AGE UK BOURNEMOUTH POOLE & EAST DORSET STRATEGIC PLAN 2025-2028

1. Introduction/background

Age UK Bournemouth, Poole and East Dorset was originally established in 1985 (incorporated 2005) as Age Concern Bournemouth, changing its name to Age UK Bournemouth in 2010 when the national Age Concern & Help the Aged merged. We then merged with Age UK Ferndown & District in 2019 and became Age UK Bournemouth, Poole, and East Dorset. Our charity exists to support people over fifty-five in Bournemouth, Poole, Christchurch, and East Dorset.

Like all charities, we are operating in a rapidly changing environment, presenting us with both challenges and opportunities. Factors that affect us include significantly reduced budgets for local authorities and the NHS, decreased donations, increase in demand for our services, regulatory and tax challenges, and the growing and evolving needs of the ageing population in our area.

What follows is an overarching strategic plan for our work over the next 3 years (2025-2028). It aims to offer a clear and convincing overview of our direction of travel and the reasons for it.

It is intended to offer a picture of planned operational activities, and to function as a framework for annual business planning, including more detailed work plans prepared by the Board of Trustees and Staff.

We want to make Age UK Bournemouth, Poole, and East Dorset a good place to grow older. We have already delivered, significant changes to how as a local charity we would work to achieve this. We constantly review and adapt our services and activities to meet the needs of older people in our area.

This strategic plan builds on the direction set and changes we started to make in 2018. This plan is for all our stakeholders, our volunteers, our staff, our partners and above all the older people of Bournemouth, Poole and East Dorset who we hope will need to join with us in embracing the potential of longer lives lived well.

Each year of this Strategic Plan will be underpinned by an annual business plan and budget; performance against targets of the business plan will be monitored by the Finance and People Management Committees, with findings and recommendations made at each Board Meeting.

The board of Trustees will work with the senior management team to monitor and review performance and progress against objectives and targets set out in the annual business plan and wider strategic plan to ensure they stay on track or evolve to reflect changing needs and priorities.

2. Our mission, vision, and values

This section lays out in simple terms our purpose as a charity; our vision for the future; what we will do to realise the vision and our values; and the principles that underlie how we seek to conduct ourselves in all our activities, from governance to service delivery.

Our Mission:

To make Bournemouth, Poole & East Dorset a place where later life is lived well.

Our Principal Objectives:

- To provide support and services to older people, and those who care for them.
- To reduce isolation, poverty, and health inequalities
- To promote positive ageing and independence by promoting and supporting active and healthy lifestyles
- To inform local older people and those who care for them of their rights and choices.

Our Vision:

For Bournemouth, Poole, Christchurch, and East Dorset to be an area in which everyone can love later life.

We aim to improve the lives of older people in our area by delivering services to provide support and encourage empowerment to improve lives and enable independence and wellbeing.

Our Values:

To be caring and compassionate: We will act with kindness, empathy and understanding and put people at the heart of what we do.
To be Respectful: We will listen to older people and treat them as individuals that are part of our charity.
To be Professional: we will maintain confidentiality and high standards throughout all aspects of our work.
To be accountable: We will ensure transparency and provide services that are value for money.
Valuing Diversity: We are committed to the principles of Diversity, Equity and Inclusion

Our Focus

To respond to our growing ageing population and to meet our mission we will:

- Employ skilled and experienced staff.

- Support, train and develop our staff in line with the needs of the charity and its service users
- Ensure the wellbeing and resilience of our workforce.
- Maintain a positive, supportive, and inclusive organisational culture.
- Deliver outstanding services by monitoring performance and seeking regular feedback from our clients
- Promote existing and new services and activities to reach more older people.
- Introduce new services and activities to help enhance their physical and mental wellbeing, finances, and quality of life.
- Use evidence and our expertise and experience to raise awareness of the needs of older people and influence wider service delivery.
- Implement a robust marketing plan which focuses on increasing brand awareness, promoting new and existing services, attracting new clients and working with other Age UK partner organisations to collaborate with us.
- Increase revenue through our chargeable services, grants, and donations. This will enable us to use unrestricted reserves to expand exiting services and develop new ones.
- Improve business partnerships and collaborative working across the Age UK Network
- Manage reserves to provide financial stability and the means to meet our charitable objectives for the near future.
- Determine the unmet demand for services in Poole, Christchurch, and East Dorset
- Align our ethos with the national charity with new to 'change how we age' The population is ageing, a greater proportion of us than ever before are older. Despite this, older people are facing significant challenges, and too often are completely unsupported.

3. Our Ambitions

We want every older person to

- Express their views and be listened to on matters that affect them and about which they care.
- Have easy access to opportunities and activities that enable them to lead a healthy, active, and fulfilling life, with the companionship and support they need
- Know about and have easy access to high quality, impartial and reliable information, advice, and advocacy when they need it and in the way they need it.
- Have access to advice and services to prevent people falling into poverty and to assist them to maximise their income via the benefit system.
- Have access to locally available, high-quality and affordable or free health and care services that meet their unique needs.

- Live in age-friendly communities and places where they are welcomed as active, equal participants and enabled by their communities to lead an active, healthy, and fulfilling life.
- be themselves, is accorded equal respect, and have equal access to services, amenities, and opportunities
- Be valued for who they are and the contributions they have made and continue to make.

4. Our Services

Age UK Bournemouth, Poole and East Dorset offers a range of services to support older people in our area. We work to reduce isolation, poverty, and ill health, whilst promoting independence and an active lifestyle. We will seek to develop new ways of working to offer more tailored, integrated services that meet people's needs and expectations during their journey through old age. This will include free services, some paid for services and income generating partnerships.

We offer a range of services and activities to meet the needs of older people in our area, combining their social, mental, and physical needs which includes

Information & Advice
Community Foot Care
Clinic Foot Care
Health & Wellbeing Services- Walking group, Yoga classes, Chair based exercises, Pub Clubs
Dementia Services – Cognitive Stimulation Therapy Sessions, Memory Clubs
Day Services- Dementia Day Centre & Let Us Connect Service
Shops
Community Connections
Befriending
Help at Home

5. Our Underlying Principles

We are a charity. We seek to make a distinctive contribution that adds to the local mix of services on offer to older people living in Bournemouth, Poole, Christchurch, and East Dorset.

We listen and learn. We will actively seek feedback and the views of older people and of those who care for them.

We seek greater financial independence.

We are against all forms of age discrimination and challenges unfair treatment based on age.

We recognise the diversity of older people and their diverse needs, choices, culture, and values.

We will build a healthy mix of income sources, including paid for services, contracts, grants, and fundraised/ donated income, so we are free to fund purely charitable work or pilot new work.

Our longer-term strategy seeks to give us a framework in which we can adapt and develop our services responding to the changing social, economic and political pressures while continuing to work within our mission and values.

6. Our Population

Bournemouth, Poole, Christchurch, and East Dorset have traditionally been a popular destination for older people both as a place to retire and a place to holiday. As a result, historically, our area has in the past had a larger proportion of older people. Net migration figures in Dorset are highest for those between 60-64 years old.

The population of those aged between 65 and 79 has grown by 20% between 2014 and 2024 and is expected to grow a further 14% to 2034. Those aged 80+ have grown by 23% between 2014 and 2024 and are projected to grow a further 38% to 2034.

The Old Age Dependency Ratio (OADR) is the number of people over 65 years old for every 1,000 people aged between 16 and 64 years old. In England and Wales, the OADR is 297, while in Dorset, it is 537.

Nationally, 29% of household growth from 2018 to 2043 will involve householders over 75. In Dorset, this figure is 110%. This suggests that Dorset will see a doubling in households in this age group whilst for age groups under 55 household growth will fall.

Life expectancy has been increasing at a slower rate in recent years. People aged 65 in Dorset can expect to live for a further 22.5 years for women and 19.8 years for men.

People are living longer and healthier lives. In Dorset, healthy life expectancy at 65 is above average. Women can expect 19 more years in good/fairly good health, and men 16 years.

The life expectancy gap between Dorset’s most and least deprived areas is 6.3 years for males and 5.3 years for females.

In Dorset, around 12,000 people aged 65+ are economically active and employed. This represents 11% of this age group, indicating later retirement trends.

Additionally, 7% of the economically active population in Dorset are 65 or older, compared to 4% in England and Wales. This highlights a growing reliance on older individuals within the workforce.

According to Census 2021 32% of the 35,500 unpaid carers were aged 65 and over compared to 23% for England and Wales. As the population ages there will be increased need for informal care.

Around 87, 000 people in Bournemouth are 65 and over, this has seen a growth of 12% since 2011. We have around 12,000 people 65 and over in Poole, East Dorset has approximately 88,000 residents 65 and over, 35% of residents in Christchurch are 65 and over compared to 18% nationwide.

The BCP area has become more diverse over recent years, as of 2021 91.3% of residents identified as White, whilst 2.8% identified as Mixed or multiple ethic groups, 3.4% identified as Asian 1.1% as black and 1.5% as belonging to other ethnic groups.

The prevalence of disability increases with age, 10.5 % of residents reported as being disabled. 45% of adults over state pension age are classed as disabled. This suggests that a considerable proportion of older individuals in our area may experience disabilities.

Health inequalities are the unfair and avoidable differences in people's health across social groups and between different population groups. In the Bournemouth, Christchurch and Poole council area people are generally healthier and live for longer than England overall. Latest life expectancy data shows women to live approximately 83.3 years and men 79.7 years.

BCP Council has a mix of high and low deprivation areas. Some areas, such as Sandbanks, Canford Cliffs, Christchurch and Broadstone fall within the least deprived areas nationally. In contrast, there are communities experiencing some of the highest levels of deprivation in Turlin Moor, Alderney, Turbary Common and West Howe, Boscombe and Somerford. Deprivation is strongly linked with many health outcomes.

7. Local Needs

A key driver for any local Age UK must be the nature of the demand it faces, and this plan has been framed with the particular needs in mind of the area we exist to serve.

We face considerable challenges owing to the increasing number of older people in the area. It is a densely packed conurbation, with higher population concentrations than most other areas on the south coast.

It has pockets of considerable poverty with more than 51% of households in Bournemouth, Poole and Christchurch affected by deprivation, and 50.1% in Dorset. With some communities ranking in the top 2% most deprived areas in England.

We have greater numbers of older people in hospital and being re-admitted to hospital for further treatment after discharge. With social care services stretched more than ever, with twice as many older people being kept in hospital due to lack of support back at home as the national figure.

8. Listening and learning

We cannot develop our organisation and its services without a sound evidence base. That is why as a charity we will 'listen and learn.' to the feedback from our clients, volunteers, and staff.

In September 2024, we held a staff 'away day' to gauge how the staff felt about working for us day to day and what they saw as the key challenges and opportunities. Their responses have been fed into this strategic plan.

During the last year we have been regularly sending out paper-based feedback forms and undertaking telephone feedback from people and their carers who are in receipt of our services. We plan to request feedback every month from 10% of people making enquiries or receiving services within that month.

9. Developing our organisation

Over the last three years we have worked hard to develop how our Charity works day to day.

For example:

We have invested money in new systems, structures and staffing to enable us to modernise the organisation so that we are fit for purpose.

We have collaborated in operating services with neighbouring Age UKs.

We have committed ourselves to achieving national Age UK's Organisational Quality Standard and CQC registration.

Overall, we believe our Charity is now well placed to face the future, and to expand its services to beneficiaries efficiently and effectively.

10. SWOT Analysis

During our staff & Trustee away days we looked at ourselves as an organisation. The following pulls some key themes identified in our discussions:

Strengths	**Weaknesses**
Committed, loyal and passionate Staff & Volunteer Team Strong Age UK Branding Strong financial reserves Wide range of services, meeting a range of needs Affordable services Good knowledge of local needs **Opportunities** Ageing population/ more demand on services Partnership working Expanding Services into other areas Aligning our services. Corporate engagement	Local Marketing/ Publicity Back-office support Cross selling between internal departments Fundraising Celebrating our volunteers **Threats** Loss of contracted Income Loss of funding opportunities New Age UK Network agreement allows other Age Uk's to work in our area. Government and Economic challenges Competition Increased compliance demands Staff and Volunteer shortages/ Increased demand on staff Unknown increase in costs

11. PEST analysis

Looking ahead, what broad political, economic, social, and technological trends in this coming period that our strategy may have to consider:

Key trend	Analysis
Political Factors	• Unstable political environment • Covid 19 continuing challenges • Changing social care polices and NHS funding. • Imbalance between demand and capacity
Economic Factors	• Economic uncertainties and ramifications of Covid 19 • Cost of Living Crisis • Shortfall in funding for the Local Authorises and NHS to meet the demand, leading to an increased demand on our charity. • The government economic agenda to reduce inflation and drive growth. • Continuing pressure on public finances
Social Factors	• Increase in mental health issues since Covid 19 • Increase in the cost-of-living crisis. • Increased ageing population requiring more health and social care. • The over 65's in our areas are above national average. • Higher demand for Care • Increased costs for Care Homes • High vacancy and staff turnover rates in social care sector

Technological Factors	• Continued Investment in our IT and phone systems. • Embedding our HR system to make the most of new developments and ways to support staff • Continued development of our website and social media channels • Continuing developing systems to support service deliver and extract data.

We are committed to making Age UK Bournemouth, Poole, Christchurch and East Dorset as distinctive in its ability to respond to older people's lives at different moments of need or crisis. Providing 'wrap around' support when and how older people and their families need it will be key.

If we are to meet these significant challenges in our operating environment successfully, it is clear we will need to develop our charity as a strong, adaptable, and self-aware organisation.

12. Financial analysis

The Charity remains reliant on two contracts with Bournemouth, Christchurch and Poole Council and the NHS. Whilst these are for services rather than for core functions, they make up a significant element of core funding and the Charity would be vulnerable should they cease or be reduced in value. The Charity has struggled to achieve a balanced budget in the last 3 years although it does hold sufficient reserves to enable it to respond in a measured and controlled way to reductions in important funding streams but addressing the underpinning reliance on the contracts remains the key objective.

We have been extremely fortunate to have received good legacy income since 2021 of just over £200K with this having a substantial impact on our income. This however still remains unpredictable and therefore we should not be reliant on receiving this income.

Anticipated reductions in BCP contract income necessitates funding and the diversification of more sustainable income being the main objective for this plan.

Since 2021 our reserves have managed to be maintained to an adequate level and the continued increase in the level of reserves is no longer a priority.

Investments have continued to increase steadily with an average growth of 6% each year.

Looking ahead, our financial vulnerability will increase, and this will become the chief risk to the Charity. Key elements to our strategy will be:

- To move towards 'mixed funding' with balanced income streams from variety of sources

- To maximise opportunities for community, trust & foundation, and corporate fundraising
- To increase paid for services

13. Our Financial Model

During our last 3-year plan period, we made a conscious effort to cease being over reliant on local authority and NHS contracts. We wanted to ensure that our services reached over our full area of benefit. It is our intention to have financial stability as well as ensuring that our core values are kept at the heart of what we do. It is not our intention to levy excessive costs onto our clients.

We will use various financial models to sustain our operations and provide services. They will combine multiple revenue streams to ensure financial stability and long-term impact. We make a conscious effort to not be over reliant on contracted Income and to ensure that our biggest income streams come from those raised through charitable activities such as our paid for services.

We have been fortunate to maintain local authority and NHS contracts, but we also are acutely aware of the financial pressures of the local authority in our area and the continuing pressures on the NHS.

14. What our clients tell us about our current provision.

We have valuable information from our clients about the quality of our services. Results from our client survey conducted in 2024 indicate that:

- 98% felt that our staff listened and understood their query or concern.
- 86% said our services were very easy or easy to access.
- 82% received a response from us either immediately or within 48 hours of their original contact.
- 93% reported that our services or activities had had a positive impact on their life.

15. Our Impact

Throughout 2024/2025 we offered support and services

This included:

- Taking over 19,628 calls from people needing information and advice
- Supported 569 people to apply for welfare benefits.
- We ran 19 groups per week supporting people with dementia.
- 610 people attended our Day Services
- Carried out over 4200 visits to older people’s homes to support with shopping, cleaning gardening or companionship.

- Provided over 3011 Community Connections or Befriending contacts or visits to people who are lonely and isolated.
- 3350 people attended our classes/ activities and Pub Clubs
- 983 people received Foot Care through our clinic.

16. Planning for 2025/2028

Following considerable discussion, the Board has researched a number of areas for income growth and development. This has led to the setting of a number of key strategic targets.

17. Target position by 2028

Diversification of income and a shift to more sustainable sources is the principal objective of the Charity over the next 3 years.

It is the aim of this plan that by 2028 income not related to contracts which is available to fund the core functions of the Charity will have increased.

To be a strong organisation and in a position to maintain & improve on operational delivery and outputs for the next 3years.

18. Outcomes (4 key areas)

	The Aim	The Reason	What we will do	The Outcome
Financial stability and efficiency	To remain financially viable by generating new sources of Income, reviewing and improving existing sources of income and introducing realistic organisational and service efficiencies to ensure a secure future for the charity	Age UK BPED wants to build towards a sustainable future where we operate within our means	Fundraising Strategy (to include grants/ contracts/ different funding streams) Identify Cross selling Opportunities. Review the prospect of further Retail Opportunities Review our Financial advisor (Investments) Review reserves policy.	Ensure there will be appropriate finances to fulfil our mission

Organisational Resilience	To develop a high achieving workforce of paid staff and volunteers within an environment that is beneficial to attracting and retaining people, offering an organisational culture that valves diversity and ensures that people are effectively developed, motivated, and compensated adequately and that their contribution is recognised and valued.	Age UK BPED wants to create a charity where we deliver high quality client-based services, focused on the needs of our clients and on the efficient, flexible, and environmentally sustainable use of our resources. Therefore, the workforce of paid staff and volunteers and the Board of Trustees need to have the skills and knowledge to deliver our strategic vision and take the charity forward	Undertake a training/ skills analysis. Undertake horizon scanning so we can look ahead, spot early warning signs of future risks and opportunities and prepare. Have people plan in place on how we will attract, develop, support, and retain our people. Have a resource plan in place to make sure we have what we need, when we need it. Undertake Staff satisfaction surveys	Staff and volunteers working for the charity are appropriately skilled, developed, involved, and engaged. To identify risks, threats, identify new opportunities, have increased organisational outcomes and improved strategic planning. To ensure we have the right people in the right places. Have an improved employee engagement and retention. Have a stronger organisational structure and a healthier and happy workplace. To ensure we have efficient use of our resources, have clear roles and responsibilities, ensure better project delivery, and improve risk management
Operational Excellence	To develop our organisation so it is operating in the best, most efficient and consistent way possible	To operate smarter, faster, cheaper and deliver better client experience	Review all IT & Phone systems. Recruit a marketing officer Create a marketing strategy Review organisational costs	To improve efficiency, overall performance, and cost effectiveness Increase in people accessing our services. Increase in Income, more volunteers. To reduce costs, process efficiency, minimise

			to achieve greater profitability & efficiencies.	waste, risk reduction and increase profitability for loner term stability
Service Delivery	To align our services to meet a greater need	Aligning services to meet the needs of olde people is critical for ensuring that they live healthy, independent, and dignified lives as they age	Digital Inclusion Welfare Benefit Service Carers support	To ensure that olde people have skills, access and opportunities to use digital technologies in ways that enhance their lives, it promotes independence and allows them to fully participate in an increasingly digital world. To help older people access financial support and essential services that improve their quality of life, ensure financial stability, and promote their well-being. Providing emotional and practical support to carers Provide advice and support to claim benefits. Peer to peer support groups

19. How we will measure our Progress:

Our strategic framework forms the basis of the organisation's Business Plan.

This is used across the organisation by our teams to articulate what they will do to meet objectives, what our timelines are for achieving these and how we are progressing.

The CEO supported by the Senior Leadership Team are responsible for delivery of the Business Plan and reporting progress to the relevant Subcommittees which in turn report to the Board of Trustees on a Bi- monthly basis.

This provides assurance that progress is being made as well as ensuring that the Trustees are aware of any challenges and can support mitigations where relevant.

Our Risk Register is also aligned with these objectives and the Business Plan which ensures that we are focussed on reducing our risks.

20. Risks to the achievement of these objectives

The Charity faces competition from other providers, both private and charitable. We do not to enter into needless and damaging competition with other charities, although some competition may be inevitable. Duplication of services should, where possible, be avoided and any potential new service or expansion will be assessed against other local provision.

As like many businesses we face ongoing operational challenges, if objectives are not met, staff, volunteers and clients may disengage making it harder to continue operations effectively.

Difficulty in increasing income sources could result in our objective not being met.

Unexpected rise in costs that are out of our control.