

Research Strategy

2020-2023



1920 **100 Years** 2020

St Monica Trust

Working to ensure we have robust information helping us to understand:

What **difference** are we making?

How could we do **better?**



Is what we are doing **working?**

How well are we **preparing** for the future?

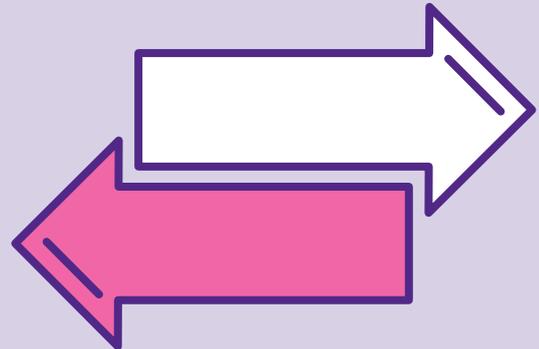
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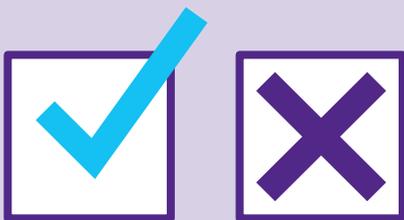
Our research provides us with robust...



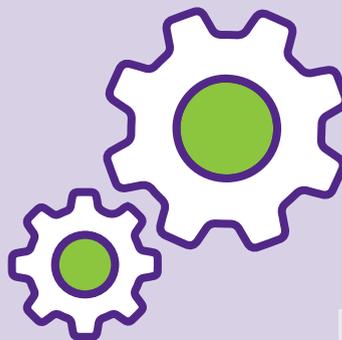
...evidence and understanding of the difference we are making.



...information about what matters to our current and future customers.



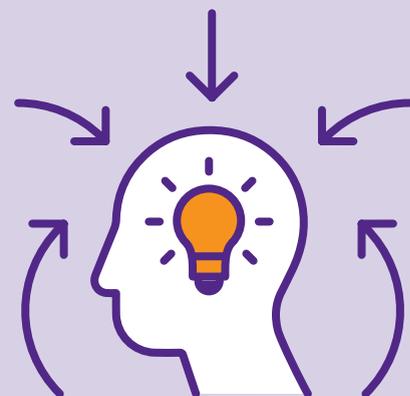
...knowledge of the needs, views and preferences of our customers, staff, volunteers and other stakeholders.



...understanding of how well different aspects of our organisation are functioning - as well as where and how improvements could be made.



...insight into whether projects or changes have been successful.



...valuable external knowledge.

1 Summary

The next three years will see research expertise and activity continuing to fulfil a major role for the Trust. This will include a range of activities to further improve our understanding of our customers, organisation, what is going well and what could be improved.

Our research work involves sourcing, creating, and disseminating important evidence relating to our customers' and beneficiaries' lives. It also contributes to creating, harnessing and supporting new ideas, trialling innovations, and addressing gaps in knowledge in areas important for our stakeholders.

We will continue to develop our social impact evaluation and reporting framework, further building on the benchmarking work carried out during 2018/2019. This will help us ensure that our charitable expenditure is providing maximum impact in terms of individual and community well-being.

We will further realise our ambitions for research by:

- Continuing and developing our in-depth engagement with stakeholders.
- Using user-centred design methodology to realise our new service and development initiatives.
- Increasing awareness, and providing support for evidence-informed practice within the Trust.
- Finding out what works to enhance quality of life for different residents, customers and staff by strengthening internal evaluation, seeking new knowledge

and learning from research findings, as well as best practice from elsewhere.

- Augmenting our measurement, understanding and awareness of the outcomes and social impact being achieved by what we do.
- Increasing our investment in valuable, high-quality evaluation of our services, support and facilities.
- Ensuring all research carried out by us - or by others with our customers, staff or volunteers - adheres to high quality standards of practice and is conducted within contextually appropriate ethical and scientific guidelines.
- Carrying out research projects focusing on aspects and areas we have identified as having potential to increase the effectiveness of our business the most.
- Seeking funding opportunities to enable us to conduct and deliver important research that will benefit our stakeholders, as well as local populations and others further afield.

We are committed to engaging customers in the development and delivery of research in the most beneficial way. We will continue to actively engage with and listen to our customers, including looking to capture their views for our research priorities and activities.

Our commitment to actively supporting the production and use of research will continue to grow through our work and partnerships with a wide range of external colleagues, researchers and experts.

The monitoring and evaluation of the impact of our research work, its outputs and outcomes, will be reported through different channels appropriate for our multi-stakeholder audiences.

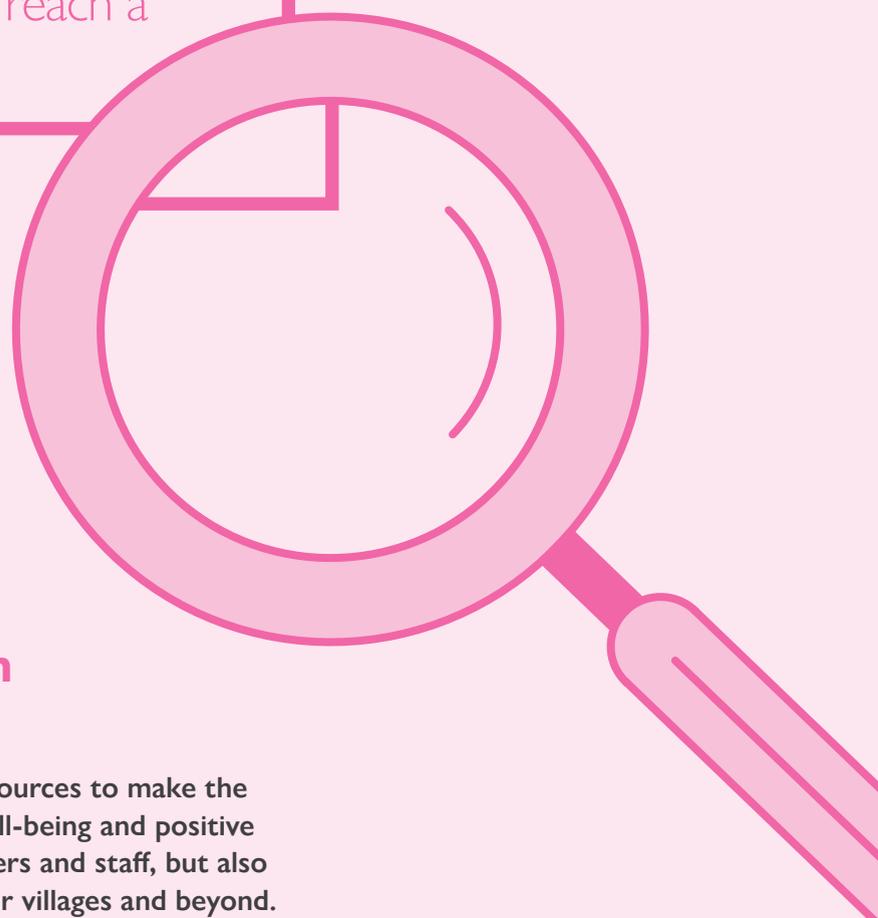
2 Introduction

Research is the use of **rigorous and systematic** investigation in order to discover new facts or information, provide robust evidence, or reach a new understanding.

The importance of research to our work

We will continue to commit our charitable resources to make the most positive difference to enabling health, well-being and positive ageing – particularly for our residents, customers and staff, but also for people living in the communities around our villages and beyond.

Using research and evidence to inform our practice is an essential factor in helping us achieve this, together with continuous improvement, innovation, working in collaboration with others and being able to contribute to influencing excellence in our field.



What research does for us

Research helps the St Monica Trust to work more intelligently and responsively

It helps us understand whether what we are doing is working and enables us to demonstrate this to others. It can also greatly enhance the Trust's ability to effectively respond to changing needs, opportunities and expectations.

Research is critical for enabling us to use our preferred approaches to work

Our work principles

Our decisions are based on strong evidence of people's needs, wants and preferences.

We design our environments, facilities and services to fit what matters to people and their local community.

We recognise and embrace the power of collaboration.

We strive for an in-depth understanding of what makes better older lives, now and in the future.

Wherever possible we use holistic, whole community approaches.

We focus on and promote positive ageing for all ages.

We listen, respond and demonstrate our understanding of customers' experiences, their views, needs and preferences.

A **strong research capability** in the organisation is important for enabling and supporting:

- The broadening and deepening of our knowledge.
- Access to and use of the best evidence to achieve effective practice and decision-making.
- The successful embedding of good practice across services.
- Our understanding of customer's experiences, their views, needs and preferences.
- Growth in the positive difference we can make for our customers, local communities and our staff in key areas such as improvements in well-being.
- Our understanding of the impact of what we do and the services and living environments we provide.
- Worthwhile innovation along with assessment of new initiatives.
- Maximisation of the Trust's effectiveness and ability to ensure value for money.

Disseminating, learning and sharing the findings

from our internal research helps to increase awareness about what we do, what we have learned and the outcomes experienced by our customers. It can provide valuable information and evidence to a wide range of audiences regarding our services, villages and homes, such as:

- What difference they make.
- What works well and not so well, and for whom.
- What our residents and customers think of them and ways they could be improved.
- The extent of evidence-informed practice.
- How well prepared they are for the future.

Advantages of undertaking and collaborating in research include:

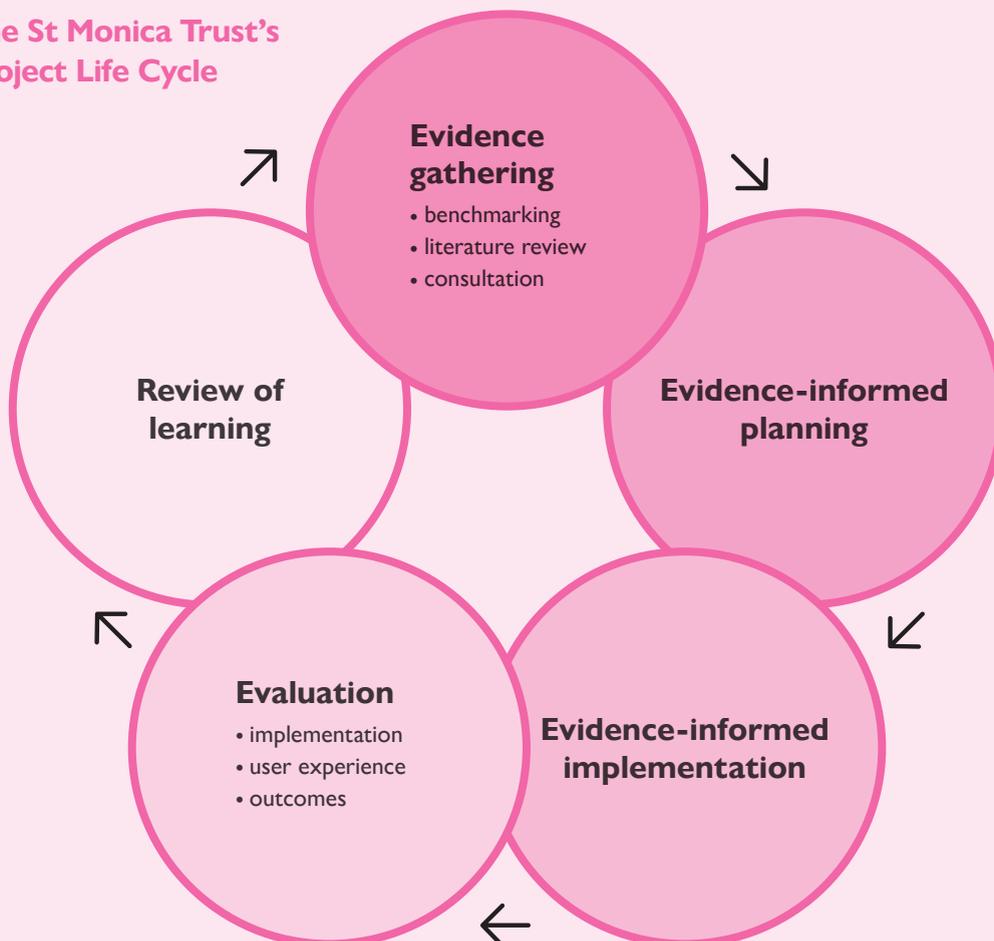
- Giving us a strong voice and the ability to contribute and influence from a position of sound insight, awareness and understanding.
- Enabling us to positively impact more people's lives through the sharing of our learning and findings.
- Increasing the profile of the organisation and its value and efficacy.
- Opening up new partnership working opportunities.
- Helping to attract new customers, volunteers and high quality staff to the Trust, as well as people looking for collaborators for research initiatives and events.

Research and evidence are core elements of the Trust's project life cycle.

Our project development model is strongly rooted in user-centred design and has the needs, views and experiences of the customer very much at its heart. The cyclical process involves seeking, understanding and acting on relevant high quality evidence.

The diagram below shows the key processes in the cycle - evidence gathering, planning, implementation, evaluation and learning. Large projects and initiatives will often involve staff working in close collaboration across different directorates, each having responsibilities for particular processes in the life cycle.

The St Monica Trust's Project Life Cycle





Audiences and partners

Key audiences for the outputs of our research are:

- Our residents, customers and their family or friends.
- Our staff, committee members, Trustees and volunteers.
- External staff working with our customers and in our localities, such as district nurses, GPs, NHS and ambulance staff.
- Scrutiny bodies such as the Care Quality Commission (CQC)¹ and Charity Commission.
- People looking for a service or new home - for themselves, a loved one, or for a patient/customer.

- External colleagues working with us on joint initiatives, e.g. architects developing a new village or university researchers undertaking projects with us.
- Organisations providing services for the Trust or the Trust's suppliers.
- People who are working, or are interested in housing, health, care, older people, health promotion and hospitality services.
- Researchers and other people interested in the areas in which we work.

Collaborative research

We are passionate about sharing expertise, being able to contribute to the expansion of knowledge or understanding and being able to positively affect as many people as possible.

We work with many colleagues from other organisations to share knowledge and

learning and to conduct research projects, particularly when combined expertise, resources and collaborative working can provide additional benefits and shared value.

For example: we work with university colleagues to develop research funding bids; work on joint research projects with external academics and organisations; are members of research steering and networking groups; contribute to calls for evidence.

Where possible, we also welcome and facilitate others to work with our staff, residents, customers or volunteers as part of their own research studies. This might be, for example, university researchers looking to interview older people living in care or retirement settings to gain insight into their experiences, or we might provide a research study topic or a co-supervisor for MSc and PhD students.

Research undertaken at the St Monica Trust

All our managers gather data and information relating to service provision, outcomes and stakeholder well-being on an ongoing basis. Services undertake or facilitate regular evaluations of their impact in collaboration with our Research and Intelligence (R&I) team. In addition, a number of front-line and support staff will be carrying out research as part of their regular work and training requirements, usually in the form of information searching, synthesis, consultation and evaluation activities. Many services are also involved in a range of partnership projects with external researchers. Occasionally the Trust will commission external partners to do particular pieces of research work.

Central research and intelligence activities

The St Monica Trust R&I team is a reflection of the strength of our commitment to evidence based practice. They work closely and collaboratively across the organisation with managers, front-line staff, residents, customers and other key stakeholders.

The R&I team provide in-house research and information services dedicated to increasing the quantity and quality of evidence that we create, have access to and use.

The central activities undertaken by the R&I team for the organisation are:

- Evaluation activities, including measurement of outcomes and impact.
- Important research projects.
- Research funding bids.
- Production of evidence reviews, best practice overviews and published research papers.
- Information dissemination and exchange, both internally and externally.
- Promotion and facilitation of evidence-informed practice.

- Support with service development.
- Provision of research/evaluation support to staff and project groups.
- Stakeholder engagement and consultation, including running our annual customer satisfaction surveys.
- Our annual social impact report.

The R&I team incorporates a wide variety of quantitative and qualitative research methods. This includes leading on developing 'Theories of Change' for our initiatives and services - a method for working in collaboration with others to succinctly establish an evidence-based realistic 'blueprint' for how a service initiative works. A Theory of Change predicts the likely effects and outcomes of an initiative and helps identify the important aspects to evaluate. 'Appreciative Inquiry' is another collaborative engagement technique used by the R&I team where there is a goal to effectively bring about change. This specifically engages with stakeholders in a way that focuses on strengths rather than weaknesses.

The R&I team also **collaborate with external partners on joint initiatives**, such as funding bids, research projects and events, as well as contributing to specialist advisory boards, networks and research groups. Recent joint research project funding bids with universities have been in the areas of robotics, assistive technology, recruitment systems for care workers, dementia and intergenerational initiatives.

The head of the R&I team provides **the Trust's own research governance and ethical review services**, which have been developed to align with the RESPECT Code of Practice for Socio-Economic Research² and the British Social Research Association's Ethics Guidelines³. The process includes discussions with a reference group and, for more complex projects, consultation with expert panels, which can be made up of staff, residents and customers.

Organisational development and transformation

Much of our organisational development and transformation work incorporates important

research elements such as intelligence gathering, interpretation and consultation with stakeholders. Activities include:

- Facilitation of continuous improvement.
- Research into new models and ways of working that align to the Trust's vision and strategy, leading to the creation of new services and partnerships.
- Customer journey mapping.
- Performance reviews of aspects of the business, including identifying improvement areas and facilitating the implementation of enhanced or new operating models.
- Customer experience transformation.
- Production and promotion of 'lessons learned' based on reviews of projects and new developments.

Human resources intelligence

Human resources intelligence - gathering evidence which helps us to understand our staff, volunteers, staffing requirements, working culture and working environments - is hugely important for our business and for the well-being of our customers, staff and volunteers.

The main research activities undertaken in this area are:

- Measurement of volunteer and staff satisfaction and cultural change through regular surveys.
- Regular colleague consultation.
- Human resources data analysis and reporting.
- Information collation, synthesis and interpretation, particularly in areas relating to staffing, culture, well-being and recruitment.

¹ The CQC monitors, inspects and regulates health and social care services.

² http://www.respectproject.org/code/respect_code.pdf

³ <http://the-sra.org.uk/common/Uploaded%20files/ethical%20guidelines%202003.pdf>

Recent collaborations with external partners

Each year the St Monica Trust partners with a range of organisations, academic institutions and consultants on research funding bids and research projects. When external researchers submit proposals to us to invite our staff or customers to participate in their research project, the R&I team provide a *research governance and liaison service* for the Trust.

A selection of research projects

Exploring the role of volunteers in care settings for older people University of Bristol

Stockwood Community in Transition Bristol Ageing Better

ACE Neighbours in Hartcliffe and Withywood funded by LinkAge and evaluated by the University of Birmingham

ACE Neighbours in Filwood and Lawrence Hill (part of Bristol City Council's "Tackling Inactivity in 3 Key Wards" project) funded by Sport England and evaluated by the University of Gloucester

Falls prevention 'Staying Steady' researched and evaluated by the University of the West of England on behalf of Bristol City Council Public Health

Impact of assistive technology as an early warning sign of distress for people with dementia led by the University of the West of England

REACT RETirement in ACTION led by the University of Bath

Examples of research funding bids

Systematic review of intergenerational research literature led by the University of East Anglia

Innovations that engage children and young people improving the lives of older people needing social care led by the University of Worcester

The co-production of video-mediated communication technology to support the social connectedness of people living with dementia led by the University of Oxford

Digitally-enhanced Healthcare Credential Assurance led by the University of the West of England

Promoting independence among older people, people with disability and people with impairments led by MORI

3 Our research strategy

The vision

To undertake and collaborate on high quality research activity that strengthens our understanding and practice, contributes to continuous improvement and maximises the positive impact we can have on individuals, communities and the wider environment.

Strong links to the St Monica Trust’s mission and values

The strategy centres on helping us to improve the lives of older people in and around our villages and on promoting the use of evidence for the benefit of all.



Our research work is essential for helping us to live our values

We are people people

We build communities for life where everyone can contribute.

We create environments and services in which people are valued, included and respected.

We are caring

Our legacy of compassion remains our central focus.

We care about everything that affects people’s lives.

We are honest

We are open, we communicate clearly.

We ask questions and we listen, so that everyone’s voice is heard.

We are responsive

We adapt to changing times and individual needs.

We offer choice and take every opportunity to improve and enrich people’s lives.

We are inspirational

We continuously learn, innovate, grow and improve.

We influence excellence in our field.

We are dedicated

We are proud to commit our charitable resources to get the best results possible for residents, customers and the wider community.

Priority research areas

The priority areas for research and evaluation work at the Trust are shown below. They have been selected for having the most potential to positively impact our work and the health, well-being and satisfaction of our customers and staff. The areas are strategically important for the continuing successful development of our organisation and all planned research work will encompass one or more of these.

Our research priorities

Measuring and demonstrating our impact

How to measure, understand, use and communicate the difference we are making to others – how we benefit individuals, communities, wider society and the environment in which we live and work.

Community well-being and resilience

Includes:

- Community integration, e.g. shared resources, skills, spaces.
- Social and intergenerational opportunities.
- Compassionate and dementia-friendly communities.
- Ability to withstand, adapt to and recover from adversity.

Place-shaping and healthy place-shaping

‘Healthy place-shaping’ is a collaborative process harnessing resources to create sustainable, well-designed areas, buildings and communities which:

- Provide a sense of belonging, safety, identity and community.
- Foster healthy opportunities, behaviours and environments.

Individual well-being and resilience

Includes:

- Physical, mental, emotional, spiritual and financial well-being.
- Positive and healthy ageing.
- Having a sense of fulfilment, being valued, belonging, dignity and a support network.

Research governance

Having processes in place for:

- Ensuring high standards and quality for research.
- Protecting the rights, dignity, safety and well-being of those involved - could be residents, customers, families, our staff or external researchers.

Includes:

- Ethics.
- Relevance and usefulness of the research.
- Appropriateness of methods being proposed.
- Timetable and any resource implications of the research.

Assistive technology and robotics

Technology to:

- Aid and support our staff in their work.
- Increase the quality of life of our residents.
- Save staff time and help with future carer shortages.
- Help with monitoring and evaluation. e.g. virtual reality; telehealth; sensors; apps for healthful behaviour motivation; communication support; self-help strategies; appointment/event reminders.

Strategy aims, objectives and actions

Aims

Our research strategy has the Trust's overall strategic aims as its foundation:



Overall objectives

This strategy specifically incorporates the following strategic objectives for which research has a vital contribution.

We will:

- Deal honestly with our residents and customers, understanding their perspective and securing their loyalty and trust by providing outstanding choice, value and service.
- Partner with residents and customers, offering them a real voice in both the service they receive and the future development of the Trust.
- Be actively involved in the building and maintenance of supportive and enriching communities.
- Position the organisation as a local, regional and national influencer in terms of the provision of services for older people.

- Develop and enhance our use of technology across the organisation to improve the customer and staff experience.

Further objectives for work under our research strategy are to:

- Strengthen and augment evaluation activities and outcomes measurement across the Trust.
- Provide in-house research and evaluation expertise.
- Increase our research capacity using volunteers with appropriate skills, knowledge and interests.
- Increase the uptake of evidence-based innovations, interventions and practices by staff.

- Further strengthen the co-ordination of research activities at the Trust and the process of governing research conducted by or within the Trust, to ensure it is of high quality.

- Increase awareness of our research activities and findings derived by them.
- Promote knowledge exchange both internally and externally to help increase the understanding and application of research findings into practice.
- Continue with emphasis on collaboration so that: (a) our resources, knowledge and expertise can be shared and can benefit more older people; and (b) we are able to achieve more through partnership working, which can effectively widen knowledge, expertise, capacity and capability.

Overview of key actions

We will:

- Continue to run and report on **our regular satisfaction and experience surveys** including those for our staff, volunteers, village and care home residents, respite service users, Care at Home customers, Community Connections and Community Giving beneficiaries.
- Further the **measurement and awareness of the impact of the Trust's work** on residents, users, staff and other beneficiaries, using the evidence collected to produce an **annual social impact report** for the Trust, including:
 - continuing work with the development and implementation of the evaluation framework developed by the R&I team for Community Impact.
 - undertaking an evaluation of the impact of The Chocolate Quarter community spaces.
 - increasing colleague engagement by celebrating and **communicating the unique contribution we make** in improving the lives of older people's communities across the region.
- Carry out **specialist research projects** and submit research funding bids, in identified priority areas such as assistive technology.
- Collaborate in, run **pilots or evaluations of initiatives** that show good promise for enhancing the well-being of our stakeholders.
- **Provide evidence from research** to help with the development or improvement of services, buildings, enriched communities.
- Contribute to the **development of our assistive technology strategy** providing insight from internal and external research findings.
- Continue with a range of **market research activities** which provide essential insight for new concepts and developments.
- Increase opportunities for **customer engagement and collaboration** at each stage of the research development and implementation processes, including exploring setting up a **research volunteering initiative and research consultation panels**.
- Further the development and use of **effective systems to capture and share data, good practice, evidence and outcomes** among staff.
- Increase **awareness** among staff that **including a research approach can add value and additional opportunities to projects and other types of work**.
- Work with the training department, contribute research expertise to the development of our new health and social care academy and its curriculum. The aim of the academy is to upskill the care workforce so care staff can deliver evidence-informed practice across a range of health and social care settings. This includes having the ability to embrace and adopt emerging technologies and best practice innovations.



4 Measuring success

The following key indicators will enable us to monitor how successfully we are delivering our objectives:

- Number of research projects undertaken and outputs developed (such as papers, reports, summary briefings, theories of change, presentations).
- Evidence of use, usefulness and impact of our in-house and partnership research work.
- Increased engagement of residents and customers around research.
- Increased awareness and use of the research governance managed by our R&I team.
- Increase among staff in:
 - knowledge sharing
 - outcomes impact measurement and reporting
 - evidence-informed practice.
- Number of documents and resources in our Research and Intelligence Evidence Bank and staff use of it.
- Number of research-focused social media posts and amount of activity generated.
- Feedback and satisfaction with in-house research services.
- Number of new partners and collaborative research activities undertaken.
- Number of funding bids submitted and amount of external funding achieved.

5 Looking forward

Through the implementation of this strategy we are looking forward to a strong ongoing commitment to evidence and research, as the Trust works in collaboration with, and for, our stakeholders. We are also looking forward to continuing our joint working with external partners on exciting current and future research ventures in areas of importance for care and health, well-being, communities, ageing, technology and housing.

Further information and news about our activities can be found at www.stmonicastrust.org.uk and at https://twitter.com/St_Monica_Trust

If you'd like to contact the Research and Intelligence team please email research@stmonicastrust.org.uk.



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