

# Strategic Business Plan 2024 - 2029



'Helping Dyfed love later life'





# Vision

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Age Cymru Dyfed works to enhance lives of people aged 50 and over in West Wales by working with them, their families, friends and carers to identify needs and respond with professional services and support.

We put people at the centre of everything we do. We ensure delivery of high-quality services and activities, cultivate choice, independence and dignity to enable positive change and encourage and value our employees and volunteers. This is a five-year Strategic Business Plan that will be adapted over time as the landscape for older people, and for Age Cymru Dyfed, changes. There is a degree of uncertainty as we look further ahead towards 2029 so our plans will be developed based on the learnings and knowledge acquired along the way.



# Mission

‘Delivery of outstanding, responsive and inclusive services.’

## Overview of sector

Age Cymru Dyfed supports residents 50 and over across Carmarthenshire, Ceredigion and Pembrokeshire. Changing demographics have driven need for increasing support a trend expected to continue, influenced by key factors:

- Projected increase of individuals 50+ in the 3 counties
- Increasing levels of deprivation
- National driver: Health & Social Care prevention emphasis
- Ongoing crisis in Care provision
- Increasing social isolation and loneliness
- Increasing frailty requiring preventative action
- Wellbeing as a factor in maintaining a healthy life

Ongoing restrictive financial climate with Local Authorities cutting back on services must be recognised as a threat.





# Strategic Priorities

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‘Service users get help when they need it’

## Reduce isolation and loneliness

What we will do to achieve this:

- Expand and develop befriending opportunities
- Develop prevention and early intervention delivery models in collaboration
- Expand community-based outreach/service delivery
- Increase awareness of and access to services that overcome rurality, poor transport links and offer language of choice
- Deliver digital inclusion services to increase communications and community engagement





How we will assess progress:

- Monitor and evaluate increased social engagement within communities
- review new prevention and early intervention delivery models. Survey and monitor individual reduction in loneliness and isolation as a result
- Review increase in community engagement
- Monitor uptake of health and wellbeing services
- Monitor number of people supported to get online and resultant improvement in their wellbeing

*We believe ageism is unacceptable, and proactively support the needs of older people to make a difference. We uphold the Welsh Government's Strategy for an Age Friendly Wales.*





## Improve physical and mental health and wellbeing

What we will do to achieve this

- Promote access to key benefits aimed at maintaining health and independence
- Increase access to paid for services
- Develop support around the home services
- Develop mental health and wellbeing services

*We believe people should have the support they need, when they need it.*





How will we assess progress:

- Monitor uptake of health-related social welfare benefits and entitlement
- Assess uptake of services
- Survey and monitor individual improvement in wellbeing
- Survey and monitor reduction of isolation and loneliness and avoidance of crisis points

*We believe people should have the support they need, when they need it.*



## Encourage and sustain independence, choice and control

What we will do to achieve this:

- Ensure effective promotion of our services
- Deliver holistic, person centred, co-produced services
- Promote opportunities for appropriate co-produced person-centred services
- Signpost relevant platforms and partners to access complimentary services

*We believe everyone has the right to a voice to exercise choice and control in their lives and diversity is to be valued.*





How we will assess progress:

- Evaluate marketing channels, reach and impact
- Monitor effects and outcomes of co-produced service provision
- Monitor number of services developed
- Record and analyse signposting.

We believe that everyone has the right to a voice to exercise choice and control in their lives and that diversity is to be valued.





## Reduce social, financial and digital exclusion and inequality

What we will do to achieve this:

- Increase awareness of and access to welfare benefits and entitlements. Help people to help themselves
- Proactively support reduction of fuel poverty and increase energy efficiency
- Deliver more community-based advice on how to better access services
- Provide digital support and training to people, support the switch to digital services
- Actively pursue funding opportunities to help those in need. Share new skills that can benefit individuals
- Help people become financially responsible

*We believe in being inclusive, involving, consulting and working together.*





How we will assess progress:

- Monitor increased uptake in relevant social benefits and entitlements
- Monitor take up of energy discounts, social tariffs, fuel bank vouchers and priority registers
- Monitor increase in number of community events held
- Review number of people supported
- Evaluate success in funding bids and new services delivered

*We believe in being inclusive, involving, consulting and working together.*





## Ensure sustainability and collaboration

What we will do to achieve this:

- Ensure our paid for services are reasonably priced and affordable
- Invest in technological innovation. Make better use of our resources
- Anticipate, prepare for, respond and adapt to changes and events that might affect our services and operations
- Develop new partnerships to expand and deliver services
- Maintain a financially responsible fiscal policy
- Work to make a positive impact upon our society, the economy and environment
- Retain our staff and volunteers

*We believe we should be open, truthful and ambitious.*





How we will assess progress:

- Review generation of sufficient resources
- Monitor success of new ways of working
- Monitor impacts using relevant stats and plans
- Record and review benefits of partnership and collaboration
- Monitor charity's financial position regularly
- Monitor impacts where possible
- Monitor retention, attract and retain talent.  
Review opportunities to gain skills and experience. Be a competitive fair pay employer.

*We believe we should be open, truthful and ambitious.*





## Deliver innovative services for a digital age

What we will do to achieve this

- Take full advantage of opportunities that may arise out of using innovative and progressive technology
- Further develop our digital approach and strategy

How we will assess progress

- Assess requirements for staff and volunteers to embrace these new opportunities
- Review efficiency gains, delivery of new services and reduction in costs of service delivery
- Publish, implement and review our approach to digitalisation





# Our values

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## Care and respect

Maintain our charitable ethos of care and treat others as we would like to be treated

## Ability to listen

Put older people at the heart of everything we do

## Responsibility and trust

Take our responsibilities very seriously and value the trust of our clients, staff and volunteers

## Resilience and innovation

Generate sufficient resources to sustain our activities through innovation

## Pride in what we do

Take pride in ensuring the delivery of high quality, professional services

## Going above and beyond

Do everything possible to ensure that our work enriches the lives of older people in West Wales



# What is Age Cymru Dyfed?

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## Charity information

In 2020, Age Cymru Dyfed was formed from the merging of three separate Age Cymru Charities within Dyfed which became Age Cymru Dyfed's area of benefit.

Dyfed comprises the three counties of Ceredigion, Carmarthenshire and Pembrokeshire. The charity currently delivers services throughout the three counties and seeks to respond to different pressure points in each county, i.e. housing in Ceredigion, income deprivation in Carmarthenshire and access to services and general health issues in Pembrokeshire.

- Information and Advice
- Support for People Living with Dementia
- Housing Support
- Older Veterans Support
- Befriending
- Digital Inclusion
- Home Support Services
- Advocacy
- Social Footcare Clinics
- Help for Carers

Over the next five years, Age Cymru Dyfed is expecting increasing demand for personal care, dementia services, support for unpaid carers and those living alone, and help for those affected by rural poverty.



# Management & Evaluation

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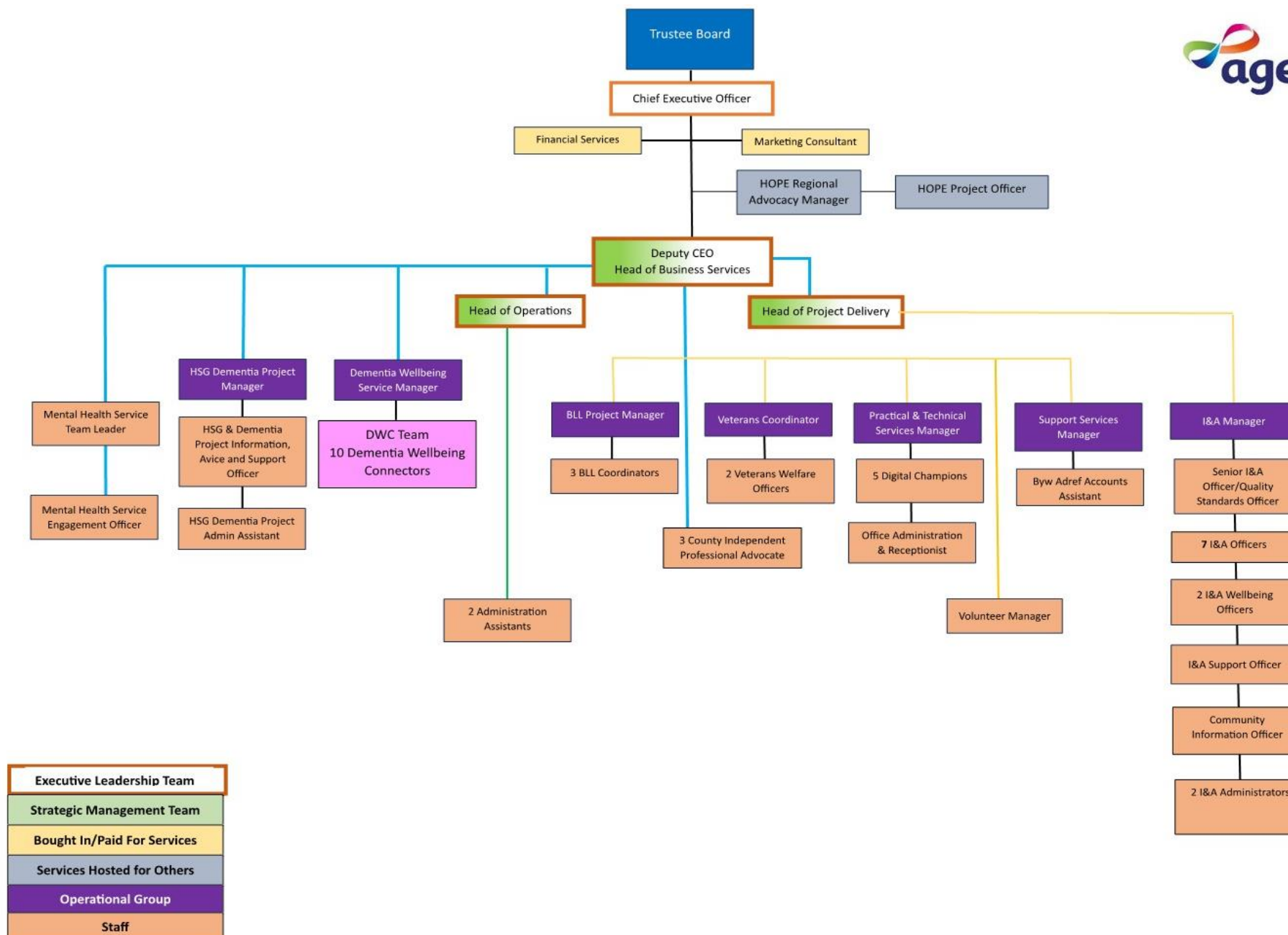
## Management, evaluation and reporting

Age Cymru Dyfed (ACD) has a Board of Trustees to monitor its strategic objectives. The Executive Leadership Team works closely with its Trustees to carry out the day-to-day running of Age Cymru Dyfed.

Age Cymru Dyfed reports on its activities and finances through its committee structure and the Executive Leadership Team. Quarterly reports are made available to the Board of Trustees to allow Trustees to assess strategic performance and results on an ongoing basis.

Age Cymru Dyfed also uses Charitylog which allows us to keep control of our case management and workflows, evidence our impact, report on service KPI's and produce data and manage our GDPR compliance.

Auditors are appointed annually at the Annual General Meeting and the Report and Accounts are available to the public on request or via the Charity Commission website. ACD is registered with the Charity Commission, the ICO and the Fundraising Regulator.





# Measuring success

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## How we measure success

Age Cymru Dyfed uses case studies and feedback from users to assess how well our services meet their needs and we are working towards using external researchers to gain impartial evaluation of our services. This will better inform our thinking on our client base as situations change over time.

ACD has attained the following Quality Standards:

- ✓ Investing in Volunteers
- ✓ Investors in Carers - Silver Award
- ✓ Armed Forces Covenant Employers Recognition Scheme Gold Award
- ✓ Information and Advice Quality Programme
- ✓ Advice Quality Standard
- ✓ Quality of Information and Signposting Standard
- ✓ Quality Performance Mark for Advocacy
- ✓ Charity Quality Standard

# Financial overview

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## How we handle our finances

Age Cymru Dyfed's financial forecasts are based on current activities continuing with inflation expected in each year and income increasing to largely meet inflationary pressures.

Restricted activities are mostly project related with associated incomes and direct and indirect expenditure for the delivery of specific services.

Contributions from Age Cymru Dyfed reserves will be used as appropriate to maintain current activity levels and Age Cymru Dyfed will endeavour to maintain its reserves and cash equivalent to at least six months of unrestricted expenditure.

Financial governance ensures regular monitoring of income and expenditure by Age Cymru Dyfed's Financial Services Provider, the Finance and Scrutiny Committee and the Trustee Board.



# Funders and income

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## Funders

Since the merger of Ceredigion and Carmarthenshire to form Age Cymru Dyfed in 2020, the charity has been dedicated to growth through securing long-term and sustainable funding. This strategic focus enhances the charity's resilience, ensures job security for staff, and promotes job retention.

## Income

*“Since the merger of Ceredigion and Carmarthenshire to form Age Cymru Dyfed in 2020, the charity has been dedicated to growth through securing long-term, sustainable funding. This strategic focus enhances our charity's resilience, ensures job security for staff and promotes job retention.”* Simon Wright CEO, Age Cymru Dyfed

# Risk

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## How we manage risk

The Trustee Board, management and staff continuously monitor potential risks facing Age Cymru Dyfed. The charity takes timely action to mitigate any potential damage using its Risk Management Strategy.

## Risk Management Strategy

The risk management strategy identifies the charity risks, appropriate control measures needed to manage them, then does an assessment of risk once the control measures have been applied - plus future controls that may be necessary to reduce the identified risk as far as possible.



# Table: Risk, Mitigation, Monitoring

Risk	Mitigation	Monitoring
<b>Financial</b> Economic and political uncertainty leading to difficulty in attracting funders Reductions in public service budgets Reduced long term funding commitments	<ul style="list-style-type: none"> <li>• Increase fundraising and raising of grant income</li> <li>• Maintain reserves to ensure service delivery and continuity</li> </ul>	<ul style="list-style-type: none"> <li>• Management Team and Financial Service Provider monitoring of bid success and income</li> <li>• Overseen by Finance &amp; Scrutiny Committee</li> <li>• Quarterly Trustee Board reports</li> </ul>
<b>Staffing</b> Ensure recruitment and retention of high-quality managers and staff Robust methods of covering key personnel absence	<ul style="list-style-type: none"> <li>• Comparative remuneration</li> <li>• Rewarding working environment</li> <li>• Staff empowerment</li> <li>• Training support</li> </ul>	<ul style="list-style-type: none"> <li>• Close monitoring by CEO and operational managers</li> <li>• Reporting to Trustee Board if required</li> </ul>
<b>Health and Safety</b> Protection of service users, staff and volunteers	<ul style="list-style-type: none"> <li>• Qualified and trained staff</li> <li>• Robust Safeguarding Policy</li> <li>• Accident reporting and follow up procedures</li> </ul>	<ul style="list-style-type: none"> <li>• Regular reports to Trustee Board</li> </ul>
<b>Safeguarding</b> Keeping vulnerable older people safe	<ul style="list-style-type: none"> <li>• Robust Safeguarding Policy with regular reviews</li> <li>• Awareness by qualified. trained staff</li> </ul>	<ul style="list-style-type: none"> <li>• Regular reports to Trustee Board</li> <li>• Annual reviews</li> </ul>
<b>Business Interruption</b>	<ul style="list-style-type: none"> <li>• Regular review of Business Continuity Plan</li> </ul>	<ul style="list-style-type: none"> <li>• Regular review by CEO</li> </ul>

Age Cymru Dyfed's focus is finding better ways to **help** older people who are **most in need**.

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## Contact details

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This Strategic Business Plan will be reviewed annually and is available in both Welsh and English.