

2025
2030

Taunton Heritage Trust

Strategic Working Plan

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Introduction

The Taunton Heritage Trust is a registered almshouse charity with roots dating back to the early 1600s. Originally founded to support those in need within the old Taunton Deane area (area of benefit), the Trust has a long-standing tradition of providing safe, affordable housing for older people. In July 2018, the Trust became a Charitable Incorporated Organisation (CIO No. 1177162), continuing the legacy of its previous charity with a modern governance structure.

Today, the Trust owns and manages 67 self-contained almshouse flats across five sites in Taunton, including a Grade I listed building from 1635. These homes provide sheltered, independent living for people aged 60 and over in a supportive community. A Resident Lead, 24/7 emergency alarm system, and a programme of activities and events help foster a strong sense of wellbeing and belonging.

Unlike traditional tenancies, residents are beneficiaries of the charity and pay a weekly maintenance contribution, often supported by housing benefit. The Trust is a registered housing provider and an active member of the National Almshouse Association.

In addition to housing, the Trust runs a grant programme offering financial assistance to individuals of all ages in need across the area of benefit. It also supports local education through grants to schools within the area of benefit.

Guided by a dedicated board of Trustees and a part-time staff team, the Trust remains committed to its founding principles–honouring the legacy of its early benefactors while addressing modern social needs. Its 2025-2030 Strategic Plan sets out a clear vision to sustain and enhance its impact for years to come.

Objects

To provide affordable, suitable and safe housing in the form of almshouses accommodation for people in need aged 60 years and over with priority being given to inhabitants of the borough of Taunton Deane (area of benefit).

To provide relief in need for the residents of the almshouses and other inhabitants of the area of benefit, (or in exceptional cases to persons resident immediately outside the area of benefit), by making grants of money for goods, services or facilities for the benefit of individuals or other charities or in such other ways as the CIO may see fit.

To provide annual grants to Bishop's Fox School and as part of the British School Fund, to other schools in order to further the education of children and young people in the area of benefit.



Vision

To create a lasting legacy of compassion and care by providing high-quality, self-contained almshouses and grants to those in need

Mission

- To empower people to live independently and with dignity through thoughtful support and secure housing.
- To offer timely, meaningful financial assistance to individuals facing hardship in Taunton Deane, helping them through life’s toughest moments.
- To invest in the education of young people by donating small grants to local schools.

Culture & Values



Community



Heritage



Identity



Respect



Equality



Professionalism

- Foster a strong sense of community built on care, friendship, inclusivity, and mutual respect
- Honour and preserve the Trust’s history and heritage, acting as custodians of its historic buildings
- Promote and safeguard the Trust’s identity and reputation as a respected Almshouse charity
- Uphold a culture of respect, kindness, equality, dignity, and professionalism in all that we do

Aims

People

- To invest in and empower staff and trustees to work safely, professionally, and enterprisingly.
- To foster a culture of growth and collaboration, and be a trusted partner to residents, grant recipients, service providers, and contractors.
- To examine how services can better meet the evolving needs of those most in need.

Property/Buildings

- To strengthen our capacity to serve more individuals in need by expanding our reach with more high-quality accommodation.
- To maintain and further adapt our buildings to improve efficiency, sustainability, and environmental impact, whilst protecting their historical characteristics.
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Finance

- To manage the Trust's finances ensuring long-term sustainability, transparency, and value for money.
- To protect and grow our assets to support the charitable mission and invest in the future of residents, buildings and services.

Governance & Compliance

- To provide clear leadership, accountability, and oversight to support our charitable objectives.
- To uphold the highest standards of governance, meet all regulatory requirements and adopt best practice in transparency, risk management, and ethical decision-making.

Technology

- To adopt new technologies where it can assist the Trust and beneficiaries, investing in digital infrastructure and skills training for staff and residents.



People

- Encourage and support residents to lead and participate in events and courses that enrich lives, build confidence, and strengthen social bonds.
- Re-define and expand the understanding of "people in need" in the context of modern society, ensuring that support reaches individuals experiencing social, economic, or health-related vulnerability.
- Develop a rolling programme of training and professional development for staff and trustees, with an emphasis on leadership, safeguarding, and inclusive practice.
- Introduce a mentoring or buddy scheme for trustees and new staff to support onboarding and shared learning.
- Formally recruit volunteers.
- Embed a values-based framework into day-to-day practice to promote respect, professionalism, and innovation.
- Schedule bi-annual joint trustee-staff workshops to align goals and build stronger working relationships.
- Develop and implement a stakeholder engagement plan to strengthen relationships with grant recipients, contractors, and service providers.
- Share and celebrate the Trust’s vision and heritage to enhance public awareness and engagement.

Property

- Create a clear plan for expanding the Trust’s housing, while considering who qualifies as 'in need' and whether the current age restrictions remain appropriate.
- Implement a planned maintenance and improvement programme across all properties, prioritising energy efficiency, accessibility, and environmental sustainability.
- Continue to explore the use of renewable energy sources (e.g. solar panels) where feasible.
- Integrate sustainability criteria into all repair, maintenance, and procurement decisions.
- Engage residents in promoting responsible use of energy and resources.





Finance

- Implement robust budgeting, forecasting, and financial monitoring processes to ensure responsible management and long-term sustainability.
- Maintain transparent financial reporting and regular audits to uphold accountability and trust with stakeholders.
- Develop an asset management strategy to protect and optimise the value of property and investments supporting the charity’s mission.
- Allocate funds strategically to maintain and improve services, ensuring value for money and positive impact for residents.
- Ensure the timeliness of financial reporting to trustees

Governance & Compliance

- Ensure board and governance frameworks deliver strong leadership, clear accountability, and effective oversight aligned with the Trust’s charitable mission.
- Maintain exemplary standards of governance by fully complying with all legal and regulatory requirements.
- Embed best practices in transparency, risk management, and ethical decision-making throughout the organisation.
- Foster a culture of continuous improvement in governance to enhance trust and organisational resilience.
- Review risk register format and frequency of updates.
- Embed Trustee induction and ongoing training programme.





Technology

- Improve access to services, strengthen operations and ensure residents are not left behind in an ever-increasing digital society.

Monitoring and Review

- Performance indicators are developed directly from the defined actions in this strategic plan, ensuring they are specific, measurable, achievable, relevant, and time-bound (SMART).

- These indicators are created to reflect meaningful progress toward strategic objectives. Monitoring will occur at regular intervals through established board reporting mechanisms, allowing for qualitative and quantitative assessment, accountability, and continuous improvement.