

# Strategy 2025

Making Herefordshire and  
Worcestershire a great place  
to grow older.



# Executive summary

Welcome to Age UK Herefordshire & Worcestershire's Strategy 2025!

Our vision is to make Herefordshire and Worcestershire great places to grow older. This roadmap, built on our successful history of supporting older people, demonstrates how we will achieve this.

The environment in which we operate continues to change rapidly and is becoming ever more challenging as our population ages, and the number of older people with complex needs increases. This puts ever greater demands on our services at a time when the funding application process and reporting required by our commissioners is increasingly tricky to navigate, opportunities are limited, and fundraising is threatened by a cost-of-living crisis. Recruitment of staff and volunteers is hugely challenging across the sector and there is an ongoing need to support our people in the continued development of skills that will equip them to fulfil their roles effectively.

All this means that we need, as a Charity, to be flexible to possess the ability to respond quickly and to have an organisational culture that embraces change and fosters development. Underpinning this is the requirement to maintain our focus on robust financial management and strong governance.

This strategy sets out our objectives and how we will achieve them, outlining how we will create, and make the most of, likely opportunities over the next three years. Underpinning the document is our Business Plan which includes the detail of the actions and activities we will undertake. This is a live document that is regularly updated. The business plan is used to support operational and financial planning and regulate our management of risk.

# Foreword by our chair of trustees – Robert Rankin.



Our two counties offer a mix of urban and rural dispersed communities across two of the largest counties in England.

Just under 354,000 people over the age of 50 live in Herefordshire and Worcestershire (ONS, 2020), representing a growing older population and one that is older than average for England and Wales.

This context provides a backdrop for the increasing demand for our support and services and explains the challenges of providing a rich mix of activities in support of the diverse needs and interests of our older population.

**Our mission is to make a positive difference to the lives of older people across Herefordshire and Worcestershire, by promoting connections, enabling seamless access to advice support and services through awareness raising and advocacy. Each year we provide a range of support and services to over 15,000 older people.**

What we have been able to offer has, of course, recently been affected by the Covid-19 pandemic but we adapted to continue our support of older people, their families and carers. Our charity has increased its resilience throughout this very challenging period.

We are particularly focused on those activities which improve the quality of life for older people, their families and carers and shall continue to develop our services using a quality improvement approach, based on feedback from our clients.

The dedication of our staff and volunteer teams continues to be exceptional during a time when our clients need us more than ever, and we are very grateful for their commitment to maintaining a high standard of support in what are often challenging circumstances. We will continue to develop our management team by ensuring that they have the skills and knowledge to lead our people and develop confidence through leading improvements in our services.

Our work needs to be built on a strong infrastructure for us to operate safely and effectively, and we will continue to refine our approach to financial management, ensuring that our reporting is transparent and understood by our teams so that they are able to make full use of the information available to them.

Partnership working is increasingly important for us to ensure that the needs of our clients are fully met as well as to ensure that we make the best use of our resources. We continue to invest time in developing partnerships with public bodies across the sector, particularly as the Integrated Care System evolves locally.





We have an important role to play in advocating for older people and our membership of panels and boards means that we are well placed to do this.

We continue to be actively involved in Age UK regional groups focusing on developing fundraising, services and the volunteering elements of our work. Understanding the opportunities available to us as Age UK Brand Partners is important for us and we continue to maintain, oversee and respond to local and national initiatives and to work closely with our colleagues.

The Covid-19 pandemic has shone a spotlight on the need to understand how we can better support and reach clients who are in greatest need and we will develop our approach to data management to ensure that we can accurately identify under-represented groups as well as improving our engagement with a wider range of older people. This will give us better information, helping us to develop services where they are most needed, in the way that serves our communities best.



# Message from our CEO – Julia Neal



Leading Age UK Herefordshire and Worcestershire is a huge privilege and, looking forward to what we plan to achieve over the next three years, I know that we will meet every challenge that comes our way in order to better support older people across our two counties. Strategy 2025 provides the blueprint for our development as a charity, and sets out how we will make Herefordshire and Worcestershire better places to grow older.

The environment in which we deliver our support and services is changing rapidly. Now, more than ever, it is vital that we build on existing partnerships and seek new ones (where we have shared goals). This will enable us to extend our reach, particularly to those who need us most. We also need to make sure that we understand what support and services older people in Herefordshire and Worcestershire need, and to ensure that we involve them in designing and evaluating our offer.

We are fortunate to have come through the pandemic in a relatively strong position and are building on this, as well as looking for ways of making our services more sustainable. The way we work has changed forever, which means that it is crucial that we ensure that our IT infrastructure and data reporting is fit for purpose and supports our future aspirations. Most importantly, we need to invest in our people, who are our most important asset, and continue to make Age UK Herefordshire and Worcestershire, the great charity it is and will ensure that we can support more older people across our two counties.

We cannot achieve our strategy without a strong team to deliver it. Investing in our staff, culture and organisational development is a major part of this strategy. We want to support and develop our staff and volunteers in bringing our vision to life. We hope that implementing this strategy will mean that we enter our fortieth anniversary year in 2026, in a strong position to ensure that Herefordshire and Worcestershire are even better places to grow older.

# Our services

For over 35 years we have been working to improve the lives of older people in Herefordshire and Worcestershire. Built on a strong ethos of volunteering and engagement with local communities, the Charity has sought to work with older people, their friends, families and carers. We work with other statutory and voluntary sector organisations to identify the changing needs of older people. Our responses to those needs include the professional delivery of person-centred services activities and campaigns.

Supported by staff and volunteers we are committed to enabling individuals as they age to be able to experience more fulfilling lives.

We deliver a range of services in order to achieve our mission and fulfill our strategy. Over the next three years, we intend to develop our work in these services, allowing us to support more older people within Herefordshire and Worcestershire. Our services are aimed at:

## **Supporting older people to maintain their independence.**

As people get older, they may prefer to stay in their own homes and continue living within their community for as long as possible. However, for some people essential tasks can become more challenging and life at home can become less safe and manageable alone. We provide a variety of services to help people stay independent at home including:

- Help at home
- Home from Hospital
- Handyperson services
- Gardening
- Admin at home service
- Information and advice services
- Legal surgeries
- Footcare and podiatry services

## Supporting people living with dementia and their carers.

We have a variety of services to support people living with dementia and their loved ones, which makes up our Dementia Wellbeing Service. These include:

- Dementia Meeting Centres
- Dementia Cafés
- Maintenance Cognitive Stimulation Therapy (MCST)
- Post Diagnostic Dementia Support Service
- Young Onset Dementia Service

## Promoting opportunities for those who want to be physically and socially active.

We know that staying physically, cognitively and emotionally active is very important for older people and helps them remain independent and healthy for longer. Our activities include a variety of experiences to suit everyone, including:

- Walking sports
- Walking friends
- Community allotments
- Companion line
- Armed Forces Veterans telephone befriending service
- Reach Telephone Support for LGBTQ+ Community
- Gay Women's Group
- Computer Cafés
- Creative Arts Social Group





## Training those who support older people.

We also provide quality, up-to-date training courses for a range of professionals, organisations, families and personal carers. Each course is developed and refined through the first-hand experiences our trainers have had working day to day with our older population. Our training therefore provides us with another way of achieving our mission.

## Our values

Our values, which have been developed by our staff, volunteers and Trustees, define who we are, what we stand for and how we behave. They guide everything that we do and are the building blocks of our culture. We live our values: in our work with clients, our interactions with each other and our engagement with partners and stakeholders. They influence the services we deliver and hold us accountable. Helping us to deliver our best, every day.

## Age UK Herefordshire and Worcestershire Values:



## Our principles

### **Ageism is unacceptable**

We are against all forms of discrimination, challenge unfair treatment on the grounds of age and represent the views of older people to ensure that their voice is heard .

### **All people have the right to make decisions about their lives**

We help older people to discover and exercise these rights.

### **People less able to help themselves should be offered support**

We support older people to live their lives as independently as possible and in doing so will treat them with dignity and respect.

### **There is great value in collective action**

We seek partnerships and collaboration to increase our reach, support and strengthen our work and to enable us to achieve our vision.

# How we deliver

## Our people

At Age UK Herefordshire and Worcestershire, it is our staff and volunteers who make us what we are; from the people who work across our two counties to deliver support and services to our Board of Trustees, Senior Leadership Team and those working in our offices to support vital functions. We have:

## Staff

- 22 full time members of staff
- 52 part-time members of staff
- 25 casual staff

## Volunteers

- 158 volunteers

## Board of Trustees

Our experienced and dedicated Board of Trustees hold the legal responsibility for Age UK Herefordshire and Worcestershire. They provide advice, steer the direction of the charity and ensure that we can achieve our mission and vision. They are appointed for a renewable term of three years and are the directors of the Charity for the purposes of the *Companies Act 2006*.

They meet four times a year and delegate the day to day running of the charity to the Senior Leadership Team. They have approved and adopted our Conflict of Interest Policy, Code of Conduct and Scheme of Delegation, which underpins the governance of our Charity.

## **Our funders**

As an independent charity, we rely on a number of different types of income to finance our activity. We are very grateful to everyone who supports us financially which enables us to deliver our vital support and services to older people in Herefordshire and Worcestershire. We strive to be open about how we are financed and how we use our income. Our income comes from...

### **Commissioners**

Much of our income comes from Local Authorities and the NHS who commission our services, such as footcare and home support.

### **Grant giving trusts**

There are a number of local and national funders who provide grants to charities who support older people and we have been successful in applying for funding which supports a number of our projects.

### **Clients**

A number of our services are chargeable and clients pay a fee which contributes to the cost of provision.

### **Donors**

We also welcome individual donations and encourage fund raising activity .

## **Our Space**

We have an office at Malvern Gate, Lower Wick, in Worcester, which provides space for some of our activities such as foot care and computer clubs. It is our head office and the majority of our office-based staff work here for part of their week.



We also have an office in Ross which provides a base for our Herefordshire team as well as a space for clients who require face to face support and a have facility at Drybridge in Hereford.



It is important that for those clients who benefit from face to face support and take part in our activities, that we provide these opportunities locally. We use a number of venues across the two counties to hold Dementia cafés and meeting centres. We also have allotments in Pershore and Worcester.



# Preparing for the future – the changing needs of our population

Understanding the needs of older people in Herefordshire and Worcestershire is vital for us to be able to plan effectively. Our ongoing research of these needs must underpin our Strategy.

This knowledge comes in part from the context of our changing population but also importantly from the feedback of our clients as well as information ventured by people who are not currently in receipt of our services. This may be because they do not require our support, but it is likely that it is also because they are not aware of the support that is available or that what we provide does not suit their needs.

The number of people identifying as White British in our two counties is higher than average and the number of people identifying as Black or Minority ethnic is lower than the national average. The number of people from Traveller communities is higher than the national average.

We know that the number of older people living in our two counties is going to increase significantly over the next few years and that **by 2030 the number of people in Worcestershire aged 80 – 84 will increase by 51% and the number over 85 will have increased by 35%<sup>1</sup>**. The number of people aged over 70 will also increase significantly and this is particularly the case in Wychavon, where the increase will be 30%. In Herefordshire the number of people aged over 85 is set to increase by 55%<sup>1</sup>. **The number of people aged over 65 makes up one quarter of the population in Herefordshire and this is set to increase.**

Loneliness and isolation is a significant and increasing problem for our population.

In Worcestershire the number of people between 50 and 59 years of age, who provide the majority of informal care, are decreasing<sup>1</sup>. This is significant because those people without an informal carer-giver are more likely to need support. It is also likely to impact on the number of people who find themselves isolated and lonely, both of which impact on health and increase the likelihood of requiring support from the voluntary and community sector.



Dementia rates will also rise, as the risk of developing the disease increases from 1:14 in those over 65 to 1:6 in those over 80. An increase of 30% in the number of people over 70 and living with dementia is expected by 2030 and rates in Wychavon will be the highest in Worcestershire.

**In Herefordshire the number of people living with dementia is set to rise by 71% by 2035<sup>2</sup>.**

The number of people living with at least one long term condition will also rise as the number of older people increases. The number of people over 65 living with a long-term condition will increase by 24% by 2030 in Worcestershire, with rates in Wychavon again being particularly high<sup>1</sup>.

The number of people living with severe frailty will also increase, rates in Worcestershire rose by 15% between 2012 and 2022 and in Herefordshire by 17% in the same period<sup>1</sup>.

In summary, the population of Herefordshire and Worcestershire is becoming older, with rates of frailty and long-term conditions also increasing. The impact of this on the statutory and voluntary sector will be significant, particularly given the likely reduction in informal carer support.

It is clear that the projected rise in older people and those living with dementia and frailty will mean that we will need to continue to respond innovatively and increase our reach during the period of this strategy and beyond. Other factors will impact on our ability to support more older people, these include:

- Ongoing cost of living crisis and rising inflation
- Austerity
- National drive to integrate health and social care with a focus on prevention
- Urgent care
- Crisis in provision for older people resulting due to rising eligibility criteria and drive towards care in the community
- The recognition of frailty as an indicator for required preventative action to tackle obesity and reducing the number of people who are active for less than an hour a day
- The drive towards creating new positive approaches to ageing
- The realisation that and individuals' wellbeing plays a key role in maintaining a healthy life into old age



# 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 carried out in 2022 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
- 71% received a response from us either immediately or within 24 hours of their original contact
- 93% reported that our intervention had had a positive impact on their life

Our clients also told us: that they would benefit from reinstating our Handyperson Service, that some were struggling to meet the cost of the paid for services we provide and that a more diverse group of volunteer befrienders would be welcomed.

## Our Impact

Every year we offer support and services to over 11,000 people. This includes:

- Taking over 4,000 calls from people needing information and advice
- Supporting people to apply for benefits totalling over £1 million
- Helping over 600 people with dementia and their families
- Carrying out over 11,000 visits to older people's homes to support with shopping, cleaning and other errands
- Providing over 3,000 befriending telephone calls to people who are lonely and isolated
- Training over 1,000 people to deliver high quality care to older people

# Our Strategy

This Strategy has been developed as an interactive process, using a range of consultation methodologies including facilitated discussions at our Trustee's Away Day, focus groups with staff and volunteers, feedback from clients and analysis of data. The focus of this work was to better understand what older people are likely to require from the support and services that we offer, and therefore plan the direction this will take.

We have also taken account of the Herefordshire and Worcestershire Joint Local Health and Wellbeing Strategies and the priorities outlined in the Herefordshire and Worcestershire Integrated Care System Strategy.

Our Strategy has four objectives which provide a strategic framework for our activity:

**1. Promote a positive attitude to ageing**

leveraging the needs of older people, developing awareness of, and building support for, our work.

**2. Ensure the highest standards of support and services**

which promote independence and address the needs of all older people.

**3. Remain robust and adaptable as a sustainable organisation**

to deliver our Strategy and Business Plan.

**4. Develop and grow our workforce**

ensuring that the charity is a great place to work and volunteer.



# Strategic Framework:

Objective	How we will achieve this
<b>1. Promote a positive attitude to ageing, leveraging the needs of older people, developing awareness of, and building support for, our work.</b>	
Treat all adults fairly and with respect, promoting their needs and opportunities to influence.	<ul style="list-style-type: none"> <li>• Supporting our people to respect others and their values, ensuring that equality, diversity and inclusion is integral to all that we do.</li> <li>• Promoting communication that embodies a positive attitude to age and ageing, which encourages those who need support to ask for it.</li> <li>• Maximise opportunities for listening to the views of older people, ensuring that our own decision-making processes are well informed and that we are truly representative of the communities we serve.</li> <li>• Making better use of opportunities for advocacy and influencing, and providing a voice for older people and their needs.</li> <li>• Influencing at all levels of health and care delivery to promote an evidence-based approach to healthy ageing.</li> </ul>
Build on our brand and develop our support, increasing the diversity of our income streams.	<ul style="list-style-type: none"> <li>• Developing an effective and efficient fundraising function to support community giving and events.</li> <li>• Building a robust and professional approach to grant fund raising which is embedded across the organisation.</li> <li>• Maximising opportunities for in memory giving supported by an effective communication strategy.</li> <li>• Delivering a retail plan to provide a strong unrestricted income stream and increase awareness of what we do.</li> <li>• Developing a co-ordinated approach to corporate giving which supports our work.</li> </ul>
Increase awareness of the opportunities available to older people and communicate the impact of our work.	<ul style="list-style-type: none"> <li>• Maximising the potential for social media to share our activities.</li> <li>• Developing our people to be Age UK champions.</li> <li>• Increasing the number of people with whom we communicate directly.</li> <li>• Improving our presence at public facing and business events.</li> <li>• Maximising the use of the Age UK brand.</li> </ul>
Extend our reach to ensure that those whose need is greatest have access to our information and services.	<ul style="list-style-type: none"> <li>• Improving our capacity for using data to target need, especially where there is limited engagement.</li> <li>• Developing our offer to include meeting the specific needs of younger-old and older-old.</li> <li>• Promoting partnership working to meet need more effectively especially in harder to reach and rural areas.</li> <li>• Developing localised approaches to engaging with stakeholders</li> <li>• Making best use of the Age UK Network.</li> </ul>

<b>2. Ensure the highest standards of support and services which promote independence, tackle inequalities and address the needs of all older people.</b>	
Provide information and support to older people through cohesive and trusted service provision of a consistently high standard.	<ul style="list-style-type: none"> <li>• Reviewing activity to determine cost effectiveness and impact.</li> <li>• Understanding the need for investment in infrastructure to support development.</li> <li>• Developing a robust and transparent costing and charging model to meet the needs of all our clients.</li> <li>• Ensuring our structure is fit for the purpose of delivering our services effectively.</li> <li>• Promoting a culture of quality assurance and feedback.</li> </ul>
Develop new areas of activity to reflect best evidence and the needs of older adults and to support our growth.	<ul style="list-style-type: none"> <li>• Developing services embedded in communities, reflect local needs and priorities and effectively tackle inequalities.</li> <li>• Ensuring relevant stakeholders are involved in the design, delivery and evaluation of new services.</li> <li>• Expanding existing services to support demonstrable need Providing support and business planning to promote successful service development.</li> <li>• Understanding the impact of the Brand Partnership Agreement and working with stakeholders to ensure that the needs of older people are met.</li> </ul>
Support those working with older adults to develop high standards.	<ul style="list-style-type: none"> <li>• Providing training to support those working with older people within health and social care.</li> <li>• Ensuring that the training offer is high quality, relevant and up to date.</li> <li>• Supporting those delivering our training to develop the skills required to be effective.</li> <li>• Understanding the impact of our training on the recipients and the people who they care for.</li> <li>• Developing the skills required to be an effective lead provider.</li> </ul>
Develop and support partnerships to extend opportunities for service delivery.	<ul style="list-style-type: none"> <li>• Valuing trusted relationships with partners with aligned values and vision.</li> <li>• Providing co-ordination to bridge the gap between the voluntary and statutory sector, promoting integration across the sector.</li> <li>• Seeking opportunities for informal collaboration and mergers to better support our strategic intentions.</li> <li>• Participating in district-based initiatives to improve support and services for older people.</li> <li>• Develop wider collaborations with organisations outside health and care delivery such as faith groups and emergency services.</li> </ul>
<b>3. Remain robust and adaptable as a sustainable organisation to deliver our Strategy and Business Plan.</b>	
Develop effective systems and financial controls which support our work effectively and support our long-term growth.	<ul style="list-style-type: none"> <li>• Ensuring our financial systems, policies and procedures are fit for purpose.</li> </ul>

	<ul style="list-style-type: none"> <li>• Developing a proactive approach to financial planning and forecasting which underpins our Business Plan.</li> <li>• Ensuring full cost recovery models for commissioned and paid for services unless explicitly planned.</li> <li>• Developing an investment policy.</li> <li>• Adopting a robust approach to our reserves policy, ensuring that we are financially sustainable.</li> </ul>
Ensure our governance and data collection collation and reporting is fit for purpose.	<ul style="list-style-type: none"> <li>• Reviewing governance policies and procedures.</li> <li>• Ensuring robust systems, data and evaluation which support effectiveness, efficiency, sustainability and provides appropriate reporting and assurance at all levels.</li> <li>• Developing processes to ensure that the outcomes of services and activities are captured to demonstrate impact.</li> <li>• Supporting Board effectiveness and development to ensure a culture of effective challenge and oversight.</li> <li>• Achieving best practice in accordance with the Charity Governance Code.</li> </ul>
Develop an infrastructure including premises reflecting the organisation's needs and support reduction in our carbon emissions.	<ul style="list-style-type: none"> <li>• Reporting on environmental impact.</li> <li>• Committing to and introducing strategies to reduce our environmental impact.</li> <li>• Understanding our requirements for premises to support our needs now and in the future.</li> <li>• Making best use of our premises to ensure effective working and maximising the wellbeing of our people.</li> <li>• Developing opportunities to share workspace to increase our reach.</li> </ul>
Ensure IT resources and platforms enable staff and volunteers to work effectively demonstrating activity and impact.	<ul style="list-style-type: none"> <li>• Developing Cyber security measures to protect our people and resource.</li> <li>• Ensuring our IT infrastructure supports the developing needs of our organisation effectively.</li> <li>• Improving digital literacy in our people.</li> <li>• Developing robust communication strategies to ensure that we provide regular feedback about what we are achieving.</li> <li>• Embracing new technologies which support us in achieving our vision.</li> </ul>
<b>4. Develop and grow our people, ensuring that the charity is a great place to work and volunteer</b>	
Provide fair and transparent recruitment, retention and employment practices.	<ul style="list-style-type: none"> <li>• Ensuring an approach to recruitment which clearly differentiates our offer and articulates our culture and values.</li> <li>• Supporting our people, using evidence-based retention strategies, throughout their relationship with us.</li> <li>• Developing a volunteer pathway which recognises their unique skills and requirements and supports their contribution effectively.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensuring that the organisation is supported by robust policies which are clearly articulated, understood by our people and inform practice.</li> <li>• Understanding and measuring the effectiveness of our recruitment and retention strategies.</li> </ul>
Support the health and wellbeing of our people.	<ul style="list-style-type: none"> <li>• Promoting health, safety and wellbeing as integral to our activity.</li> <li>• Ensuring effective engagement drives the development of wellbeing interventions.</li> <li>• Providing wellbeing training to our people to ensure that they are confident to provide initial support and signposting.</li> <li>• Ensuring that the wellbeing of our people is regularly monitored.</li> <li>• Reviewing and updating our Human Resources system, policies and procedures to ensure that they adapt and respond to the needs of our people.</li> </ul>
Promote a culture of learning and development.	<ul style="list-style-type: none"> <li>• Ensuring all our people engage in an effective and timely appraisal and development planning process which is explicitly linked to our Business Plan and empowers staff to develop and progress in their role.</li> <li>• Equipping our managers with the best information, training, advice and support to develop their teams.</li> <li>• Developing robust systems to ensure that organisational development planning is articulated, actioned and evaluated annually.</li> <li>• Ensuring an effective approach to succession planning which takes account of local and national trends.</li> <li>• Prioritising digital literacy for all our people.</li> </ul>
Communicate effectively recognising the commitment of our people.	<ul style="list-style-type: none"> <li>• Sharing our vision and purpose to promote support and engagement.</li> <li>• Recognising volunteers as key to achieving our mission.</li> <li>• Developing a comprehensive reward and recognition package that is clearly understood and articulated.</li> <li>• Making explicit our approach to organisational development and our commitment to our values.</li> <li>• Developing effective internal communications and evaluate our approach.</li> </ul>

# 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 quarterly 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.



## References

1. ONS (2022) National Population Projections: 2020 – based interim
2. Understanding Herefordshire (online) Ageing Population





[www.ageukhw.org.uk](http://www.ageukhw.org.uk) 0800 008 6077

Malvern Gate, Bromwich Road, Worcester. WR2 4BN.