

**BELONG**

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# 2026-2029 Strategy



**A values-based,  
not-for-profit  
organisation**

[www.belong.org.uk](http://www.belong.org.uk)





# Introduction from our Chair

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As we approach the 20<sup>th</sup> anniversary since the opening of the first Belong village in Macclesfield in 2007, the milestone provides an apt moment to take stock and put forward an even more ambitious programme for the period ahead, building on the immense achievements of our founding years to enable us to continue to drive excellence, growth and innovation.

We build on solid foundations. Over the past three years, we have maintained an excellent track record on quality, on people measures and on financial sustainability. 27% of Belong services inspected by the Care Quality Commission are rated ‘Outstanding’, and 60% rated ‘Good’; we have won Laingbuisson awards for Innovation in Care and Excellence in Retirement Living; Belong occupancy has averaged 96% over the past three years, while still in the fill-up period for our newest village; and we retained our Investor in People (IiP) Gold status.

The feedback from IiP inspectors was particularly pleasing; our not-for-profit, values-based ethos shone through. They praised the unwavering commitment to our customers, evident teamwork and a sense of ‘family’, a culture of continuous improvement, fantastic training and career development opportunities and a genuine commitment to listening to and empowering our people.

These are all important themes that give us huge confidence for the future, as we look forward to creating vibrant communities in new locations, reaching ever more people in the wider community and creating more exciting opportunities for those working with us.

A handwritten signature in blue ink that reads "T Bristlin". The signature is fluid and cursive, with the first letter 'T' being particularly large and stylized.

**Tony Bristlin** FCA, FCMA, MBA  
*Chair of the Belong Board*



# A message from our CEO

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I am delighted to introduce Belong's new three-year strategy, a plan that builds on the significant progress we have made and sets a confident and ambitious course for our future. It's a strategy built around providing the absolute best support, guidance and opportunities for Belong colleagues in order to deliver exceptional outcomes for people living with dementia and indeed

all those we support. It's also about doubling down on the sense of place and community-shaping, in and around our villages, aspiring to go even further to provide opportunities for people to live happy, fulfilling lives, full of purpose and vibrancy.

Over recent years, we have expanded our services and continued to innovate in ways that place people, relationships, and community at the heart of everything we do. From the opening of our first intergenerational village in Chester, through the launch of initiatives such as the We Belong employee forums and Customer and Relative Committees, to retaining our Investors in People Gold status and winning multiple awards along the way, our organisation has demonstrated what is possible when we work together with purpose and belief.

This strategy sets out our ambitions for the next chapter. It reaffirms our commitment to delivering the highest quality services, being an exceptional place to work, and deepening the social value we bring to the communities around us. It also recognises the need to amplify the voices of those who live and work within our villages, ensuring that lived experience guides our decisions and shapes the evolution of the organisation. Alongside this, we outline our aspiration for thoughtful, sustainable growth that expands our reach without compromising the essence of what makes Belong unique - our world-leading village model and our philosophy of care and support.

As we look ahead, I'm particularly excited about the launch of our new Belong Community Value Fund, a significant commitment that will allow us to create even stronger ties with people and groups in communities

around our villages, who are making a meaningful impact and enriching the lives of the people we support. I'm also personally passionate about our goal of offering the absolute best learning and development support in our sector; hence our commitment to enabling colleagues to flourish in their roles and, where desired, prepare for future career progression.

As a not-for-profit provider, we are committed to putting the quality of our service above all else. With the passion, talent, and resilience of our teams, and the trust placed in us by our customers and partners, I am confident that we will continue to lead the way in redefining what exceptional care and community living can be. We've created something truly special in Belong, something admired across the world, and we are excited about the opportunity to impact more lives, in increasingly innovative ways, as we look to the future.

We are grateful for the commitment of all our colleagues, partners and community members and recognise the unique role everyone plays in helping bring our vision to life – thank you.

A handwritten signature in blue ink, appearing to read 'Martin Rix', with a stylized flourish at the end.

**Martin Rix** MEng (Hons), MSc, MRICS  
Chief Executive Officer



# Achievements from the past 3 years

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## Relaunch of the Belong Brand & the Belong Champion Awards

As part of the outgoing three-year strategy, we carried out a customer and colleague listening exercise to ensure our positioning reflected the brand strengths and proposition. A new website and brand visuals followed, and we celebrated with a relaunch of our annual employee recognition awards, moving to a new, evening format.

## 2023

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## Laingbuisson Award

Belong won the Laingbuisson Award for Innovation in Care in recognition of the positive impact of the intergenerational living model pioneered in Belong Chester, the first village to integrate a children's day nursery, operated by partners, Ready Generations.

## Global Household Consortium

Belong joined forces with Australia's HammondCare, and The Green House Project in the US to form the Global Household Consortium, advocating for the wider adoption of small domestic household models of residential care.



**Double Award Win**

Belong was named Best Health and Wellness Service at the HealthInvestor Seniors Housing Awards and took home the trophy for Excellence in Retirement Housing at the Laingbuisson Awards a couple of months later, both testament to the outstanding opportunities for those living in Belong.

**Westminster Abbey TV Appearance**

Intergenerational choir members from Belong Chester were invited to perform at Westminster Abbey for ITV's Royal Carols: Together at Christmas concert. The royal invitation resulted from recognition for the choir's caring community spirit.

**Village Customer Committees launched**

As part of its commitment to increasing customer voice in shaping village life, Belong launched new committees for customers and relatives, meeting regularly to debate village matters.

**2024**



# Achievements from the past 3 years

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## Opening of first home care hub in Southport

Launching ahead of the latest Belong village under construction in Birkdale, Belong at Home Southport is the first of our home care services to have a “shopfront” in the heart of the town.

## Workforce investment

Recruitment, retention and investment in our people continues to grow. Staffing agency usage reduced by 35% over the last three years, alongside an increase in Belong employees of 100 in the same period. In our last financial year, staff turnover fell by 7.5%, colleagues each completed on average 29 training courses and 49 people were promoted from within.

## IIP Gold Accreditation

Belong retained its accreditation as a ‘Gold’ level Investor in People using the IiP assessment scheme, signalling its commitment to reward, recognition and investment in its workforce. We continue to make progress in driving our employee value proposition.

## 2025

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### **Volunteer campaign**

New volunteer campaign launched to strengthen community involvement. Volunteer opportunities include providing companionship, facilitating activities, supporting in the bistro, gardening and joining the minibus driver roster to increase opportunities for outings.

### **Retail Charity Bond**

Belong's second retail charity bond issue raised £29million for future developments. This gives ethical investors the opportunity to be part of the Belong village success story, while enabling us to expand our reach to make Belong care services more widely available.

### **Operator of the Year**

Belong was named Operator of the Year at HealthInvestor Seniors Housing Awards, recognising the company's innovative approach to integrated retirement living that challenges traditional models of older people's housing.



# Our Vision

**Belong aspires to redefine what's possible for the wellbeing of older people, integrating services, housing and community to operate a continually improving and innovative care model. Importantly, we want to give our customers and colleagues a genuine voice in how we go about it.**

As a not-for-profit provider, we invest extensively in developing and honing our Belong village model, which brings together a number of vital aspects of care and housing to offer a unique proposition to those looking for support in later life. Some of the key aspects are detailed below.

## Key Features

### Continuum of services

There are two options for those looking to move to a Belong village: either an apartment for those who are looking to live independently or a household for those who need 24-hour care, including nursing and dementia care. There are also options for home care and specialist day care services, available both to apartment tenants and those living in the wider community. This continuum of care means Belong is able to support people as their needs change.



### Household model

At the heart of Belong's approach is the way that care is organised around small households, where 24-hour care, including nursing and dementia support, is provided in extended family-sized settings of up to 12 people. This means that people live in a family-like environment, where they feel they belong and enjoy positive relationships with those around them.



Every household is 'blended' in supporting residents with a range of needs rather than segregating people based on physical conditions, i.e. we do not have separate dementia or nursing wings. Instead, we aim to match people based on their interests and personalities to assess where and with whom they will most feel at home. This approach helps in normalising life for people with dementia and ensuring that we do not need to move people if their needs change. Professionals comment on the positive atmosphere and reduced use of anti-psychotics to promote wellbeing.

As a pioneer of this model in the UK, Belong is a founding member of the International Consortium for the Household Model, along with HammondCare in Australia and The Green House Project in the United States. Together, we collaborate to promote the benefits of this model and make it more widely available across the globe.

### **Vibrant community**

All residents move freely throughout the village and enjoy access to a wider community in the village centre, making use of facilities such as a bistro, venue with licensed bar, hair salon, gym, creative studio and library. All village centres are open to the public and there is a bi-monthly What's On programme with a wide range of activities and entertainment in line with the interests of customers.



### **Dementia expertise**

Belong villages are developed to best practice dementia design principles and all colleagues receive specialist dementia training. This is backed by input from dementia specialist Admiral Nurses, employed by Belong in partnership with the charity, Dementia UK. Belong offers this free dementia specialist support service to all Belong customers with a dementia diagnosis, as well as their family members and carers. Every village also runs a monthly B's Café memory clinic as a drop-in for dementia advice.



### **Specialist exercise and rehabilitation service**

There is a hi-tech gym in every village, offering a specialist exercise service which is included within Belong's care fees. Technology includes screens to show favourite landscapes while residents are exercising and gaming technology to support targeted exercise routines, promoting healthy competition through league tables and high scores - all proven to encourage people to exercise for longer.



Residents have seen incredible results from their personalised rehabilitation programmes, from regaining the ability to walk or even to go home again. Belong's exercise service has been independently assessed by the National Centre for Sport and Exercise Medicine, achieving a level 2 for 'Emerging Practice'. This means that it provides each resident the opportunity to improve their quality of life through physical activity no matter what their physical or mental capacity.

# Our Values



## **STRONGER TOGETHER**

We are here for each other and believe that every member of our community contributes to the best possible experiences and outcomes. We are united in our purpose and working together enables us to achieve more.



## **RESPECT FOR ALL**

Honesty and openness are central to our culture. We understand everyone is an individual and encourage an inclusive environment where every voice is heard, and different perspectives are valued.



## **BE YOUR BEST**

We empower others to reach their full potential. We give each other the confidence to see beyond limits, learn new skills and take control of our futures.



## **BETTER TOMORROW**

We are constantly evolving towards a brighter future. We are not afraid to challenge the norm, explore ideas and create new opportunities. Our focus on innovation enables us to continually improve.



## **CARE FROM THE HEART**

We approach every interaction with empathy, kindness and compassion. We always seek to uplift others and create a nurturing, supportive environment. We foster a caring and vibrant community for our team and the people we support.



# Our Strategic Priorities

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## **Highest Quality Services** ***Empowering People to Live Their Best Lives***

Belong's model of care is about challenging long-established norms and delivering innovative and better ways to support people with dementia and all older people, offering them more choice and agency about how they live their lives. To ensure that this is delivered to a consistently high standard for every person we support, we need to make sure that we have the highest levels of governance and assurance in place. We will also focus on enhancing some key aspects of our model that underpin happiness, including our catering offer and how we facilitate meaningful engagement and experiences for the people we support.



## **Best People for Best Services** ***Elevating our Team***

Working in care is extremely rewarding but can also be challenging. We want to be the first choice employer in the care sector in every area in which we operate. To help achieve this, we will support our teams by providing the very best training, coaching and development programmes – allowing people to feel confident and capable in their roles and providing them with a platform to excel in supporting people with dementia. We also believe that happy teams provide the best care and we will focus on supporting the optimum colleague experience via ongoing support for their wellbeing and recognition.



## **Social Value and Sustainability** ***Making our Mark***

Belong has always played an important role in our communities, and over the next three years, we want to extend our reach and deepen our impact. We will strengthen our position as an ethical, purpose-driven organisation that creates value, not only for the people who live with us, but also for the wider communities in which we operate. We will do this by supporting community value causes that are also of interest and benefit to those who live in our villages and in line with our charitable objectives.





## **Giving People a Voice** ***Listening, Co-production and Advocacy***

We believe that people live their best lives when they feel heard, respected, and are able to influence the world around them. Over the next three years, we will build on our work to date and further amplify the voices of those who live and work within Belong, ensuring that lived experience is at the heart of our decision-making.



## **Growth** ***Expanding our Reach***

Our aspiration for growth is rooted in our belief that more people should be able to experience the life-enhancing benefits of the Belong model. Over the next ten years, we will pursue balanced, sustainable, mission-driven growth that strengthens our long-term financial resilience and allows us to continue to innovate our model and approach.



## **Digital** ***Enhancing Lives with Technology***

Belong's digital ambition is to create a simpler, more intelligent and more connected technology environment that strengthens relationships, supports excellent care, and enhances the resident experience of daily life in our villages. Over the next three years, we will focus on enhancing existing digital foundations, integrating systems to create a single source of truth, and developing the intelligent use of data and emerging technologies, such as artificial intelligence, to offer earlier insight, reduce administrative burden and support better decision-making.



# Highest Quality Services

## Empowering People to Live Their Best Lives

**We will develop governance and assurance processes that lead to outstanding services everywhere**, ones that create clarity and accountability, provide early indicators of risk, effective oversight and a culture where learning and improvement are constant. It will become a system that protects quality and builds on performance and trust at all levels.

**We will drive excellence in catering** by ensuring that customers consistently enjoy high-quality mealtime experiences in our unique household environment, continuing to drive our focus on excellent, nutritious and well-presented food and drink. Food and mealtime experience have always been central to quality of life in our villages, but we want to further elevate their importance.

**We will enhance the experience of our residents, tenants, and customers by providing them with a variety of opportunities for meaningful engagement and experiences.** We have always believed that providing varied opportunities to stay active, involved and stimulated is crucial in adding meaning to the lives of people with dementia and indeed everyone who lives with us. We will refocus on how we facilitate this, building on the work of recent years to make exercise, creativity and the arts central pillars of our approach.

		Current	28/29
Measure	CQC Ratings (Good and above) %	<b>86.7%</b>	<b>100%</b>
	Customer Survey Recommendation Rate	<b>96.7%</b>	<b>97.5%</b>
	Carehome.co.uk rating (out of 10)	<b>9.8</b>	<b>9.9</b>
	Homecare.co.uk rating (out of 10)	<b>9.7</b>	<b>9.9</b>

# Best People for Best Services

## *Elevating our Team*

- We will develop a sector-leading learning and development culture,** with a team that provides the support, structure and resources to allow our colleagues to flourish. Where team members wish to develop their careers, we will provide clear pathways and support for progression, enabling colleagues to take advantage of opportunities as they emerge.
- We will cultivate inspirational leaders across our organisation,** individuals with the ability to inspire and motivate others and lead by example, whilst living our values. We want our leaders to be visible and demonstrate competence, confidence and compassion in their leadership.
- We will focus on enhancing the experience of colleagues** by focusing on their wellbeing, support structures and ongoing reward and recognition for the contribution they make. We will also ensure that we always support and respect people for who they are, supporting and celebrating diversity.

### How we will know when we get there

		Current	28/29
Measure	Overall Voice Survey Recommendation Rate*	<b>3.9</b>	<b>4.4</b>
	Learning & Development Voice Survey Score*	<b>3.9</b>	<b>4.4</b>
	Number of Internal Promotions	<b>54</b>	<b>61</b>

\* All above measures are specific questions or themed groups of questions from our annual Employee Voice Survey. All scores in the surveys are out of a possible total of 5.

# Social Value and Sustainability

## *Making our Mark*

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**We will launch a new Belong Community Value Fund (BCEF) for each village**, allocating £20k per annum in each village to support purposeful community projects that also have a benefit to Belong customers. Villages will co-design and implement projects that align with Belong's values and strategic goals, and decisions will be made by local panels made up of the General Manager, customer and family representatives. All activity will be overseen centrally to ensure consistency and excellent outcomes.

**We will continue to provide access to our services to those of limited means**, by continuing to provide financial support for customers to access when funds are limited or run out.

**We will continue to build meaningful partnerships with community organisations whose values align with ours and who can enhance the lives of those people we support** – deepening village networks and driving engagement with our partners.



**We will continue to grow our volunteer base**, enhancing the lives of the people we support by linking with exceptional individuals who wish to give something back to their community. We will support these people well throughout their volunteering journey and celebrate their contributions.

**We will champion environmental sustainability**, reducing our carbon footprint through improvements in energy efficiency, waste reduction, supply chain practices, and estate planning. Our ambition is to ensure that Belong’s villages are thriving, future-focused environments that respect the planet and support healthier living.

**We will continue to ensure that the organisation has a strong, long-term future by further improving our financial credentials and security**, ensuring that we have enough surplus to continue to reinvest in our existing services as we grow.

		Current	28/29
Measure	Total Subsidised Customers (No.)	<b>35</b>	<b>40</b>
	Volunteer Numbers	<b>28</b>	<b>56</b>
	Total Number of Community Groups linked with villages	<b>48</b>	<b>65</b>
	Energy use* (GWh)	<b>11.3</b>	<b>10.2</b>

\* Based on existing villages

# Giving People a Voice

## Listening, Co-production and Advocacy

**We will create a culture where feedback, positive or constructive, is actively sought, valued and acted upon.** This will include strengthening our resident, tenant, customer and colleague forums; ensuring everyone feels confident and capable in raising ideas; and developing more systematic ways to capture and respond to input.

**We will continue to build platforms where the voices of older people, including those living with dementia, are amplified, locally, regionally and nationally.** Belong will continue to contribute visibly to sector conversations, championing models of care that prioritise independence, dignity, relationship-centred support, and true integration with communities. We will use our influence responsibly, advocating for positive change in social care, championing improved experiences for people who draw on support, and contributing evidence, innovation and thought leadership to shape the sector's future.

		Current	28/29
Measure	Employee Survey Voice Score*	<b>3.5</b>	<b>4.1</b>
	Customer Survey Voice Score*	<b>92%</b>	<b>95%</b>

\* All above measures are specific questions or themed groups of questions from our annual Customer and Relative Survey or Employee Voice Survey. Employee survey scores are out of a possible total of 5.



# Growth

- We will pursue the development of at least another three villages over the next ten years**, in addition to our new Birkdale village that will open late 2026.
- We will explore new models that respond to evolving customer expectations and expand choice**, rethinking how our apartments, households, experience days, and home care services can best meet future needs. Any future Belong villages will be built on the core foundations of our small household model, our continuum of care and central facilities open to the public as well as those people we support.
- We will continue to pursue sustainable growth in our Belong at Home services**, including evaluating the success of our first Belong at Home shopfront in Southport. To do so, we will evaluate our service and commercial model to see how it can be further enhanced.

		Current	28/29
Measure	Household Room Numbers	<b>566</b>	<b>638</b>
	Apartment Numbers	<b>191</b>	<b>221</b>
	Belong at Home Hours Delivered	<b>65,000</b>	<b>81,250</b>
	Experience Days Provided	<b>4,900</b>	<b>6,000</b>



# Digital

## Enhancing Lives with technology

### **We will strengthen digital foundations across all current and future villages**

As Belong grows, we will ensure every new and existing village benefits from even stronger digital infrastructure: robust core systems, appropriate hardware and reliable Wi-Fi. This will ensure colleagues are able to deliver exceptional care using tools they trust, and promote a positive resident experience, taking advantage of the latest technologies for daily living and to remain connected to their communities and families.

### **We will create a connected ecosystem through system integration**

We will design and deliver a more unified and interoperable technology architecture that enables the seamless flow of information across care, workforce, operations, finance and estates systems. For new services and villages, digital integration requirements will be embedded from the outset, reducing duplication and strengthening our organisational insight.

### **Use data and AI to support intelligent, predictive decision-making**

We will use the capability to turn operational and care data into meaningful intelligence. As we expand, we will adopt responsible uses of AI to help identify risks earlier, forecast pressures, automate manual tasks, and support an exception based management model, freeing colleagues to focus on the areas where human judgement and relationships matter most.

		Current	28/29
Measure	Percentage of core systems meeting our digital aspirations*	<b>40%</b>	<b>100%</b>
	IT support tickets raised in the year	<b>100%</b>	<b>67%</b>

\* Includes 10 core systems across Care, Medication, Belong at Home, HR & Payroll, Finance, Estates, Recruitment and Marketing.



# Financial Targets

	Belong Limited Projected 31 March 2026	Belong Limited Projected 31 March 2029	CHANGE
Scale	No.	No.	%
Villages	8	<b>9</b>	<b>↑13</b>
Household Rooms	566	<b>638</b>	<b>↑13</b>
Apartments	191	<b>221</b>	<b>↑16</b>

The growth in our facilities provides opportunity to increase the number of people we are able to support. With the opening of Belong Birkdale approaching, we anticipate a steady growth in services provided from that village over the next three years.

With nine villages in operation, following the opening of Belong Birkdale, we are looking to add a tenth village to our portfolio. We expect that this tenth village will be in development during the next three-year period.

Financial Position	£m	£m	%
Fixed Assets (net book value)	110.2	<b>110.6</b>	<b>↔0</b>
Income	55.4	<b>69.3</b>	<b>↑25</b>
EBITDAR	13.9	<b>17.6</b>	<b>↑27</b>
EBITDA*	8.7	<b>10.5</b>	<b>↑21</b>

In 2026, Belong has been assigned a credit rating of BBB+ with outlook stable by Fitch Ratings. As a care charity, Belong's bond financing is one of the first to be publicly rated.

Our villages (fixed assets) are held at historical cost, and this does not reflect the current value of those assets. On that basis we do not expect the value of these assets to change over the three-year period.

With the opening of Belong Birkdale and the continued success of our existing villages, we anticipate that annual income, EBITDAR and EBITDA will increase by between 20% and 30% across the next three years.





\* EBITDA surplus is utilised to fund debt servicing, capital spend in relation to existing villages and new developments, digital projects and future charitable activities.



# Our Commitments

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## To drive success across these areas, Belong will:

-  Set clear, measurable objectives aligned with our vision and values.
-  Provide the resources and capabilities to enable us to deliver on our strategy.
-  Foster a culture of innovation to ensure we remain at the forefront of our sector.
-  Monitor and review progress regularly, to drive ongoing improvements and keep us on course toward achieving our strategic goals.

## What you can do

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Driving our strategy requires a collective effort from all of us and we welcome and encourage everyone to get involved. Everyone in Belong plays a crucial role in our success and every piece of feedback, every suggestion and every contribution matters. Working together, we will continue to change lives for the better, creating vibrant communities where older people are able to lead the lives they choose.

## Visit our website to find out more and get involved:

**[belong.org.uk](https://belong.org.uk)**



**Belong is a not-for-profit organisation with over thirty years' experience in providing outstanding care. As a not-for-profit, any surplus is reinvested into its award-winning services, people and facilities.**

**Belong Limited is a Registered Society under the Co-operative and Communities Benefit Societies Act 2014, registered number 27346R.**

**Belong Limited is registered in England and Wales at Pepper House, Market Street, Nantwich, Cheshire CW5 5DQ.**

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