

Strategic Plan 2023 - 2026



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Executive Summary

Welcome to Age UK Lindsey's new Strategic Plan

In October 2019, Age UK Lindsey produced our last three year Strategic Plan. When this plan was launched, no one realised that only six months later the world would change and we would be hit by a global pandemic, which would cause huge disruption to our charity and made the Strategic Plan no longer fit for purpose.

Following the Covid crisis and then a 'Cost of Living' crisis; caused in part by a war in Europe and spiralling fuel costs, our charity has had to re-assess when the time was right to launch a new three year Strategic Plan.

We feel this is the right time and our new plan is optimistic and builds on our previous successes, whilst taking into consideration the changes and challenges we face as a charity.

Our new Strategic Plan continues many of the successful achievements previously put in place, particularly the emphasis on partnership working and focusing on doing what we do well. It is a three year plan and gives focus to what we will do as a charity over the next three years, acknowledging the changing world we exist in.

The next three years are key within the history of our charity and at its core this Strategic Plan reaffirms our mission and ambition to help make later life a fulfilling and enjoyable experience for older people in East and West Lindsey and North Lincolnshire.

A Word from the Board

For over 30 years Age UK Lindsey has worked to improve the lives of older people and we will aim, over the next three years of our new Strategic Plan, to provide support to help local older people to live healthier, happier and more independent lives within the resources available to us.

We will aspire to deliver high quality activities and services and to meet the needs of older people, their families, friends and carers to identify changing needs and respond with the professional delivery of person-centred services, activities and campaigns.

Supported by our dedicated staff and volunteers and through our partnerships with key organisations, we are committed to enabling

individuals as they age to be able to experience more fulfilling lives and to 'thrive'!

The Board recognise that the next three years will be challenging and we are determined to continue with strong governance and sensible financial management, to ensure we can still offer excellent local services with community at the heart of everything we do.

**On behalf of Age UK Lindsey
Board of Trustees**

Chief Executive's Introduction

For over 30 years Age UK Lindsey (previously Age Concern Lindsey) has been supporting older people in East and West Lindsey and since 2017 supporting North Lincolnshire, by delivering a wide range of services in the home and community, which reach out to older people in need and who really benefit from our support.

Our work happens in a rapidly changing environment and our strategic direction must allow room for change. Our strategic plan has been written with the intention of being adaptable and account for emerging opportunities.

What will remain constant, however, is that our services, projects and activities will continue to support the needs of older people, with our aim of helping those who are socially isolated, feeling lonely, or are vulnerable or experiencing poverty, to enjoy their later years as best as possible.

Because our charity has existed for over 30 years working in local communities, we have a deep understanding and experience of the kind of issues and problems older people are facing and we are dedicated to providing a range of services, information and practical help to overcome the worries and difficulties that are faced in later life.

Like many charities, we face the challenge of finding funding to resource the services we deliver. It is difficult and is becoming more difficult every year with the continued rise in minimum wage and running costs, but we do the best we can.

Our Strategic Plan 2023 – 2026 responds to the changing landscape we face as government policy, the economic climate and the changing needs of our beneficiaries mean that we need to adapt and innovate. We need to build strong relationships with key partners to enhance the services we deliver, whilst remaining an independent charity in our own right.

There will be big challenges over the next three years, as the need to generate more income to meet the demands of an increasing older population and the continued rise in running costs, including the minimum wage, continue to put our finances under pressure.

We are also looking at how we improve our digital approach and find new ways of delivering services to our clients. It will be these innovations which will help the charity become what we all want it to be and ultimately provide the quality of service that our beneficiaries require.

Andy Storer
Chief Executive Officer, Age UK Lindsey



Andy Storer, CEO Age UK Lindsey receiving a cheque for £3128.60 from Claire Parker-Robson at Wilkin Chapman Solicitors

“We are positive and optimistic about the next three years and beyond, but recognise the challenges we have to meet in order to maintain the standards expected of this charity and the decisions we will need to make in order to maintain financial stability and growth.”
 Andy Storer, CEO

About Age UK Lindsey

Age UK Lindsey provides services in the Lincolnshire district council areas of East Lindsey and West Lindsey and also North Lincolnshire, covering an area of **3766km²**, with large areas of rurality and coast as well as some key urban towns such as; Skegness, Mablethorpe, Louth and Horncastle in East Lindsey, Gainsborough, Caistor and Market Rasen in West Lindsey and Scunthorpe, Brigg and Barton upon Humber in North Lincolnshire.

1991	Age Concern Lindsey as it was then known, was established by a group of dedicated people determined that older people should have better services, meeting in offices at St. George's Hospital in Lincoln.
June 1996	The charity relocated to The Old School House (TOSH) on Manor House Street in Horncastle and in April 2010, the Board of Age Concern Lindsey agreed to become a Brand Partner of the new national charity Age UK, which formed as a result of the merger between Age Concern England and Help the Aged.
1996	The charity became known as Age UK Lindsey and has continued to operate as a local, independent charity and Company Limited by Guarantee.
2021	During the height of the Covid-19 pandemic we managed to survive immense challenges, including the temporary closure of our 8 leased Charity Shops across the Lindsey and North Lincolnshire area and closure of our 'paid for services' due to Covid restrictions, losing income for 7 out of 12 months. We were very proud to stay in business during this time, despite having to make some very difficult decisions, including cessation of our Independence at Home and Community Transport services and we still managed to celebrate our 30th anniversary, with 'virtual' celebrations taking place!

Mission, Values & Social Impact

Mission

- To promote and improve the wellbeing of all older people 50 and over, with a focus on those who are 65 and above, helping make later life a fulfilling and enjoyable experience by tackling loneliness, isolation and poverty.

Values

- We are caring, fair and respectful, in the way we treat people.
- We are accountable, transparent and open, in the way we run our charity.
- We are inclusive, positive and welcoming, in everything we do.

Enablers

- Volunteering.
- Developing Digital Maturity.
- Excellent Fundraising.
- People and Organisational Development.
- Financial Stability and Efficiency.

Objectives

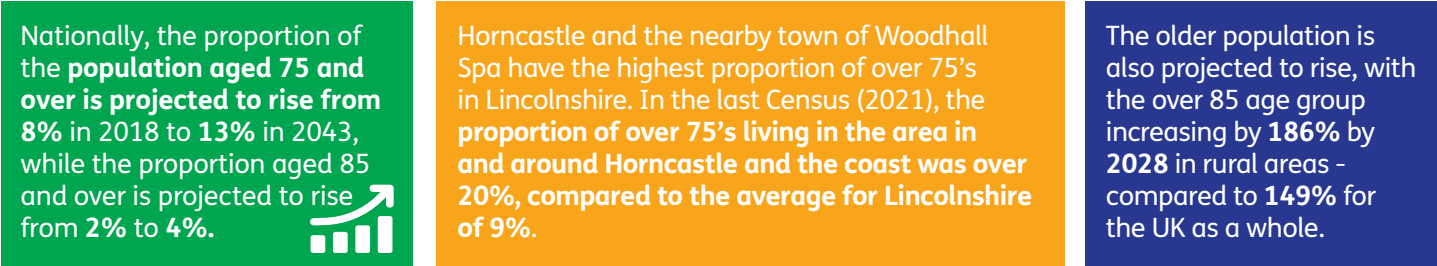
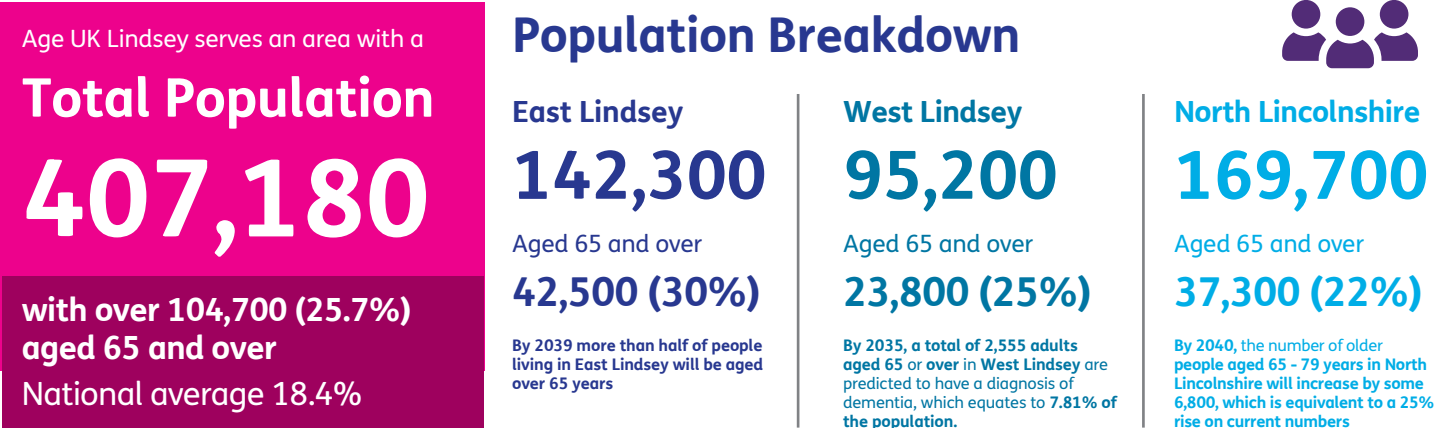
- To support older people to thrive at home for as long as possible.
- To support older people to be healthy and well in later life, enabling more years to be spent in good health.
- To help reduce levels of loneliness and isolation and the negative impact on health and wellbeing by supporting older people to be socially active and connected.
- To develop a range of interventions and services that can help older people to develop their resilience in challenging times.
- To work closely with older people to ensure they can influence and campaign on issues that can help change the narrative around ageing and older adults.

In order that we are maximising the resources needed to deliver our objectives and priorities, we are developing strategic partnerships with key organisations such as Lincolnshire Fire and Rescue, Magna Vitae and Carers First and also working with other local Age UKs such as Age UK Lincoln and South Lincolnshire, so we can have a more joined-up approach to service delivery.

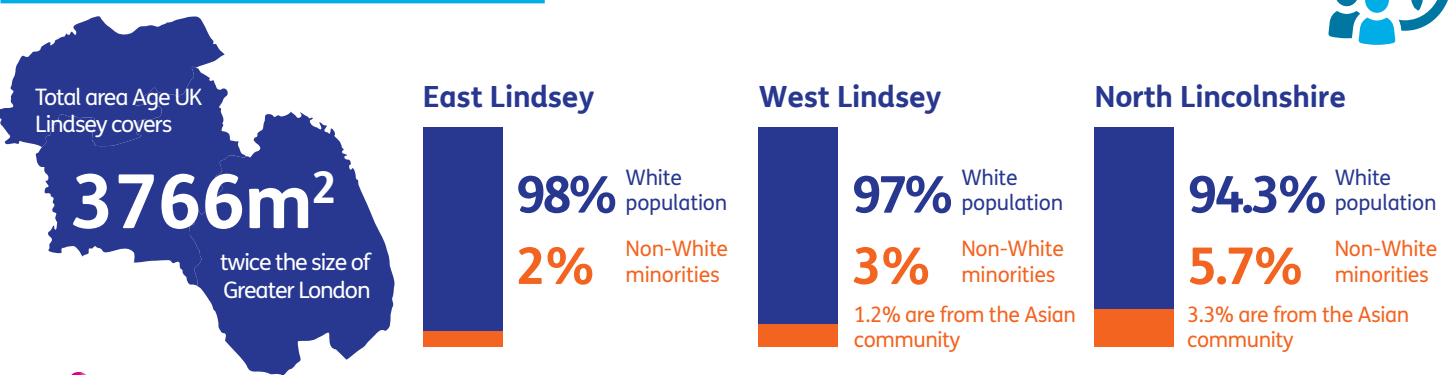
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Key Facts

Some key facts about older people in the Lindsey area which have informed this Strategic Plan and the way we target our charity resources



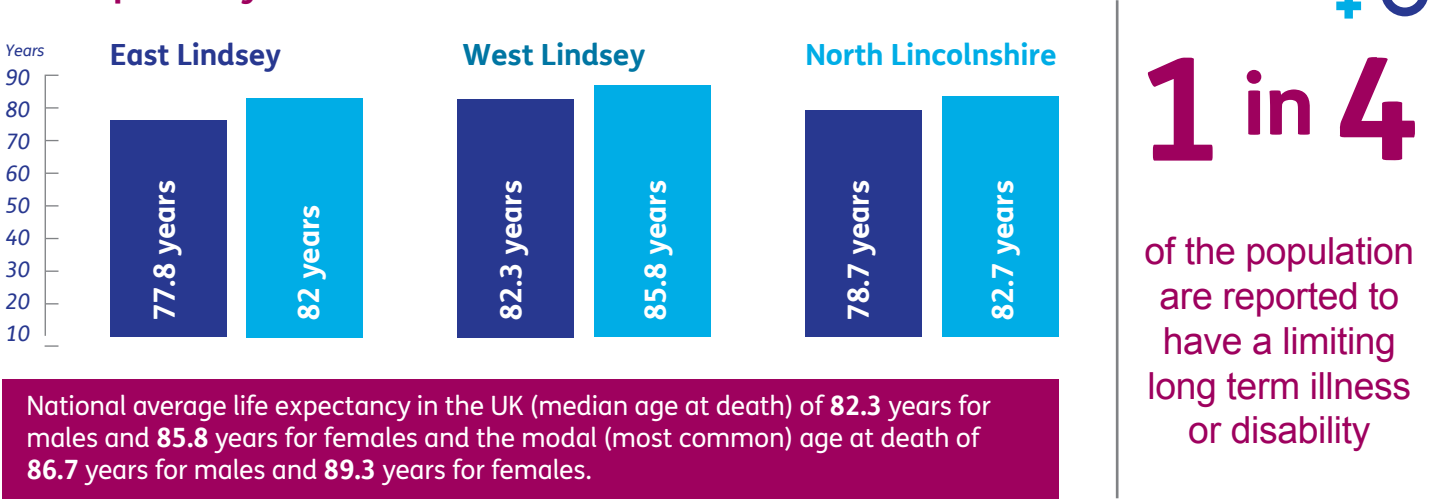
Size and diversity of our area



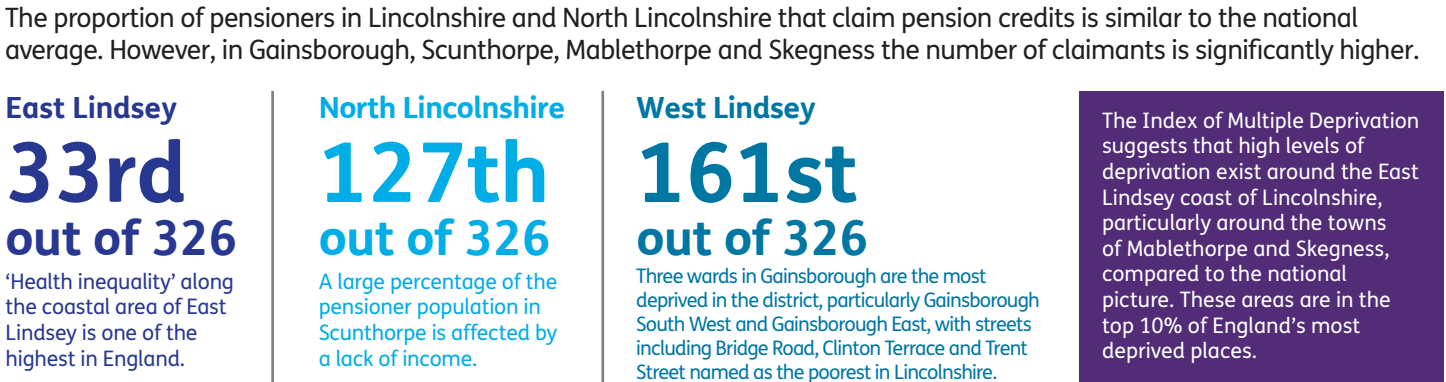
Health of our area



Life Expectancy



Deprivation within our area



SWOT Analysis

STRENGTHS



- We have committed and professional staff drawn from the local area.
- We have over 160 volunteers working more than 10,000 hours per year for the charity.
- We have an experienced and responsible Board of Trustees.
- We are able to generate income from our network of charity shops.
- We are clear about the issues facing our clients and deliver 'needs led' services.
- We have shown resilience to survive Covid when many other charities have closed.
- We have a very well-known and good local reputation.
- We are a brand partner of one of the best known charities in the UK.

OPPORTUNITIES



- We want to develop our approach to digital technology, in particular around fundraising.
- We want to positively develop our digital approach to better support our staff, volunteers and clients.
- We want to develop better strategic partnerships with other key and like-minded providers, including Age UK.
- We want to expand our social enterprise activities.
- We want to expand our range of services and activities.
- We want to be seen as the leading local charity for older people.
- We have an increasing number of older people in our area who require services and our support.
- We need to review how services are delivered and better focus resources.

WEAKNESSES



- We need to improve the publicity and promotion of our charity as a local concern.
- We need to develop our financial sustainability including strong stakeholder partner relationships, diversified funding, sufficient cash, realistic and justifiable levels of unrestricted reserves, robust risk management, and awareness of overheads.
- We need to be better at fundraising and income generation to support our future sustainability.
- We need to build our staff and volunteer capacity to manage current demand and deliver more services and activities.
- We need more income to continue delivering services at current level.

THREATS



- We need to be able to respond to the political, social and economic changes affecting our clients and wider sector.
- We need to be more aware of who our competitors are and who our partners need to be.
- We need to ensure better income generation, increase reserves and reduce reliance on our shops as the largest source of income.
- We need to strive for excellence and not become complacent or risk averse.
- We may not be able to deliver our services at current levels without more income.
- We need to be in more suitable and accessible premises for back office functions and delivery of services.

PESTLE Analysis



Political

- Unstable political environment.
- Covid-19 continuing challenges.
- Changing social care policies and NHS funding.
- Imbalance between demand and capacity.



Social

- Mental health issues as a result of Covid-19 and the 'cost of living crisis'.
- Increased ageing population requiring more health and social care.
- Rising automation resulting in increased isolation.
- The over 65's population in Lindsey and North Lincolnshire is higher than the national average.
- Higher demand for care for the elderly along with increasing costs for care homes.
- High vacancy and staff turnover rates in the social care sector.



Legal

- Government intention regarding the repeal of EU regulations and whether they replace them with UK-drafted alternatives. These include:
 - The Working Time Directive.
 - Procurement and competition law.
 - Regulation of medicines and medical devices.
 - Regulation to enable common professional standards in medical education.
 - The transition from the European Human Rights Act to the proposed British Bill of Rights.



Economic

- Economic uncertainty and the ramifications of Covid-19.
- Cost of living crisis.
- Shortfall in funding for the NHS to meet demand, leading to increased demand on our charity.
- The Government's economic agenda to reduce inflation and drive growth.
- Continuing pressure on public finances.



Technological

- Continued implementation of good communication and digital technology systems.
- Continued investment in IT and moving from a physical server to the 'cloud'.
- Continued investment in our new client database – Salesforce.
- Embedding our new HR system (Sage HR) to make the most of new developments and ways to support staff.
- Continued development of our website and social media channels.



Environmental

- To reduce the environmental footprint of the ageing population of our area by promoting greener attitudes and behaviour, sustainability and individual lifestyle choices.
- Continued recycling of donated clothes and bric-a-brac through our shops.
- Continued disposal of clothes that we cannot sell using textile recycling companies – giving additional income.
- Consideration of the environmental impact in the projects we develop.

Finance

The charity income sources are currently derived from:



Over the next three years, it is likely that finance will remain a real challenge for the charity and new ways to generate income will have to be secured in order to meet the needs of an increasing older population in our area.

We need to develop our financial sustainability including strong stakeholder partner relationships, diversified funding, sufficient cash, realistic and justifiable levels of unrestricted reserves, robust risk management and awareness of overheads.

The aim is to have an operational surplus within the third year of the plan and we will need to identify additional sources of income for projects. Age UK Lindsey are pro actively fundraising and seeking grant funding, to enable service delivery to continue in what is a difficult time for charities. These grants supplement the income from our successful network of charity shops across the region.

We will also look at what efficiencies and innovations can be found within our operations over the next three years to improve sustainability of services, whilst maintaining quality. Digital technology will play a huge part in this and finding new ways to support our service delivery and capacity will be vital.

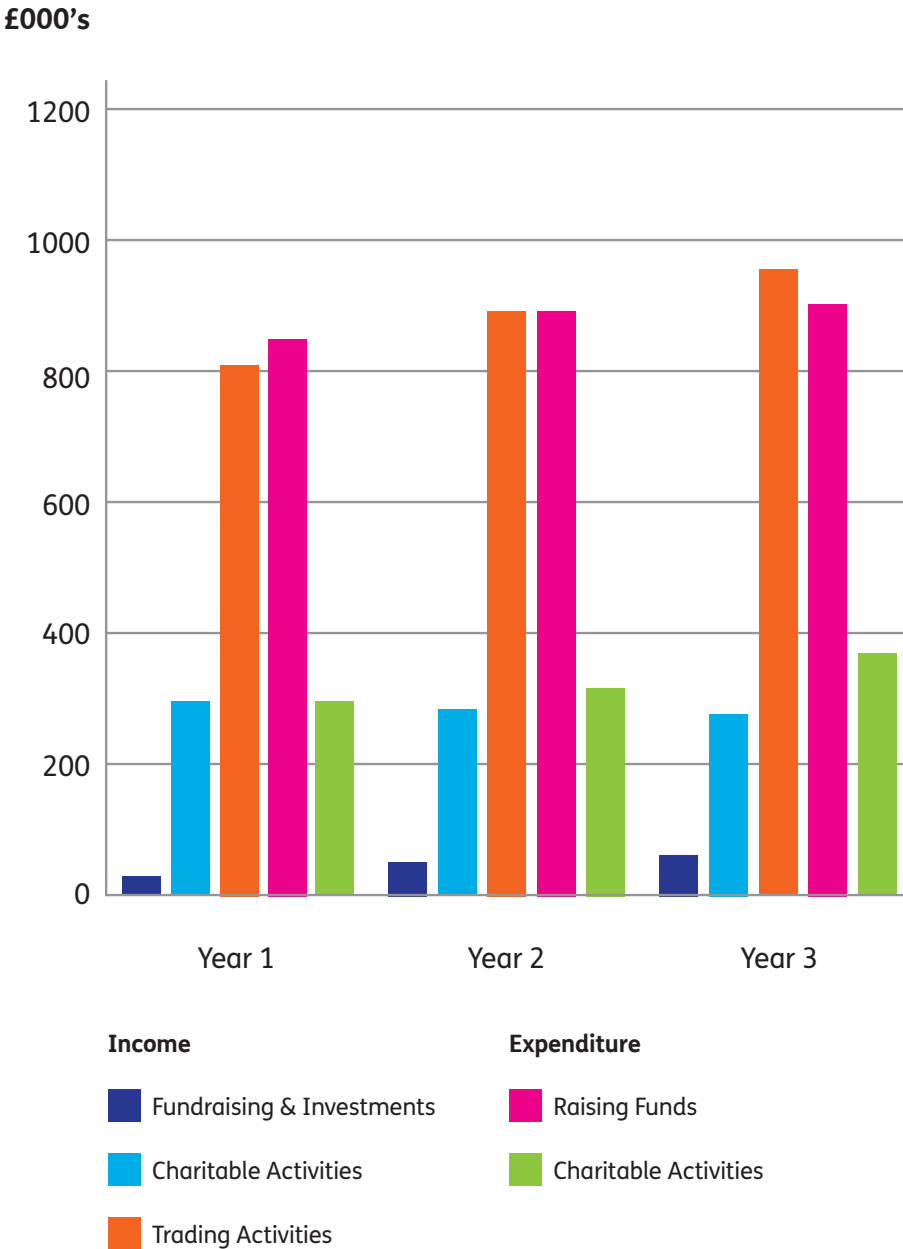
Over the next three years Age UK Lindsey will move towards all of our services being self-sustaining by operating a full cost recovery model, enabling the charity reserves to be used to develop new services.

Finance Chart

During the lifespan of the strategic plan, it is likely that funding will remain a challenge for the charity and therefore it is imperative that we control our finances to ensure:

- **Our unrestricted income keeps up with the pace of growth**
- **Our services continue to develop, grow and innovate**
- **Our systems and infrastructure can support and facilitate growth**

Our aim is to have an operational surplus by the end of year three, utilising efficiency and innovation in our operations to improve the sustainability of services, whilst maintaining quality. Digital technology will play a huge part in this, but we will also continue to pro actively source income from fundraising, grants, legacies, paid-for services, charitable activities and our shops.



Age UK Lindsey's Focus for Service Delivery

Over the three year life of this Strategic Plan, Age UK Lindsey will have a more targeted focus on several key areas of service delivery, which we feel will bring the most benefit to older people and be the best use of charity resources.



Single Point of Contact – THRIVE Team

In our last Strategic Plan (2019 – 22) we had said that we would commit to a 'Single Point of Contact' approach to managing client contact. This is now in place and all enquires coming into the charity asking for service support, come via our Client Support Team (**THRIVE Team**).

Over the next three years, the **THRIVE Team** will be responsible for the day-to-day coordination of service requests coming into the charity, aiming to help alleviate client frustration, leading to increased customer satisfaction.

THRIVE stands for **T**ogether we will support older people to stay at **H**ome and **R**emain **I**ndependent by reducing **V**ulnerability through positive **E**ngagement (**THRIVE**).

The **THRIVE Team** will enable us to give a person-centred approach to our clients and manage interactions more effectively and efficiently. The aim is to increase client satisfaction and confidence in the services and support we provide and for us to better understand the issues our clients are facing.

The **THRIVE Team** will also have a key focus for the following area of concern for older people.

Safe and Warm Homes

Age UK Lindsey can help older people stay safe and warm within their home. Our Safe and Warm Homes Programme will aim to help and support older people to maximise their income, improve energy efficiency and to stay warm and safe during the winter months.

Our Safe and Warm Homes Plan will target the most vulnerable and 'fuel poor' older people to offer help to those who contact or are referred to our charity.

We class a vulnerable older person as someone who is over 55 years of age, with a focus on those 65 and over and have at least one of the following:

- a low income (means-tested benefits or on an income below £16,190 per annum).
- a long-term health condition.
- lives in a 'hard to heat home'.
- has been a victim of a scam or fraud or is worried that they might be at risk of a scam or fraud.



Scams Awareness

As well as struggling with the cost of living crisis, we know that many vulnerable people are at risk of being targeted by scams and fraud, as unscrupulous people see opportunities to take advantage of older people when they are at their lowest point and therefore we will also look at initiatives that can help prevent and support victims and potential victims of scams.

Age UK Lindsey are a 'Friends Against Scams' organisation and this will help older people know they are getting a trusted person in their home.

Along with the focus on scams through our THRIVE Team we will, during the first year of the new Strategic Plan, pilot a scheme in the north of our area where we offer support and advice to victims and those identified as potential victims of scams and fraud.



Information, Signposting and Advice Service

The provision of Information, Signposting and Advice, free to customers at the point of service delivery, will again remain a key charitable service for Age UK Lindsey over the life of this Strategic Plan and is one of the main requirements of our Brand Partnership Agreement with the national Age UK charity.

The Age UK Lindsey Information, Signposting and Advice Service is extensively used and very highly regarded by our clients.

In 2021/22, our Information, Signposting and Advice Service delivered nearly 6000 hours to over 1000 clients referred to the service. The service made over 3986 telephone calls and visited many vulnerable older people once the Covid restrictions eased.

Most of the enquiries we received were regarding the cost of living and entitlement to means tested and health related benefits.

Due to the involvement of our Information, Signposting and Advice Service team we secured over one million pounds of unclaimed benefits for older people in 2021/22 across our area; although because of a reduction in the capacity of our team this is less than in previous years, we are still aiming to secure at least one million pounds of unclaimed benefits every year during the life of the new Strategic Plan.

This still places us as one of the leading Information, Signposting and Advice Services in the East Midlands Region, rivalling many larger Age UK's across the country.

Our Information, Signposting and Advice Service currently holds the Age UK Information and Advice Quality Programme (IAQP) and we aim to secure this again during the next three years of our Strategic Plan, along with the new Quality of Information and Signposting Standard (QISS) as we aim to continue our high level of performance.

The service also provided information on a wide range of other topics, such as residential and non-residential care and housing issues.

Age UK Lindsey's Information, Signposting and Advice Service is currently delivered through a range of telephone contacts, home visiting and community drop in's and this will remain a key priority for Age UK Lindsey over the next three years.



Befriending Service

The provision of a Befriending Service will remain a key charitable service for Age UK Lindsey over the next three years, providing companionship for isolated older people and the opportunity for them to develop new relationships and be supported to participate in social group activities.

Mental health

The Befriending Service offers both one-to-one support and opportunities to help older people engage with others through social activities such as Friendship Groups and Coffee Clubs. Currently, we have over 60 volunteers working to support the service and we deliver over 300 hours per month of support.

Over the next three years, we will especially target support on the East Coast of our area through funding we have received, with a focus on those 65 years and older, who are at risk from loneliness or social isolation.

We will also signpost clients to other services offered, such as those delivered by Age UK Lindsey and also by other key partner organisations.



Keep Connected Service

The Keep Connected Service will offer support to older people living in East Lindsey, West Lindsey or North Lincolnshire who are at risk of social isolation or exclusion because of where they live or due to lack of digital resources or digital knowledge.

This service includes a number of projects, all designed to ensure that older people can keep connected in a growing 'digital world' and have equal opportunity to access information and support and our other services.

Mobile Outreach Project – The Keep Connected Infobus

The Keep Connected Infobus is our Community Outreach Support Project. We make visits to locations across East Lindsey, West Lindsey and North Lincolnshire; such as supermarkets, community centres and local markets. We offer the opportunity to meet our staff and volunteers for free information about our services, to find out more about volunteering opportunities and ask us for help with getting online and improving digital skills.

We are often joined by other local service providers, including Lincolnshire Fire & Rescue, Lincolnshire Police, the Safer Neighbourhoods team, Magna Vitae and Carers First, ensuring that older people have access to information about topics that are important to them.

Digital Support Project

Age UK Lindsey are part of a group of other local Age UK's taking part in a Digital Support Project with the national Age UK charity. It will be a priority to secure further funding to ensure we can continue to deliver digital support to older people.

The project will strengthen digital leadership within the charity and produce an agreed digital strategy for the charity to implement.

Tablet Loan Scheme

In addition to the digital skills support we offer, we have also rolled out a Tablet Loan Scheme, so that older people can borrow a tablet with internet connectivity on a loan basis. This allows them to 'give it a go' and improve their confidence ahead of making the decision about buying their own technology.

Home Support, Gardening and Deep Clean Service

Age UK Lindsey and Age UK Lincoln and South Lincolnshire have been working closely with one another in different ways over a number of years, more so recently when we worked together to deliver the Volunteer Visitor Host project funded by Lincolnshire County Council.

We have identified the benefits to both older people and to our organisations by exploring this approach further by working in partnership to provide a much needed Home Support and Deep Clean Service across Lincolnshire, helping more older people to remain independent in a home of their choice for longer.

This partnership approach will provide 'Home Support' such as light domestic cleaning, shopping, prescription and pension collection.

The service will also provide Gardening and a 'Deep Clean' service to clients who might be struggling to keep on top of hygiene in the home, or are returning from hospital and needing additional support to clean the house.

All of the Home Support Assistants will be insured, DBS checked and regularly supervised.

Community Social Activities

We will look to provide social activities within local communities, which can help address isolation and loneliness. This will include linking with targeted care homes to deliver activities which help stimulate and engage and providing Friendship Groups and Coffee Clubs in targeted areas, such as along the East Coast and in rural locations. We will also have a focus on older people with dementia.

Dementia Support

Over the next three years of this Strategic Plan we will be looking at how we can better support older people living with dementia. Through our services and projects, we will look at ways in which we can support both those with dementia and those in a caring role. This will be through identifying staff and volunteers who will be our 'Dementia Champions', offering information and signposting for those needing more help and also having specific activities such as Friendship Groups giving support to those suffering with dementia and their carers.

Fundraising and Events

Age UK Lindsey will provide opportunities for our staff, volunteers, supporters and membership to come together to celebrate the work of the charity, raise money to support the work of our charity and find out more about the services we offer, whilst bringing local communities together.

We will identify new ways to fundraise, including digital fundraising and harness the enthusiasm of staff, volunteers, partners and supporters within local communities.

The charity will aim to deliver **four** key events on an annual basis, including our Summer Festival, Staff and Volunteer Awards and our Annual General Meeting with Christmas Fair, along with one other major fundraising event.

Charity Shops

Our Charity Shops are in the heart of local communities offering employment and volunteering opportunities, whilst providing a gateway into our services with customers having the opportunity to ask about what we do as a charity, or by picking up a leaflet or information sheet.

For those who volunteer in our charity shops it can help tackle depression and loneliness. Research carried out by the Royal Voluntary Service has shown volunteering can reduce feelings of depression and social isolation and improve satisfaction with life.

Our Charity Shops provide high quality items at affordable prices, generate income to support our charitable services, recycle and reuse unwanted donated items, employ people from the local economy and provide a community interaction for our volunteers and customers.

Online Selling

We are looking to develop our online selling during the next three years of this Strategic Plan. We currently have a Charity eBay Shop and we are looking at how we can better support this and improve income.

We will also look at other ways we can utilise online selling over the next three years.

Key Strategic Priority Areas

Creating this Strategic Plan has been a comprehensive and robust process involving trustees, staff, volunteers and clients. We have identified five key strategic priority areas that we will focus on over the next three years.



Thriving at Home



Healthy and Well



Socially Active and Connected



Resilient in Challenging Times



Influencing and Campaigning



Thriving at Home



Over the next three years our aim is:

To support older people to thrive in their home for as long as possible.



Our reason for this is:

Older people tell us that maintaining their independence and continuing to thrive in their home is very important to them as they grow older, even when they need help to manage their day-to-day tasks.



The key outcome will be:

Older people will remain living independently for longer and be less likely to need to go into hospital or care.



Our goals over the next three years to achieve this are:

To deliver home support, deep cleaning and gardening services to older people in their own homes, through a partnership approach with Age UK Lincoln and South Lincolnshire.

To develop a new Trusted Trader Scheme so older people can find trusted local tradesmen or tradeswomen, who have been assessed and endorsed by Age UK Lindsey.

To continue to deliver safe and warm home projects supporting older people to thrive in their own homes, including providing energy saving advice and practical ways to stay warm for those at risk of fuel poverty.

To further develop the Organisational Accounts Database (OAD) of local statutory and non-statutory partners for onward referral and signposting of clients who need help from other services.

To develop a new Handy Person Service to support older people with small, practical jobs to make their lives easier and safer.



We will know we have succeeded when:

We have consistently increased the number of older people receiving home support, deep cleaning or gardening services across East Lindsey and West Lindsey over the three years of this Strategic Plan and received 85% satisfaction rating from clients.

We have identified a range of local tradespeople, who can provide ‘trusted’ help to older people in our area by January 2025.

We have received 90% positive feedback by April 2024 from those older people who have been supported during the winter months through our safe and warm homes projects; such as the Warm Homes Programme and our Winter Warmth Packs.

We have been able to provide a range of support to vulnerable older people through signposting and referring clients to other services and the most appropriate sources of community help over the three years of this plan.

We have developed a new Handy Person Service across targeted areas by September 2024.



Healthy and Well



Over the next three years our aim is:

To support older people to enjoy a healthy later life, enabling more years to be spent in good health with positive mental wellbeing.



Our reason for this is:

We know that older people tell us that having good health and good mental wellbeing in later life benefits them and the whole of society, by maintaining older people's social and economic contributions, minimising the cost of care and improving quality of life.



The key outcome will be:

Older people will stay healthy, active and independent for as long as possible through accessing support, which will sustain their physical, mental and emotional health and wellbeing.



Our goals over the next three years to achieve this are:

To provide opportunities for older people to access health and wellbeing activities through developing a partnership with Magna Vitae Leisure and other key partners.

To provide accessible information and signposting on a range of social activities and health and wellbeing related topics to support older people to enjoy the best possible quality of life and find the right services (often in their local area) to support them.

To focus our resources on those older people with the highest identified needs to ensure they receive the highest levels of support.

To support older people to understand the wellbeing benefits of volunteering and finding suitable volunteering opportunities as they grow older.

To actively promote Health and Wellbeing Campaigns being run locally and nationally, which support older people to stay healthier in later life.



We will know we have succeeded when:

We have a Memorandum of Understanding in place with key partners which enables us to signpost older people to physical or emotional wellbeing activities across our joint area of benefit by January 2025.

We will have provided clients with information and signposting on a range of social activities and health and wellbeing related topics to support them to remain healthy and well over the three years of our Strategic Plan.

We will have mapped the areas of greatest health inequality across our area by December 2023 to ensure we can deliver targeted interventions, which make best use of charity resources.

We have seen a 15% increase from our current baseline number of volunteers aged 65 and over volunteering for our charity by the end of this plan.

We have actively promoted through our social media and our website, a minimum of two campaigns per year, highlighting the need to be healthy and well.



Socially Active and Connected



Over the next three years our aim is:

To help reduce levels of loneliness and isolation and the negative impact on health and wellbeing by supporting older people to be more socially active and connected.



Our reason for this is:

Older people tell us that being socially active and maintaining positive social connections, is central to their wellbeing and health. Having contact with friends, family and others fulfils a natural human need to feel supported, valued, and socially connected, providing many other health and well-being benefits.



The key outcome will be:

Older people will feel less isolated and alone and have opportunities to be socially connected within their community.



Our goals over the next three years to achieve this are:

To provide a Befriending Service to older people who are isolated, housebound or living with poor mental health across East Lindsey, West Lindsey and North Lincolnshire, with a particular focus along the East Coast.

To develop Friendship Groups/Coffee Clubs along the East Lindsey coastal area to encourage social interaction and new friendships.

To deliver Friendship Groups/Coffee Clubs within targeted care homes across East Lindsey, West Lindsey and North Lincolnshire, providing a creative and active community life for residents.

To encourage and promote older peoples use of digital services and information technology that positively supports them to access local activities, support and services and provides digital skills support in the most 'digitally deprived' areas of our local communities.

To deliver a three-year programme of targeted outreach sessions providing support and charity services in the most socially isolated areas through the Keep Connected InfoBus.



We will know we have succeeded when:

We have supported older people to feel less socially isolated and lonely through receiving a befriending visit, telephone call or having 'virtual' interaction with others over the life of the Strategic Plan and by September 2025 developed a way to benchmark how older people's confidence levels improve because of their engagement with our Befriending Service.

We have new Friendship Groups/Coffee Clubs in operation in coastal areas by March 2024.

We have Friendship Groups/Coffee Clubs operating in targeted care homes by May 2025.

We will have feedback from 75% of older people using digital services, saying they feel more confident online following support across the life of this plan.

We have a programme of targeted mobile outreach sessions in place across East Lindsey West Lindsey and North Lincolnshire, between April and September in each year of this Strategic Plan.



Resilient in Challenging Times



Over the next three years our aim is:

To develop a range of interventions and services that can help older people to develop their resilience in challenging times.



Our reason for this is:

Older people have told us that later life can bring specific challenges such as poor finance and poverty, bereavement, ill-health such as dementia, career transitions and retirement or the break-up of a close relationship, making it harder for them to 'stay strong' and cope with their situation.



The key outcome will be:

Older people will feel supported to cope with changes and challenges in their lives and be helped to exercise control and choice when making informed decisions.



Our goals over the next three years to achieve this are:

To provide accessible and quality assured information, signposting and advice to older people on topics such as money & benefits, legal matters, costs of care and other issues important to them.

To work in partnership with key agencies such as Lincolnshire Police, Humberside Police, Trading Standards, Citizens Advice and Action Fraud to offer help to those affected by scams and fraud and provide practical support as needed.

To continue to promote the Age UK Lindsey's Gertrude Penny Fund, enabling it to be used to provide better support to those most vulnerable older people affected by poverty, including fuel and food.

To identify and develop a range of support for older people suffering from dementia through our 'dementia champions team' who will offer support to those with dementia and provide information about local support services.

To provide a person-centred approach and assessment of the needs of older people at their first point of contact with the charity through our Single Point of Contact, Thrive Team.



We will know we have succeeded when:

We have secured at least one million pounds of previously unclaimed benefits per year and of those clients supported 80% are 'very satisfied' with service received over the three years of this Strategic Plan.

We have directly helped vulnerable older people at risk of scams and fraud in our area through provision of one to one support, group awareness sessions and targeted events and outreach sessions over the life of this plan.

We have supported the most vulnerable older people by providing direct help through the allocation of hardship monies from the Gertrude Penny Fund over the next three years.

We will have 'scoped' a plan and new approach for supporting those suffering with Dementia and identified a range of interventions we can offer by April 2024.

We will have provided information and signposting for a minimum of 6000 individual clients over the three years of this plan, through our Single Point of Access (Thrive Team), with the team also achieving the new Quality of Information and Signposting Standard by April 2024.



Influencing and Campaigning



Over the next three years our aim is:

To work closely with older people to ensure they can influence and campaign on issues that can help change the narrative around ageing and older adults.



Our reason for this is:

Older people tell us that they benefit from participating and being involved by feeling that they are 'making a difference', feeling useful, gaining confidence and skills, and 'having a say' on issues that they care about.



The key outcome will be:

Older people will be more engaged in their local communities and will have increased their confidence to identify issues of importance to them both locally and wider spread.



Our goals over the next three years to achieve this are:

To focus our campaigning on where we believe we can achieve the greatest impact with decision makers on local and national issues, such as funding for health, care and support systems, cold homes and loneliness.

To identify ways to ensure older peoples voices are heard through the formation of an Older Peoples Forum in East Lindsey, West Lindsey and North Lincolnshire.

To extend the ways by which we gather feedback from older people about our services and activities and encourage better engagement with our charity.

To review the charity membership scheme to ensure it is still fit for purpose and makes sure the charity is accountable to a wider body of stakeholders.

To raise the issues surrounding loneliness and isolation in Lindsey and North Lincolnshire through the commission of a video through Lincoln University, which can support social media campaigns.



We will know we have succeeded when:

We have identified and actively promoted two key campaign issues per year over the next three years that are relevant to older people.

We have established three Age UK Lindsey Older Peoples forums in key identified locations by April 2025.

We have expanded the Customer Service feedback form into shops and services by the end of 2023.

We have introduced a new membership scheme by January 2024, which enables our supporters make an invaluable contribution to the life of our charity.

We have produced an intergenerational partnership video about loneliness and isolation in our area by December 2025, that can be used to support social media campaigns.

Key Areas of Development

During the next three years Age UK Lindsey will look to focus on five Key Areas for development, improvement and innovation, which will ensure the successful execution of our strategy.

These five areas are:



Volunteering



Developing Digital Maturity



Excellent Fundraising



People and Organisational Development



Financial Stability and Efficiency



Volunteering



Over the next three years our aim is:

To ensure volunteering is at the heart of everything we do by providing access to volunteering opportunities, enhancing the volunteers experience and recognising the volunteer’s contribution to Age UK Lindsey and to older people in our area.



Our reason for this is:

Volunteers are key to our workforce and volunteering can bring measurable benefits to the volunteer, individual beneficiaries, groups and organisations, communities, the environment and society at large. Volunteering helps sustain our charity and we depend on harnessing the enthusiasm, creativity, skills and abilities of our local volunteers.



The key outcome will be:

Volunteers will feel valued and supported and feel a sense of achievement through volunteering, which in turn will support the capacity and structure of our charity.



Our goals over the next three years to achieve this are:

- To establish a reputation for excellence in volunteering and establish ways in which we recognise and value the key contribution volunteers make to our charity.
- To have a clear Volunteering Plan in place that demonstrates our commitment to volunteering and gives clarity about the recruitment, management and support of all volunteers working for Age UK Lindsey.
- To identify a team of volunteers who can support and make a difference to people living with poor mental health or behaviours associated with distress and/or impaired functions and their carers.



We will know we have succeeded when:

- We have developed a quality approach to volunteering by achieving the ‘Investing in Volunteers’ accreditation by December 2026.
- We have formally recognised the value of volunteers, through the delivery of an Annual Celebration event taking place each year for the next three years.
- We have in place a Volunteering Plan by January 2024 that underpins Age UK Lindsey’s approach to volunteering and integrates with our Strategic Plan.
- We have actively recruited a team of volunteers by March 2024, who will be able to support our approach to poor mental health or behaviours associated with distress and/or impaired functions and their carers.



Developing Digital Maturity



Over the next three years our aim is:

To develop the use of digital technology across the charity, improving services and communication and providing cost savings through increased operational efficiency.



Our reason for this is:

By embedding a digital approach across our charity, we will be better able to deliver our strategic priorities, create value, give our clients a better experience, streamline service delivery, develop a competitive advantage in fundraising and engage better with clients and stakeholders.



The key outcome will be:

We will increase our ability to fundraise, enhance our marketing and communications approach and be better equipped to support day-to-day operations, with staff and volunteers better able to adapt and respond to the needs of our clients.



Our goals over the next three years to achieve this are:

To migrate from having a physical server to storing charity information and data on the 'Cloud'.

To identify digital champions across the charity to promote, support and drive our approach to digital transformation ensuring our workforce and volunteers develop the digital skills and confidence required.

To achieve increased fundraising revenue and improve ways to engage with clients by embracing new technology and digital transformation.



We will know we have succeeded when:

We have moved from having a physical server to a 'virtual' server by January 2024.

We have identified charity 'Digital Champions' by December 2023 to offer support across the charity.

We have carried a review of all charity IT equipment and resources by December 2024 and prioritised a programme of replacement and upgrade.



Excellent Fundraising



Over the next three years our aim is:

To establish an approach to Excellent Fundraising that will inspire people to give money to our charity and improve our income generation over the next three years.



Our reason for this is:

We need to build a secure financial future by developing a wide range of innovative strategies for generating income and fundraising, in order to sustain the charity over the next three years and beyond.



The key outcome will be:

We will have developed sustainable and respectful relationships with individual and business supporters to ensure they are better engaged in fundraising for our charity and supporting income growth.



Our goals over the next three years to achieve this are:

To develop a programme of fundraising activities that increases our unrestricted income.

To develop a strong brand identity with effective communication, marketing and fundraising operations that is understood and embraced by all staff, volunteers, clients and donors.

To maximise the sales and profit potential of each of our charity shops and further develop the approach to online selling of charity goods.



We will know we have succeeded when:

We have in place a Fundraising Team by January 2024 made up of one paid member of staff and four volunteers, increasing annual fundraising revenue by 10% per year over the next three years.

We have developed a clear local brand identity by January 2025 making clear to clients and donors that we are a local charity.

We have developed a programme of income maximisation for all shops by January 2024, which will include targeted shop refurbishment, staff development and volunteer recruitment.

We have identified two new opportunities to increase the number of charity shops in targeted key locations by January 2025.

We have further developed our online sales and increased revenue by 20% by September 2024 from current baseline.



People and Organisational Development



Over the next three years our aim is:

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 values diversity and ensures people are effectively developed and motivated, with their contribution recognised and valued.



Our reason for this is:

Age UK Lindsey wants to create a charity where we deliver high quality customer based services, focused on the needs of our customers 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.



The key outcome will be:

Staff and volunteers working for the charity are appropriately skilled, developed, involved and engaged.



Our goals over the next three years to achieve this are:

To identify a clear Learning and Development Plan for all of our workforce (paid staff and volunteers).

To ensure our workforce has a forum where they can share their views about working for Age UK Lindsey and highlight their satisfaction and any areas for development.

To develop an Annual Staff Feedback (ASF) survey to focus on workforce support, development, health and wellbeing, and better engagement with the charity.

To offer development opportunities to support the Board of Trustees to meet good governance requirements as required by the Charity Commission and also by Age UK through the Charity Quality Standard (CQS).



We will know we have succeeded when:

We have developed a comprehensive Learning and Development Plan by December 2023.

All staff have up-to-date Personal Development Plans reviewed as part of the annual performance review and development cycle by April 2024.

We have developed an Age UK Lindsey Staff Forum by July 2024 with representation from all charity departments.

We have developed an Annual Staff Feedback (ASF) survey by May 2024, with feedback from staff showing 85% satisfaction in working for Age UK Lindsey.

We will have in place by January 2024, a Trustee induction and training programme, which identifies learning and development needs of all Trustees.



Financial Stability and Efficiency



Over the next three years our aim is:

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.



Our reason for this is:

Age UK Lindsey wants to start building towards a sustainable future where we operate within our means and can better react to changing circumstances.



The key outcome will be:

There will be enough finances to fulfil the mission of the charity and enable financial resilience.



Our goals over the next three years to achieve this are:

To remain financially viable and enhance our financial independence by focusing on generating increasing levels of unrestricted income each year.

To constantly review organisational and service efficiencies to ensure that costs are affordable and realistically based on the resources available.

To develop new sustainable and diverse sources of income, such as the new Handy Person Service.



We will know we have succeeded when:

We have increased the levels of unrestricted income for the charity from charity shops, our online shop and community fundraising by 10% from the current baseline for each year of this Strategic Plan.

We have introduced organisational and service level efficiencies and changes to the way we work each year of this plan, in order to better manage with our existing resources.

We have implemented a pilot of a new sources of income by September 2024 with a 'Handy Man' service being delivered in targeted areas such as Horncastle, Caistor and Barton upon Humber.

Plans which underpin the Strategic Plan

Sitting alongside this three year Strategic Plan will be a number of other plans, which give more detail about key areas of development across the charity. These are as follows:

Fundraising and Events Plan



Our **Fundraising and Events Plan** will be an integral part of our wider **Strategic Plan** and will set out our approach to fundraising and delivering events for the coming three years. This plan will reference relevant ethical standards and codes of conduct, identify clear and realistic goals and map a pathway for achieving more income into the charity.

Community Engagement Plan



Our **Community Engagement Plan** will ensure that we engage with our local communities and stakeholders as fully as possible and we will need a plan to ensure this happens appropriately. It will ensure that the community are informed about and/or invited to contribute, through consultation or involvement, to projects, service delivery or policy changes relating to our charity including; services, events, strategic planning, campaigns and projects.

Communications and Marketing Plan



Our **Communications and Marketing Plan** will support us to communicate effectively and meet our core organisational objectives. The key purpose will be to make people more aware of our brand and bring together our approach to the media, raising our profile, reducing negative impacts and increasing fundraising opportunities.

Learning and Development Plan



Our **Learning and Development Plan** shows our intent as a charity to support individual, team and organisational learning, so assisting us to meet our mission and goals and drive improvement, as well as offering support and guidance on a range of staff health and wellbeing initiatives.

Volunteering Plan



Our **Volunteering Plan** will enable us to raise the profile of volunteering in our charity and give clarity about the recruitment, management and support of all volunteers supporting Age UK Lindsey.

Service Delivery Plan



Our **Service Delivery Plans** will clearly outline how each service and department across the charity will deliver their area of the business in the most efficient and cost effective way whilst meeting the aims within the Strategic Plan. This will include a Dementia Support Delivery Plan and a Safe and Warm Homes Delivery Plan.

Evaluating and Sharing Success

In order to measure our social impact we have set out our goals and priorities within this Strategic Plan.

This Plan is reviewed at Board meetings, with robust targets set for our managers, which measure performance on both a financial and outcomes basis.



The objectives and priorities within our Strategic Plan are monitored at regular strategic meetings, where our Executive Team and Board of Trustees review both business and outcome performance ambitions and define how we will be successful as a local charity, in what is a challenging and changing time.



Alongside our last Strategic Plan, Age UK Lindsey developed reporting mechanisms which allowed key targets to be monitored and evaluated as we aimed to be accountable, transparent and give better performance.



We developed a reporting tool, which we used when reporting back to the Board of Trustees and we intend to develop this further over the next three years.



We gather evidence of need from collecting the views of our clients through feedback obtained from questionnaires, volunteers mapping the area, monitoring user feedback, examining current research and analysing and interpreting statistical information. This data is then reviewed and where necessary changes are made to our business model.



We now use the Sales Force client database to record interactions with clients, with each contact with a client being recorded. This allows the Service Managers to measure how objectives are being met, ensure quality, monitor performance and evaluate the work being delivered.



We measure client's satisfaction through our Impact Survey which is sent out to every client after we finish our interaction with them. Changes to services have occurred as a result of feedback received from this information.



We have exciting but realistic aspirations and want to develop our core services within a robust strategic and service planning process, which is mindful of the financial restraints we are working in.

Achievements against our 2019 - 2022 Strategic Plan Priorities

During the ‘Covid years’ we had to take decisions that were difficult. Our income and resources were hit hard and we had to accept that some of our aspirations would not come to completion.

Despite this, we are proud that our charity survived Covid-19 and that a number of key goals set within our last Strategic Plan were achieved.

- We signed up as a Friends Against Scams Organisation.
- We launched our new Mobile Outreach Project and promoted better access to digital opportunities including the provision of the tablet loan scheme.
- We continued to promote loneliness as a major issue older people face through our social media and service delivery.
- We worked in partnership with North Lincolnshire Citizens Advice Service and Public Health to deliver a support programme for those older people who have been bereaved and needed support.
- We continued to secure high levels of unclaimed benefits for older people across our area.
- We produced new guidelines for our Gertrude Penney Fund which provides aid to the most vulnerable older people.
- We introduced a new Client Database (Salesforce) allowing better management of client interactions across the charity.
- We appointed a Volunteer Coordinator to lead our volunteering approach across all areas of the charity.
- As part of our delivery of digital transformation we now send out a monthly digital newsletter to all staff and volunteers.
- Using Covid grant monies we upgraded our charity IT equipment and provided laptops for staff to be able to work from home along with other new IT resources.
- We introduced a new Single Point of Access Team (Thrive Team) for people contacting the charity.
- We have continued to promote key and relevant influencing campaigns such as reforming social care through our social media and website.

Our Tiered Approach

Age UK Lindsey will operate a tiered approach to the delivery of our services, which will be designed to ensure that we work productively with our clients and support their needs in the most appropriate way and within the resources that we have.

We have identified the three tiers of intervention to be offered by Age UK Lindsey as **Universal**, **Targeted** and **Intensive** and we have clearly identified which services will be offered at each stage of these three interventions.

The 4 key principles which underpin this approach are as follows



Better prevention and help

We will support older peoples care and wellbeing in our local communities by offering good quality information and advice and supporting older people in local communities to feel safe, less isolated and more resilient to problems when they arise.



Better cost effectiveness

We will ensure we deliver services more efficiently and cost effectively. This means we can ensure that every penny spent by the charity is used to maximise the health and wellbeing of our older population.



Better understanding of needs

We will ensure that we understand what matters to the people we work with. To help people to maintain as much independence as possible, we will help them to build on their strengths and abilities and provide an appropriate level of support.



Better service delivery

We will take a positive approach to service delivery and respond within the resources we have to older people's needs. We will ensure everyone is treated with respect, dignity and fairness.

We will work in partnership with other agencies to better integrate our services and ensure that services are efficient, avoid waste and are more effective in meeting all of a person's needs.



Tier 3 INTENSIVE

(Complex needs, higher risk)
Interventions to support high level or complex needs

TIER 3 – INTENSIVE

Complex support needs, reduced independence and high levels of support needed.

Intensive (Complex needs) interventions to support high level or complex need.

The role of Age UK Lindsey is to ensure we offer clients support within the resources we have when health and wellbeing issues threaten someone's independence.



INTERVENTIONS

Provided to identify and reduce risks as soon as possible and will focus on supporting people to retain or regain as much independence as possible.

We will expect these interventions to identify and support those people who might be at high risk of future health or wellbeing problems and ensure that they are engaged with and supported within the resources we have, or referred to services who can offer the support needed.



INTERVENTIONS MIGHT INCLUDE:

- Providing domestic support in the home to clients coming home from hospital.
- Befriending Home-visiting Service.
- Information and Advice Home-visiting Service.
- Referring to Health and Social Care services.



Tier 2 TARGETED

(Higher needs, moderate risk)
Interventions to support identified needs

TIER 2 – TARGETED

Higher needs, lower independence levels, more focused levels of support needed.

Targeted interventions designed to support identified needs of clients.

The role of Age UK Lindsey is to ensure that clients are able to have a good quality of life.



INTERVENTIONS

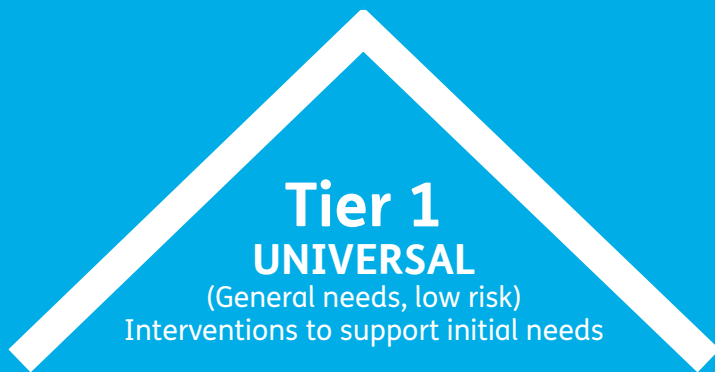
Provided to support clients to stay active, healthy, avoid loneliness and isolation, keep informed and remain connected to their local community.

We will expect these interventions to identify and support those people who might be at risk of future health or wellbeing problems and ensure that they are engaged with and supported within the resources we have.



INTERVENTIONS MIGHT INCLUDE:

- Providing domestic support in the home.
- Supporting clients into social group activity or community Friendship Groups.
- Supporting with scam prevention initiatives.
- Providing information and assistance to enable people to find the support they need.
- Providing volunteering opportunities that help people to stay active and involved.
- Campaigning on issues which older people find important.
- Providing Safe and Warm Homes support.



Tier 1 UNIVERSAL

(General needs, low risk)
Interventions to support initial needs

TIER 1 – UNIVERSAL

General needs, high levels of independence, minimal support needed.

Interventions designed to support the initial needs of clients.

The role of Age UK Lindsey is to ensure all clients aged 50 and above receive a service.



INTERVENTIONS

Provided to all our clients at the initial stage of their involvement with our charity.

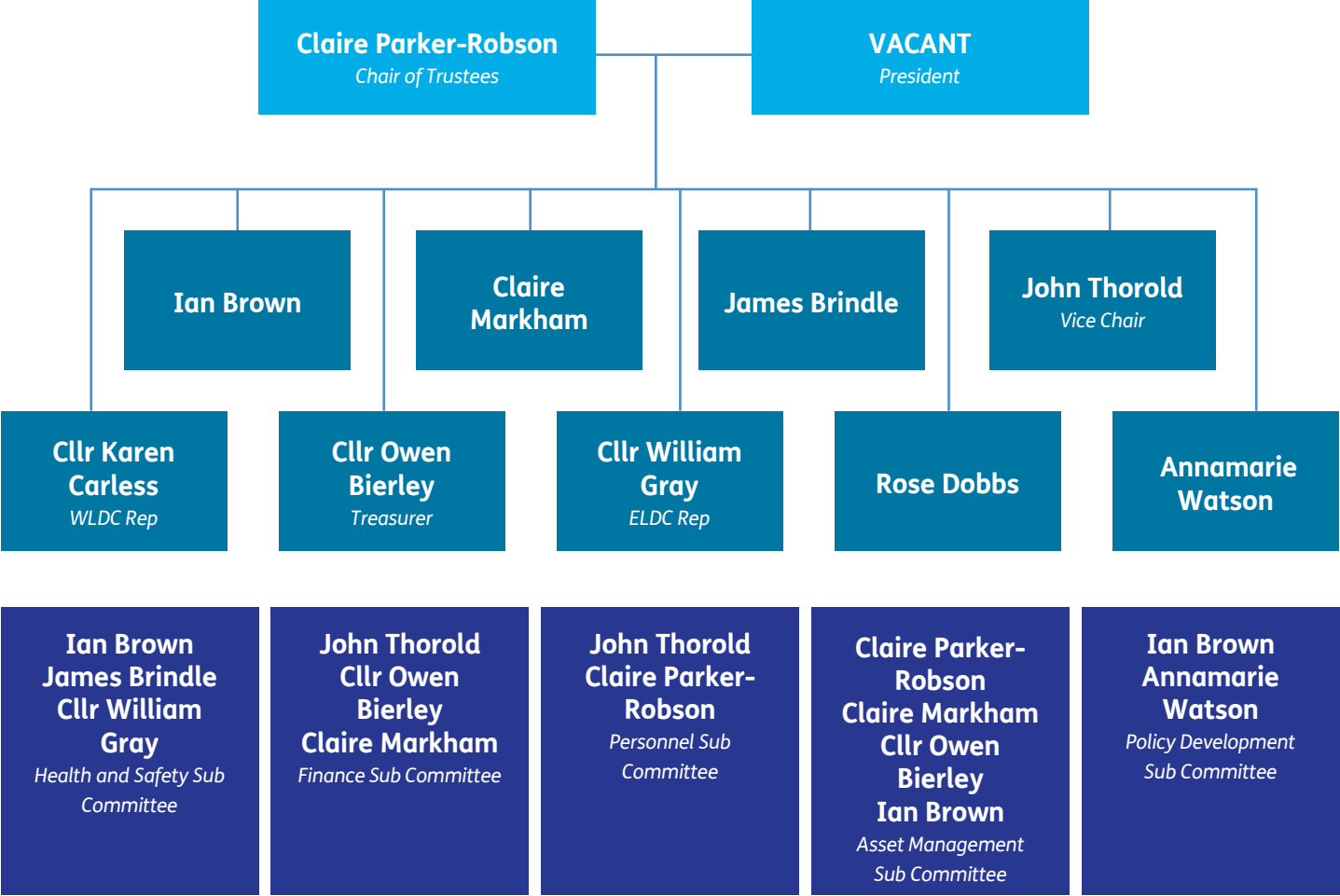
We will expect these interventions to ensure that all older people in Lindsey and North Lincolnshire communities, who might be at risk of future health or wellbeing problems, receive the services they need and ensure they engage with and are supported within the resources we have.



INTERVENTIONS MIGHT INCLUDE:

- Providing community information and fact sheets through the Thrive Team.
- Making appointments for home visits.
- Signposting to other organisations.
- Signposting to volunteering opportunities.

Trustees Structure Chart



As a registered charity we have a Board of Trustees who have the legal and financial responsibility for governing the charity and who make decisions on policy matters relating to Age UK Lindsey.

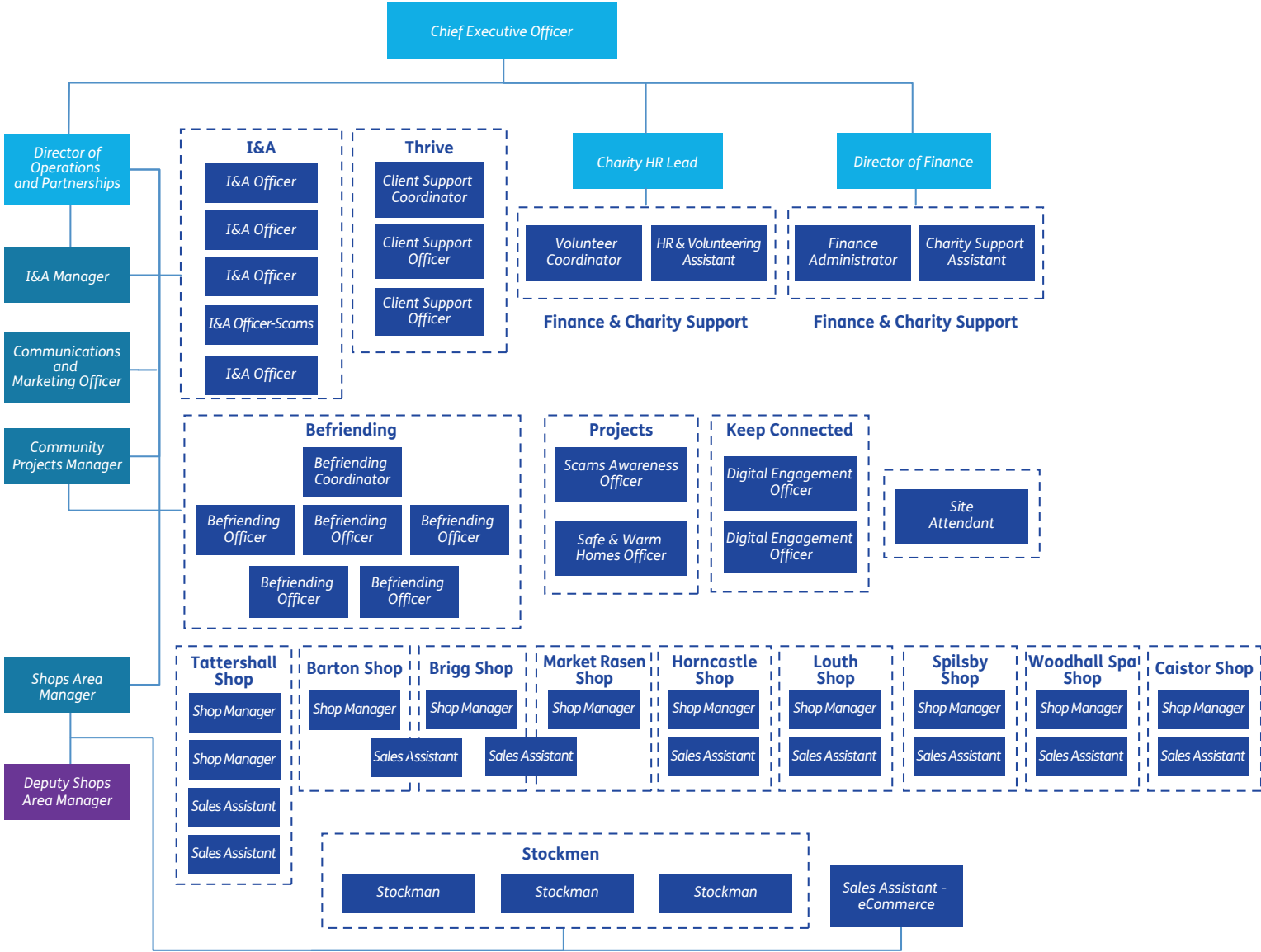
The sub-committees will make recommendations to the Board of Trustees for a final decision.

The Board of Trustees along with the Executive Management Team and nominated staff will meet as task specific sub-committees, to focus on a particular duty or area, such as finance or personnel.

The Board of Trustees delegate the task of managing the day to day strategic and operational direction of the charity to the Chief Executive Officer and Executive Management Team, who keep them updated on progress through reports given at bi-monthly Board meetings.

Correct as at October 2023

Staff Structure Chart



Correct as at October 2023

Making a difference in East Lindsey, West Lindsey & North Lincolnshire

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Main Funding Providers

Age UK National
Clothworkers Foundation
Henry Smith Charity
Humberside Police and Crime Commissioner
Nationwide Building Society
Nuclear Waste Services
Shine Lincolnshire
Tesco Community Grants
West Lindsey District Council
East Lindsey District Council
National Lottery

We would like to express our sincere thanks to the above funding providers and sponsors, along with everyone who supports Age UK Lindsey and the work we do.

Main Sponsors

Dexter & Sharpe Accountants
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(Correct as at October 2023)



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