



Strategic Plan 2023–2026

Registered charity number 1105384





Executive Summary

Age UK Merton has been supporting local older people for nearly seventy years through the delivery of a wide range of services in the home and community.

Our new strategic plan 2023–2026 comes at a crucial point within the history of the charity and enables us to refresh our vision, mission and values as part of our ongoing development.

Our previous three-year strategic plan (running from 2019 to 2022) served the charity well during a period of operational challenges. The current increased demand for services, the financial impact of the ongoing cost of living crisis, changes in health and social care and an increasingly older population have all helped to shape four key development areas or “building blocks” for the future of Age UK Merton. This strategic plan offers some foresight of what success in each of these four areas would mean to our clients, their carers, friends, families, our organisation, and our wider community in Merton.

Building upon our achievements from the previous strategic plan, and placing older people at the core of our thinking, we hope to continue to build upon our reputation as an organisation positively and effectively supporting older people in Merton. All of the team here at Age UK Merton will support the development of annual implementation plans with the actions required to enable the successful delivery of this exciting new three-year strategic plan.



Sarah Goad
Chief Executive Officer



Tobin Byers
Chair of Trustees

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Our vision

Supporting our community with opportunities to love later life

Our mission is to provide quality advice and services that meet the needs of older adults in Merton

Our values are: Quality, Integrity, Kindness, Inclusivity and Collaboration



Our key priorities

Our three key priorities in support of our mission are:

'I feel connected socially and emotionally.'



Priority one
Providing high-quality advice and practical support

'I have access to good advice, information and practical support.'



Priority two
Building social connection

'I feel connected socially and emotionally.'



Priority three
Creating opportunities for lifelong active ageing

'I am active and independent.'



Our services

Living Well

Living Well is a flagship specialised health and wellbeing navigation service which helps people to access services and their community. We deliver holistic person-centred home assessments creating a motivational action plan and supporting older adults to improve their health and wellbeing.

At Home service

Our At Home service provides practical help to enable people to feel comfortable, safe and secure at home with domestic support, shopping and respite for carers. We run this as a cost effective paid for service to clients. Our At Home Support Workers are currently supporting a pilot Home from Hospital support package which gives people aged 50+ in Merton six weeks free support with similar tasks following hospital discharge.

Activity programme

Our activity programme offers people the opportunity to connect, stay active and access home cooked food. Activities include chair-based exercise, Zumba gold, Tai Chi, social club with board games, craft club, quiz sessions, walking group, monthly special lunches, aqua fitness and more! We run a wide range of out and about trips annually. Clients pay for activities/ meals on a low-cost sessional basis.

Information and Advice services

Our accredited Information and Advice services sees our trained advisers offer free information and advice to older people and their families. Our service covers advice on benefits, health and end of life, housing, social care, local services and more.



Befriending and volunteering

We provide a high-quality, free, face-to-face and telephone befriending service in partnership with the Wimbledon Guild. Emphasis is on volunteers supporting clients to reduce social isolation, empowerment and promotion of independence. We are also piloting a mental health befriending service.

We also offering volunteering opportunities across the organisation in a wide range of activities e.g., gardening, activity centre and administrative volunteers.

Foot health service

We offer a low-cost paid-for foot health service called “Happy Feet by Age UK Merton” to our clients.

About us

Age UK Merton

Income
£1,016,968 (2021/22)

Contractors
5–10

Staff
25

Volunteers
200

Support workers
20



William Barton / shutterstock

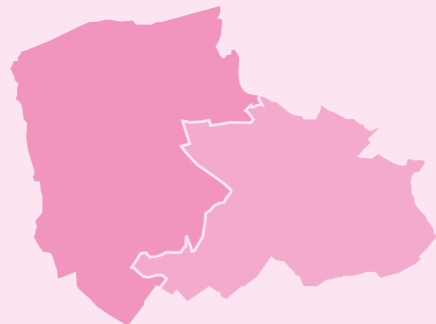
Local context

Merton

Total population
212,882 (2021)

Age profile

12.6% of the population is 64+ (compared to 11.9% in London) West Merton has a slightly higher proportion of older people than East Merton



Gender

51% female : 49% male

Ethnicity

In 2021, an estimated 79,352 people (37%) in Merton are from ethnic minority groups and a larger proportion of ethnic minority groups live in East Merton. Slightly more people of white ethnicity are in older age groups

Most commonly spoken languages



Data from Merton Story 2021: [merton.gov.uk/system/files/The%20Merton%20Story%202021_final%20\(1\).pdf](https://merton.gov.uk/system/files/The%20Merton%20Story%202021_final%20(1).pdf)

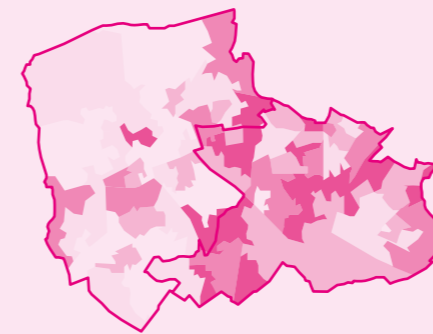


Challenges for older people

Merton

Loneliness

The risk of loneliness in older people is unequally distributed across Merton, with the highest risk being in East Merton



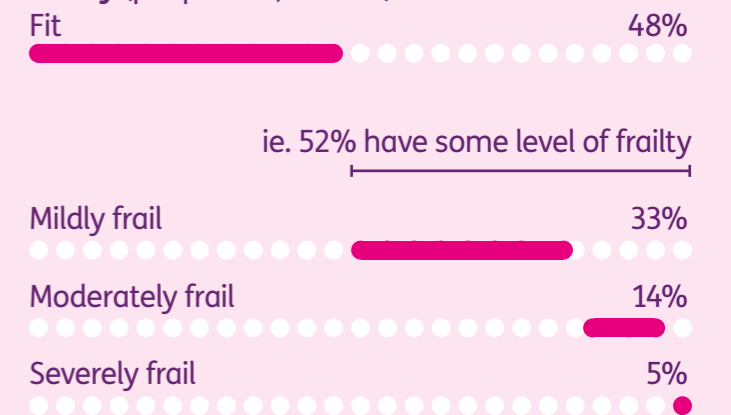
Dementia

Merton has a lower recorded prevalence of dementia (at 4.01 in 2020) in older people than London (4.17), but more than the national average (3.97) – social isolation experienced during lockdown really impacted those with dementia

Carers

Of an estimated 16,327 unpaid carers in Merton nearly one in five carers are older adults (18% were 65+, in 2019)

Frailty (people 65+, in 2018)



Developing our **strategic plan**

Reflecting upon the current position of the organisation, the local context of Merton, and the challenges older people in Merton face, we have been developing our new three-year strategic plan since August 2022.

We have taken an engagement approach which included:

- A Board away day in August 2022, reviewing our vision, mission and values at a strategic level
- An all staff away day in September 2022, identifying gaps/ issues, and ambitions for our client group and services, and the building blocks we need to address and achieve these
- “Have your say” open sessions with both clients and volunteers in early 2023, giving them an informal way to feedback on our proposed direction, and giving us the opportunity to listen to what is important to them going forward

These engagement activities have led us to identify our four building blocks for future success. We know we need to continue improving the full range of holistic health, wellbeing and social outcomes for older adults, whilst increasing our outreach and engagement with underrepresented groups and carers, and building pathways of support e.g., with local specialist dementia services. We need to continue to develop and support our workforce, whilst working on longer term sustainability to ensure continued delivery in an environment that is fit for purpose, with more secure funding.

Success within each of these four building blocks for the future is outlined in more detail over the next pages.



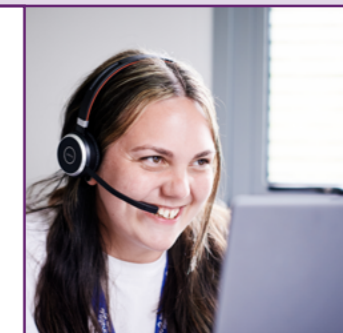
Building blocks for the future

Increasing outreach and engagement



Improving health, wellbeing and social outcomes

Developing our workforce



Ensuring sustainability

Increasing outreach and engagement

What we want to do and why

We want to find people in Merton who we haven't interacted with who have a real need for our support, particularly in underrepresented groups, in order to listen to them and support them. We will reach out across the borough beyond our base of operations in the East of Merton where there is greater socioeconomic need. We know that West Merton has an older population with the potential need for our services. We will continue to develop our relationships with our partner organisations in Merton both building upon pathways for our clients (e.g., dementia) and links with other valued support organisations e.g., Carers Support Merton.

Increasing our outreach and engagement is crucial to help reduce health inequalities in the borough for our client group, in particular targeting underrepresented groups. This will ensure a greater collective impact with both our statutory and non-statutory colleagues and our communities across the borough, efficiently and effectively finding people needing our help, care and support.

We will continue to engage with and feedback on programmes of work around anticipatory care, frailty, population health, and Actively Merton ensuring the wider voice of older adults is fed into system-based programmes designed to reduce inequalities and prevent poor mental and physical health.



Over the next three years we will:

- Use data sets to understand who might need our help and listen to more people's needs across the borough, through the implementation of an Outreach and Engagement plan
- Focus on capturing our client and volunteer feedback, developing appropriate opportunities for their discussion and input and becoming champions for our services, letting us know what needs to change or develop
- Use data and feedback to extend our reach and expand our service delivery as appropriate, maintaining quality and integrity of provision but looking at where else we can be based and provide services we know work across the whole borough
- Build stronger partnership and engagement relationships with other local community-based organisations and NHS and social care colleagues

Key outcomes

Increased numbers of unique clients annually, with a greater proportion from underrepresented groups to match local demographics per service

A quarterly older adult user forum will be in place, and client 'champions' or 'advisers' identified to support each team respectively

We will have activities and services operating across several locations in the borough, with strong partnership relationships

Improving health, wellbeing and social outcomes

What we want to do and why

We know there are key challenges for older adults in Merton including the impact of loneliness, frailty, and dementia amongst others. We want to continue to provide person-centred services, improving clients' physical and mental health and wellbeing whilst meeting other practical needs. It is also important to think about the outcomes for younger older adults and what might be important to them earlier on their journey, ensuring we both support digital inclusion for our younger cohorts but equally that we campaign against digital exclusion. Broadly we want to increase referrals and provide equity in access to services, supporting an open equality, diversity and inclusion approach.

We also want to further support improved outcomes around improving independence and autonomy, empowering people to be more socially connected, and financially stable with maximised income which is crucially important in the current economic climate.

Finally, we want our improved outcomes to be holistic and will work closely with health and care colleagues to ensure safe and efficient care around our clients and effective transition from one provider/sector to another as we look to influence and drive new approaches to service delivery. Overall if we can also demonstrate good outcomes this develops our reputation and enables us to secure further grant funding which in the long run benefits clients, staff and the organisation.

Over the next three years we will:

- Review our outcome measures across all services, implementing or improving them to ensure we have robust outcome monitoring and build up a more detailed evaluation and analysis of our outcomes to ensure we can stop doing things that don't work and do more of what does
- Create a flexible, responsive model of 'community support', greater integrating our existing services and ensuring we have the structures and processes in place to facilitate greater teamworking and efficiency to improve client outcomes
- Outreach and engage with younger older adults ensuring that in all we do prevention is key, improving outcomes earlier in a client's lifetime



Key outcomes

Robust outcomes in place and routinely monitored across all services, actively informing service provision/ development

Improved outcome scores for clients across all services

Increased numbers of adults aged between 50 and 65 accessing all services

Developing our workforce

What we want to do and why

We want to secure a highly functioning workforce. As our services grow and develop, we must build capacity and flexibility in our team, and provide a positive and supportive working environment that attracts and retains the best people.

This will enable us to deliver high quality, client-focused services that are responsive to increases in demand and the changing needs of our community. This will be within an organisation that values diversity, ensures development and recognition of staff, and makes best use of resources from a structure that is fit for purpose.

Over the next three years we will:

- Become an “employer of choice”, prioritising workplace wellbeing and further developing a positive organisational culture that values diversity
- Explore and implement innovative new roles, for example peer/ mental health support and apprenticeship opportunities, whilst further developing our work experience offer
- Develop a robust programme of training across AUKM including organisation wide mandatory training, team specific training and opportunities for individual development, with a key focus also on developing management potential in the organisation
- Enable staff to continue to have a key voice in developments, and sharing views and best practice



Key outcomes

- + Age UK Merton will be a London Living Wage accredited employer, with a comprehensive employee wellbeing and remuneration package
- Structured apprenticeship and work experience opportunities will be available
- A comprehensive training programme will be in place as well as a leadership / management development package
- A staff survey will be carried out annually, with a high overall satisfaction score from staff

Ensuring sustainability

What we want to do and why

We want to build upon existing strong relationships with current/ local grant funders and target new sources of grant, contract and fundraising income. We want to move away from a disproportionate reliance on year-to-year funding pots, whilst continuing to maximise our income.

We also want to make sure our Activity Centre is fit for purpose and future-proofed for the needs of the organisation, whilst keeping environmental sustainability at the forefront. This will ensure we are making the most efficient use of resources for the charity and stimulating a greater return on our investments to enable continued re-investment in ongoing service development. It will also ensure we have an effective base for a flexible and growing workforce, and an inviting and functional centre for a growing portfolio of activities and outreach across the borough.

This will all be in an environmentally designed welcoming community hub, engaging our local partners and the wider community into our work.

Over the next three years we will:

- Develop new income generating opportunities through the implementation of a sustainable fundraising strategy
- Support ongoing implementation of the Communications and Marketing strategy to maximise every opportunity to engage with clients, stakeholders and new potential supporters
- Fundraise for and implement developments to the Elmwood Centre



Key outcomes

- + Increased unrestricted income and a reduction in short-term staff contracts
- An increased social media presence and wider outreach/ engagement with our local community, with increased numbers of unique clients year on year across all services
- An improved Activity Centre, and progress towards becoming a “Carbon Neutral Organisation”, reducing our overall environmental impact and preventing waste



Implementing and evaluating delivery of our new Strategic Plan

Implementation of the strategic plan will be led by the Chief Executive Officer. A small project team will be established and will meet regularly to oversee its implementation.

The project team will ensure it continues to seek advice and input from clients, carers, families, volunteers, staff and other stakeholders. The project team will develop annual implementation plans containing actions required to support delivery of the three-year strategic plan. These annual implementation plans will align with the standard business planning and budget setting cycle.

Progress will be reviewed quarterly by the Board of Trustees. These governance arrangements are designed to monitor ongoing delivery, and to ensure the voice of older people in Merton remains at the heart of implementation. It is anticipated that there will be both successes and challenges in the implementation of the strategy, and Age UK Merton will continue to share and report openly on progress, providing an impact report annually.



Further information

We would like to thank all our clients, their families, friends and carers, our staff, Trustees, volunteers, and wider stakeholders in Merton who have supported us in developing this exciting new three-year Strategic Plan.

We would also like to thank anyone who has given money or fundraised for Age UK Merton, given us a grant, commissioned services from us or paid to have a service from us. Without you it would be impossible for us to continue to provide the support we do year on year.

If you are keen to help us in our new chapter, we are always looking for people to get involved with our great work by volunteering, fundraising or donating.

You can find more information on all these things here: ageuk.org.uk/merton/get-involved

Finally, if you would like any further information on our services or this strategic plan, including requesting versions in large print/ hard copy please call 020 8648 5792 or email info@ageukmerton.org.uk





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