really welcome this Goal this year and we believe that this will help us towards achieving our Vision.

We will...

- Grow the support, we offer to people through Technology & Enabled Care Services.
- Develop opportunities for our residents/clients to participate in our volunteering and work experience programme, including a Peer Mentoring Project for our new residents and an intergenerational buddying programme.
- Make better use of our buildings and grounds, creating green spaces that encourage exercise and community cohesion.
- Appoint a Community Fundraiser who will generate c£250,000 towards our initiatives during the life of the Strategy.
- Expand the housing and support we provide to working age adults through relevant grant/tender activity, partnerships and/or investment in the development of intergenerational communities.
- To reduce barriers (real or perceived) to accessing our services.



# TO INCREASE THE SERVICES AND SUPPORT WE PROVIDE TO CHILDREN AND YOUNG PEOPLE

Our Trust was founded on the opening of our orphanage in Erdington. It was Sir Josiah's instruction that his Trust should go on to support more young people and left us with some resources to do this (now our Relief in Need Charity). In 2021, we launched our exciting plans to directly support young people once more and in the next 5 years, this will come to fruition during this Strategy.

We will...

- Build a minimum of 6 brand new one-bedroom apartments (almshouses) for young people from Birmingham & Solihull who are care leavers or young people who are homeless or at risk of becoming homeless.
- Create and pilot two training flats for young people.



- Launch a brand new community based support service for young people aged 13-25 who are in care or care experienced and not engaged or at risk of not being engaged in education, employment or training who need support to help them navigate the world of: education, employment, training, business start-up and skills development.





# SJMT

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SJMT (Sir Josiah Mason Trust) is a Registered Charity, a Registered Housing Association and a Company Limited by Guarantee. Charity Number: 1179890. Company Number: 11416213

Our family of charities include: Sir Josiah Mason's Almshouse Charity, Sir Josiah Mason's Care Charity, Sir Josiah Mason's Relief in Need & Education Charity, Holte & Bracebridge Charity, Holy Trinity Heath Town Almshouse Charity, Thomas Banks Almshouses, & Oak Tree House Trust.

