



Our Year in Review  
**2006-07**





"I am grateful to have had the worries of everyday living lifted from my shoulders and to enjoy the security and comfort of a 'home within a home'."

## THE ROYAL MASONIC BENEVOLENT INSTITUTION – HERE TO HELP YOU

Residential care  
Nursing care  
Dementia care  
Respite care  
Sheltered accommodation  
Care advice  
Holidays  
Home improvement loans

## CONTENTS

Caring for you	01
A Message from the Chief Executive	02
RMBI goes green	04
Caring for carers	05
The RMBI: A resident's view	06
On the right track	07
Fast Track Scheme	07
A Message from our Treasurer	08
Financial information	09
RMBI locations	10
How you can help	12
Our Governing Body	13

## STATEMENT OF PURPOSE

As an organisation offering degrees of care, support and assistance appropriate to individual needs, we are committed to ensuring the individual's right to dignity, respect, choice and control over their own lives.



**“The staff provide an excellent support network for relatives – knowledgeable and caring – they have been unfailingly positive.”**

## CARING FOR YOU

The Royal Masonic Benevolent Institution has been caring for older Freemasons and their dependants for over 160 years. We operate 17 residential care Homes across England and Wales offering a range of high quality care options.

We treat everyone as an individual. Every potential resident is assessed to find out what type of care package would best meet their needs. A tailor-made care plan is then put together, which is reviewed regularly.

Residents who choose an RMBI Home have the security of knowing that they have a home for life regardless of any change in their financial circumstances as long as we can cater for their care needs.

All our Homes are registered with the Commission for Social Care Inspection (CSCI) in England or the Care and Social Service Inspectorate Wales (CSSIW).

In addition to residential care, the RMBI has a team of Care Advice Visitors offering advice and advocacy services for people still living in their own homes. The RMBI also has a loan scheme for home repairs and improvements and organises holidays for those receiving Masonic Financial Assistance.





"I was a little nervous at first, being alone, but I made some new friends on the holiday and I'm sure we'll keep in touch."

### A MESSAGE FROM OUR CHIEF EXECUTIVE

This has been another very successful and exciting year for the RMBI and I am very proud of our business approach both to care and charitable support. In every area of service that the RMBI operates there has been an increase in demand, and performance has risen to meet it.

I am pleased to say that our occupancy levels have continued to rise this year, which has meant that we are providing care accommodation for many more people who need our help. Our occupancy exceeds the national average but my staff teams are not complacent, and are always looking for ways to find people who really do need our care.

Overall, the voluntary sector is managing to achieve much higher standards than Local Authority and privately run Homes. This was reflected in our own Homes by the Commission for Social Care Inspection (CSCI), which marked our Homes 'Very Positive Overall', and shows that we are in a good position for the introduction of the new Rating System, which is to be implemented in the forthcoming year.

In order to maintain our high standards of care and practice we have continued to exceed the regulatory standard for care staff trained to NVQ level 2. The requirement is 50% and all our Homes have reached that mark with over half exceeding 60%.

During the year we have also launched a pilot Fast Track Scheme to encourage the management skills of our Deputy Home Managers and other equivalent grades to 'grow our own' for any future Home Manager vacancies.

The Home Managers and care staff continue to be supported at each Home by the very active Associations of Friends. Our residents benefit from, and we are very grateful for, their contribution of time and effort.

Their activities have raised thousands of pounds to enhance the quality of life of our residents, and they do give so much personally to support many individual people.





**“It is reassuring to know that my mother has a safe, loving haven for the rest of her life.”**

As part of the strategy in our Ten Year Plan, four of our Homes are to be replaced to ensure that we are providing the best care environment which can be run economically. In February work started on site for the first replacement, which is Scarborough Court in Cramlington, just north of Newcastle. I am delighted to say that the RMBI is leading the way in sustainable care home development by the design in this new Home incorporating the latest green technology. Designs for replacements at Albert Edward Prince of Wales Court in Porthcawl, James Terry Court in South Croydon and Stisted Hall in Braintree, are all at an advanced stage and will also incorporate as much of the latest green technology as is possible.

Whilst these capital works are being funded by the re-investment of the cash from the sale of surplus assets we do still have to attract revenue funds each year in order to support elderly people in need in our Homes. I would like therefore to take this opportunity to thank everyone who has supported the RMBI this year in particular, the Brethren of the Provinces of Bristol, Middlesex, Durham, Berkshire, and Leicestershire and Rutland who are currently in Festival for the RMBI. I would also like to wish the Brethren of Northamptonshire and Huntingdonshire every success as they launch their Festival for 2013.

On the subject of Festivals, the Province of Somerset exceeded all expectations by raising £3,564,167 and this will make such a great difference to many older Freemasons and their dependants.

Moving on from Festivals, I would also like to thank members of the Metropolitan Grand Lodge for the continuing success of the London Appeal for the RMBI; thank you all most sincerely for your hard work.

This year has been John Moore's last year as President of the RMBI, and I would like to recognise here his service to the RMBI which, apart from being President, includes Trustee Membership, Chairman and Treasurer and spans over 30 years. I wish him well in his retirement.

We have been very lucky to have attracted a new President with experience both in the charity and care home world and I am looking forward to working with Willie Shackell, who I am sure will be a great asset to the RMBI in the coming years.

**Peter J Gray**  
Chief Executive



**“She has settled into the Home like a duck to water and her quality of life has improved so much - in fact we sometimes have to make an appointment to see her!”**

### **RMBI GOES GREEN**

Scarbrough Court opened in Cramlington, just north of Newcastle, 40 years ago and was in need of modernisation. The RMBI decided it was more cost effective to invest in a brand new state of the art Home. Construction began at the beginning of 2007 in the grounds of the existing Home with residents watching the new building take shape with great interest from a ‘viewing room’ overlooking the site. Once the new Home is completed next summer and residents settled in, the existing building will be demolished.

The new Home will accommodate 55 residents and will feature the latest green technology - using ground source heat to provide heating and hot water in what is a revolutionary green initiative.

The heating and hot water demands of a care home are considerable and the RMBI is leading the way in sustainability by tapping into the natural resources underground. All the heating needs of the Home can be met using around one tenth of the gas that would otherwise be needed. A system of underground pipework will store heat gathered from solar panels during the summer, and feed it into the building as it is required in the winter. The system will help keep running costs down and conserve vital energy resources. As an additional conservation measure, a grey water recycling system will use waste water for flushing toilets.

The RMBI is also proving to be a considerate neighbour, working with the contractor and the local authority to create a temporary slip road off the adjacent dual carriageway to avoid site traffic having to route through the neighbouring residential area.

Scarbrough Court is the first of four RMBI Homes to be replaced over the next few years. Other Homes will incorporate sustainability into their design where local conditions allow.





**“We are feeling much better now and haven’t the worry of house-keeping, shopping, cooking etc.”**

### **CARING FOR CARERS**

The RMBI’s Care Advice Visiting Team offers advice and advocacy services to Freemasons and their dependants living in the community. A good deal of their work has been with clients and their carers; people looking after husband, wife, mother, father, often 24 hours a day, 7 days a week. Some carers live separately with their own home and family to look after.

Carers’ lives often seem to revolve around the person they are caring for, with little or no time for themselves.

They may also have health problems themselves and can sometimes develop others due to their caring role. They can struggle with feelings of guilt that they are finding it hard to keep patient and cheerful when the person they love may be changed in personality.

Although most clients are older, they also see families where the main bread-winner is much younger but unable to work because of poor health or disability. This sometimes results in the spouse or partner caring for the client and also for children of the family at a time in life when financial need is very great. In these cases, the Team might also liaise with the Masonic Trust for Girls and Boys.

The Team discusses support groups like the Alzheimer’s Society or the Stroke Association and the practical advice and help they offer. Carers also have rights themselves, both to respite care and to financial benefits. In addition, there is help from groups like Crossroads and those specifically for carers to share up to date news and advice and to offer support from people who really have experience of their own situation. It may be appropriate to look for help from voluntary agencies such as SSAFA, Royal British Legion or other occupational charities. The Team often liaises with the New Masonic Samaritan Fund, now working in partnership with the RMBI on respite care.

The Team can also advise on accessing financial help from Masonic charities, both for funding mobility aids and grants towards everyday living costs. The RMBI’s Victor Donaldson Fund can provide finance for home adaptations which would not be covered by Social Services.

The Team’s aim is to offer carers positive advice, a bit of lateral thinking perhaps, and, at the very least the opportunity to talk to someone who understands.

Do you know someone who needs the Team’s help?



**“From her arrival, the staff surrounded her with loving care, support and understanding.”**

### THE RMBI: A RESIDENT'S VIEW

I wanted a cup of tea, but could not raise the energy to get it.

That's when realisation dawned that I needed care. Having had nine years as a widower, and having to do everything myself, I was now at the mercy of a relentless resurgence of my childhood polio, which, I was told, was progressive. However, the thought of going into care was quite alarming. Some hard rational thinking and planning was needed, but I had no capital to pay for a daily help, and I was having serious problems with leg fatigue and the consequential stumbling and occasional falling.

Where on earth could I get the help I needed? And hopefully retain some degree of self respect? It took long enough for the penny to drop, but eventually I telephoned my Lodge Almoner who obtained brochures and literature on the RMBI.

I went to visit Devonshire Court and was shown a typical room and the various facilities available to residents. These included two electronic organs and a grand piano (music to my eyes), use of an outdoor bowling green and putting green, and spacious grounds. The notice board had a miscellany of coming events – regular events within the Home, shopping trips into town, outings to the theatre, excursions into the countryside with a few breaks for refreshments, either at tea rooms, a pub, or a garden

centre. Transport was by the Home's own minibus. I was afraid there might be a Holiday Camp style routine, but there was no compulsion to join in.

The ordeal of putting my house on the market, deciding what I might be allowed to take, packing, and actual moving is best glossed over. But on admission everything was done for me. Gradually the room took shape as my home with my large television and desk with my computer, printer and fax/phone soon installed.

I now have everything I need to personalise my new home. The staff are superb and nothing is too much trouble.

Devonshire Court has been my Home since December 2006, and during my first few months here I was asked many times how I liked it. My answer was (and still is) the same – “I love it here, to the extent that if you want to get rid of me it will take a court order!”

**Charles Best**  
Devonshire Court,  
Oadby, Leicester





**“If nothing else the Fast Track Scheme has given me a lot more confidence in myself and what I can do.”**

### ON THE RIGHT TRACK

A new overhead tracking system installed early in 2007 in the nursing wing has made a great deal of difference to the residents and staff of Queen Elizabeth Court. The residents appear more comfortable and say they feel safer and less restricted when being moved. The new equipment has also made areas of the residents’ bedrooms more accessible to them.

The tracking has also reduced the time it takes staff to assist residents as the equipment is readily available in their rooms and there is no need to go in search of a mobile hoist. The new system has improved manoeuvrability and as there is less effort involved will minimise the risk of back strain among staff.

This tracking was installed thanks to funding from the Province of Shropshire. It is planned to install similar tracking systems in other RMBI Homes.

### FAST TRACK SCHEME

The RMBI has developed a scheme to identify and train an internal pool of candidates to help fill future Home Manager vacancies. This will enable us to fill vacancies faster and more cost-effectively as well as improving staff retention due to visible and achievable career progression opportunities within the RMBI.

Candidates have to apply and if accepted carry out a series of projects in their own time. The scheme requires a great deal of hard work and commitment from trainees, but those who are undergoing the training now feel that it is well worth it.





**"I and my daughter visited many nursing homes but the RMBI Home stood out as more like a hotel than a residential nursing home."**

### **A MESSAGE FROM OUR TREASURER**

2006/07 was another financially successful year for the Charity. Festival and other donations income received were at record levels and for the first time ever, our Homes had a small surplus after the receipt of the charitable contribution towards residents' fees.

An operational surplus of £3 million was achieved, which together with the £2 million realised on the disposal of surplus property and other assets, brought the total surplus for the year to £5.1 million, slightly down on last year.

Our residential care homes continued to improve their financial performance, by increasing occupancy levels and controlling costs. Occupancy levels in the Homes are the key drivers to a Home's care provision and financial success and the recent increased emphasis on marketing the Homes will, I am sure, bring further benefits in the years to come.

In view of the Charity's relatively strong cash position, the special contribution towards reducing the pension scheme deficit was increased from the planned £0.5 million to £1 million, reducing the deficit to £1 million. With bond yields increasing in recent months, the deficit is expected to disappear by the end of the current financial year, when the triennial valuation is due.

Our investment and interest income continued to grow as dividend levels improved and interest rates increased on our higher cash balances. UBS Global Asset Management, our Fund Managers, did not have quite the same success in increasing our portfolio value as in the previous year, but still managed to increase its value by almost £1.9 million to just under £59 million.

The programme of re-investment in our Homes is now well underway, with the construction of the new Scarbrough Court in Cramlington having started in February and three other Homes at an advanced planning stage. We have been particularly successful over the last year in selling a number of surplus property assets for reinvestment into these capital plans.

Overall, the charity further improved its financial position during the year and with net cash balances of over £11.8 million, it is in a strong position to complete its planned capital programme and to provide increased support to all our residents and other older Freemasons and their dependants.

**James H Newman**  
Treasurer



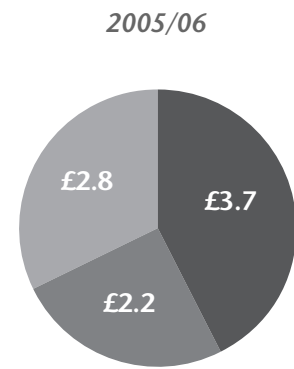
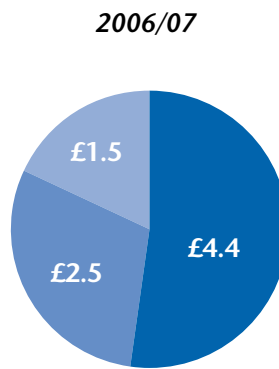
“My father is much fitter now than he was when he arrived with you.”

### CHARITABLE INCOME

2006/07 £8.4 MILLION

2005/06 £8.7 MILLION

- Masonic Donations
- Investments & Rents
- Legacies

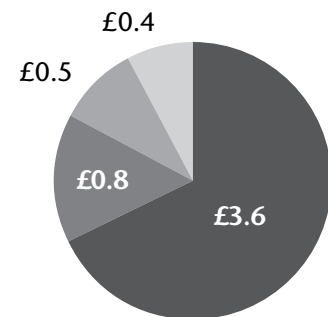
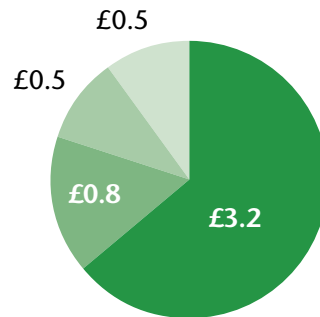


### EXPENDITURE

2006/07 £5.0 MILLION

2005/06\* £5.3 MILLION

- Charitable Support
- Central Care
- Governance
- Fundraising



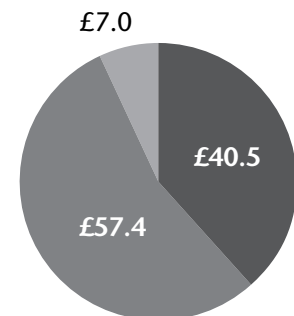
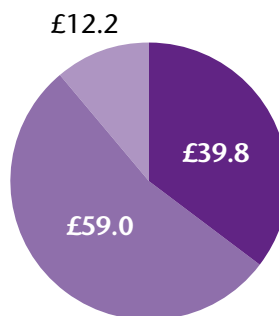
\* restated

### CASH & OTHER ASSETS

2006/07 £111.0 MILLION

2005/06 £104.9 MILLION

- Care Homes & Property
- Investments
- Net Current Assets \*\*

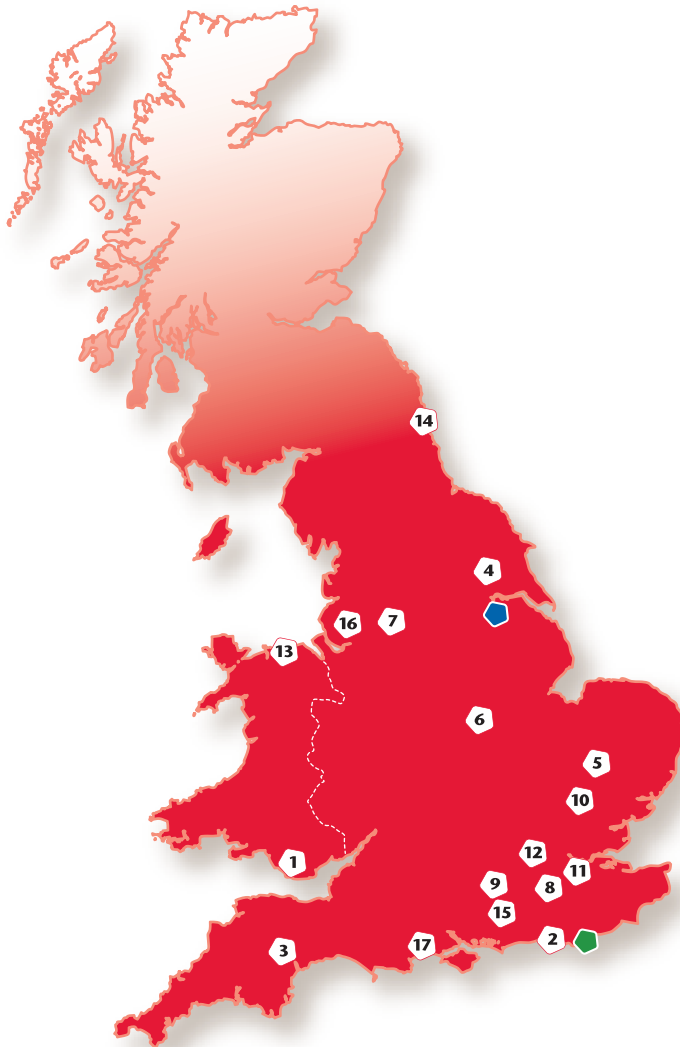


\*\* not including pension fund liability of £1m



"The memory that will live with us is the genuine love and affection shown to her by all the staff."

## OUR LOCATIONS



### ALBERT EDWARD PRINCE OF WALES COURT 1

Penylan Avenue Porthcawl Mid Glamorgan CF36 3LY  
Tel 01656 785311

### BARFORD COURT 2

157 Kingsway Hove East Sussex BN3 4GR  
Tel 01273 777736

### CADOGAN COURT 3

Barley Lane Exeter Devon EX4 1TA  
Tel 01392 251436

### CONNAUGHT COURT 4

St Oswalds Road Fulford York YO10 4FA  
Tel 01904 626238

### CORNWALLIS COURT 5

Hospital Road Bury St. Edmunds Suffolk IP33 3NH  
Tel 01284 768028

### DEVONSHIRE COURT 6

Howdon Road Oadby Leicester LE2 5WQ  
Tel 0116 2714171

### ECCLESHOLME 7

Vicars Street Eccles Manchester M30 0DG  
Tel 0161 788 9517

### JAMES TERRY COURT 8

51 Warham Road South Croydon Surrey CR2 6LH  
Tel 020 8688 1745



“You have not just taken mum in and looked after her for me, but showed me and all my family nothing but kindness and love.”

- 9 LORD HARRIS COURT**  
Mole Road Sindlesham Wokingham  
Berkshire RG41 5EA  
Tel 0118 9787496
  
- 10 PRINCE EDWARD, DUKE OF KENT COURT**  
Stisted Hall Kings Lane Stisted Braintree  
Essex CM77 8AG  
Tel 01376 345534
  
- 11 PRINCE GEORGE DUKE OF KENT COURT**  
Shepherd's Green Chislehurst Kent BR7 6PA  
Tel 020 8467 0081
  
- 12 PRINCE MICHAEL OF KENT COURT**  
Stratford Road Watford Hertfordshire WD17 4DH  
Tel 01923 234780
  
- 13 QUEEN ELIZABETH COURT**  
Clarence Drive Craig-y-Don Llandudno  
Conwy LL30 1TR  
Tel 01492 877276
  
- 14 SCARBROUGH COURT**  
Alexandra Way Cramlington  
Northumberland NE23 6ED  
Tel 01670 712215
  
- 15 SHANNON COURT**  
Portsmouth Road Hindhead Surrey GU26 6DA  
Tel 01428 604833

**16 THE TITHEBARN**  
Moor Lane Great Crosby Liverpool L23 2SH  
Tel 0151 924 3683

**17 ZETLAND COURT**  
128 Alumhurst Road Westbourne  
Bournemouth BH4 8HU  
Tel 01202 769169

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**HAREWOOD COURT**  
Wilbury Road Hove East Sussex BN3 3GL  
Tel 01273 739515

Recently refurbished to a high standard, Harewood Court has sheltered apartments for sale. To find out more, please contact our selling agents: Parsons Son & Basley on 01273 778668

**HARRY PRIESTLEY HOUSE**  
30 Fieldside Thorne Doncaster DN8 4BD  
Tel 01405 814 777

Managed on behalf of Masonic Care Limited by the RMBI, this Home accommodates a small group of adults with learning difficulties.



“Working within the medical profession, it is wonderful to see a nursing team so caring and professional at all times.”

## HOW YOU CAN HELP

### MAKING A DIFFERENCE IS EASY

The RMBI is heavily reliant on donations to provide its care services. There are many ways to make a donation.

### COMMITTED GIVING

A regular gift is such an easy way to support the RMBI. The convenience of setting up a monthly, quarterly or annual Standing Order takes all the strain out of giving.

### LEGACIES

After you have taken care of your loved ones you may wish to consider leaving a legacy to the RMBI. We are grateful for any size of bequest to help fund our services.

### GIFT AID

If you are making a personal donation please make sure that you have signed a Gift Aid form. This will ensure that for every pound you donate, the RMBI can get an extra 28 pence.

### GIFTS OF PROPERTY, LAND AND SHARES

If you are considering making any of these gifts, you can contact us to discuss in the strictest confidence.

### BECOMING A PATRON

Becoming a Patron of the RMBI is a special way of showing your support. You or your Lodge can make a one off donation to achieve your Patronage level or build it up over time.

### SPONSORED EVENTS

If you are running an event which attracts sponsorship, you can now offer supporters the opportunity of donating online. Look at the Justgiving website for more information [www.justgiving.org.uk](http://www.justgiving.org.uk)

### BECOME AN RMBI SPEAKER

Help spread the word about the RMBI by speaking at meetings to ensure that Brethren are aware of the services we provide. Speakers' notes and leaflets are available to help you and training is provided.

**FOR MORE INFORMATION ON ANY OF THE ABOVE  
VISIT OUR WEBSITE [www.rmbi.org.uk](http://www.rmbi.org.uk)  
OR CALL 0207 596 2400**



“I know she very much valued the respect she was always shown and maintaining her privacy and independence was very important to her.”

## OUR GOVERNING BODY

**GRAND PRESIDENT**  
HRH The Duke of Kent, KG

**DEPUTY GRAND PRESIDENTS**  
Lord Northampton, DL  
Peter Lowndes  
David Williamson

**GRAND VICE-PRESIDENT**  
Brian Smith

**PRESIDENT**  
John Moore

**DEPUTY PRESIDENT**  
Dennis Vine

**TREASURER**  
James Newman

### BOARD OF TRUSTEES

Chris Caine (Chairman)  
William Aukland  
Michael Davey  
Russell Race, DL  
Dr John Reuther (*from 18 October 2006*)  
Michael Ward (*from 18 October 2006*)

### CO-OPTED MEMBERS

Derek Buswell  
Robert Upton

### THE MANAGEMENT TEAM

Chief Executive  
**Peter Gray**  
Executive Director of Care Operations  
**Kevin Harris**  
Executive Director of Finance  
**Christopher Head**  
Director of Human Resources  
**Sharon Jager**  
Director of Properties  
**Andrew White**  
Director of Fundraising and Marketing  
**Anne Molyneux** (*until 8 February 2007*)

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