



# Strategic Plan 2019 // 2022

Age UK Lindsey is an independent local charity, working to promote and improve the well-being of older people in East Lindsey, West Lindsey and North Lincolnshire.

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**“ My Home Support Assistant is a lovely lady, more like a best friend. I would miss her if she didn't come. My son cannot get here very often and I am visually impaired so she is my link with the outside world.**

# Executive Summary

Age UK Lindsey has been supporting local older people for nearly thirty years, by delivering a wide range of services in the home and community. Our new strategic plan comes at a crucial point within the history of the charity and is at the core of future development - reaffirming our mission and ambition.

Our previous three-year strategic plan (running from September 2016 to September 2019) served the charity well. However increased demand for services, a changing demographic and the adoption of a larger service delivery area, (following the Age UK North Lincolnshire merger in 2017), have necessitated a re-evaluation of need and resources. Some issues we seek to address are new, others are a re-emergence of perennial difficulties. Financial constraints, government policies, changes in health and social care and an increasingly older population have all helped to influence the strategy and enabled us to identify five key priorities and four areas of development for the charity.

The strategic plan offers some foresight of what

success in each of the key priority areas would mean to our beneficiaries. Our aim is to help older people to make the most of later life by supporting their well-being, facilitating independence and ensuring that they have a voice in their own community. All services and departments within Age UK Lindsey will take responsibility for developing service delivery plans to enable successful implementation of the new strategy.

Building upon our achievements from the previous strategic plan, including partnership working and placing older people at the core of our thinking, combined with innovation and a healthy and thoughtful approach to risk-taking, we hope to set out the broad vision for our charity, and continue to develop a successful organisation supporting older people throughout the community.

**Andrew Storer**  
CEO Age UK Lindsey

# Our Mission

## mission

To promote and improve the well-being of older people, helping to make later life a fulfilling and enjoyable experience by addressing the issues of poverty, isolation and loneliness.

## 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

Delivering Digital Transformation

Income Generation and Fundraising

People and Organisational Development

## social objectives

**To support older people to live independently and safely in their own homes 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 well-being by supporting older people to be socially active and connected.**

**To develop a range of interventions and services that can help older people to cope with challenging times.**

**To work closely with older people to ensure that they can participate and be involved in their local community and influence the future direction of our charity.**

## A Word From The Board

We are delighted to present to you Age UK Lindsey's new strategic plan, setting out our priorities and direction for the next three years.

We are very pleased with the progress that our charity has made during the scope of the last strategic plan. It was a period of considerable change and during that time we reviewed every aspect of the organisation, including services and infrastructure, to ensure that we met the needs of older people in our community. We are pleased to report that our reach increased, we recruited a record number of volunteers and investment was made into IT to support staff in service delivery.

Moving forward, the Board of Trustees is confident that the charity is 'on the right track', and we are looking forward to a period of consolidation and steady growth. We know that this will not be an easy journey; we are seeing clients come to us with increasingly complex needs, and pressures on the charity sector are huge so this will mean rising competition for fewer resources.

However, this is a very exciting time for Age UK Lindsey. We are committed to forging meaningful partnerships both locally and within the Age UK network, and the Board recognises the dedication of our staff and volunteers. We would like to thank them for their ongoing hard work and we're looking forward to seeing just how much we can achieve over the next three years.

We hope that everyone is ready for the challenge!

### **The Board of Trustees**

Age UK Lindsey

## About Age UK Lindsey

Age UK Lindsey is a **local, independent charity** based in Horncastle, Lincolnshire, providing vital services to older people across the council districts of East Lindsey, West Lindsey and North Lincolnshire; an area twice the size of Greater London.

Having been **established in 1991**, the charity has evolved over many years. Initially based in St. George's Hospital in Lincoln and trading as Age Concern Lindsey, we moved to our current premises in 1996 and became a brand partner of the newly established Age UK national charity in April 2010. Following a successful merger in 2017, our charity took on the area previously served by Age UK North Lincolnshire.

Throughout our history, we have developed a deep understanding of the issues and challenges faced by older people. Our services have evolved to address these demands and we are dedicated to supporting all older people to overcome the difficulties that they may be facing.

Delivery of our services is underpinned by income

from our local **charity shops**. However, as an independent charity, we also rely on local fundraising and grant funding for a significant part of our income, especially in increasingly financially challenging times.

**Moving forward**, we are proactively working towards some exciting new projects to meet the challenges ahead and ensure that we continue to provide the quality services that our beneficiaries require and deserve.

We are looking to adopt a **tiered approach** to the delivery of our services, which will be designed to ensure that we work co-productively with our clients, supporting their needs in the most appropriate way and within the resources available.

We have established the three tiers of intervention as Universal, Targeted and Intensive, and have clearly identified which services will be offered at each stage. The four principles underpinning this approach are to achieve:

**Better prevention and help** to support older people's care, well-being, resilience and independence.

**Better understanding of needs** to ensure that we understand what matters most to the people we work with.

**Better cost effectiveness** ensuring that every penny spent by the charity is used to maximise our effectiveness upon the older population.

**Better service delivery** ensuring that everyone is treated with respect, dignity and fairness.

Through research, data gathering and client feedback, we have carried out **PESTLE** and **SWOT** analyses to help us in the development of the charity; ensuring that we remain aware of the opportunities and challenges that we may face over the lifespan of the strategic plan.

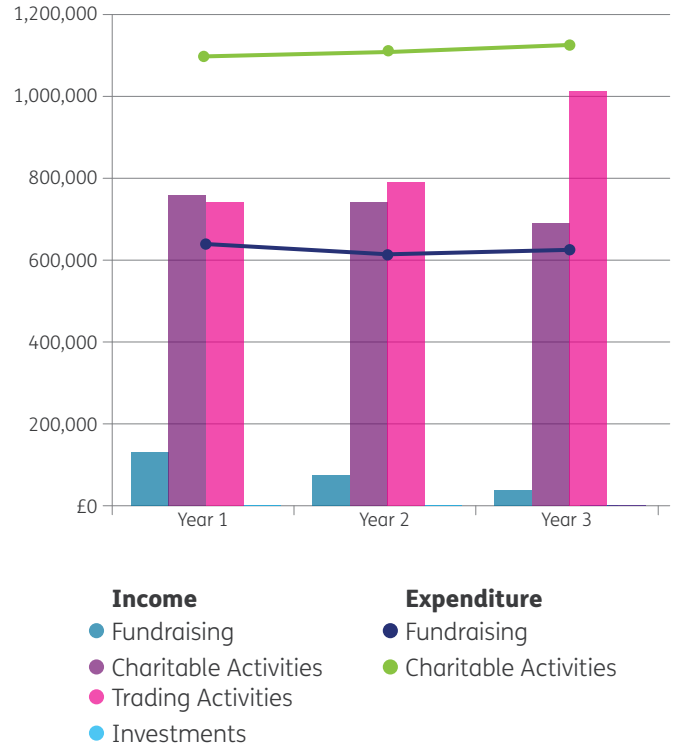
We have identified five **key strategic priorities** that we will focus on over the next three years. They are ambitious but will help to define how we will be successful and responsive to the needs of an ageing population. Underpinning the priorities are six **detailed delivery plans** and four **enablers**, or areas of development. All of which will support our four **key projects**: South Street, Digital Support, Single Point of Access and the Gateway to Friendship.

# Financial Projection

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 proactively source income from fundraising, grants, legacies, paid-for services, charitable activities (such as lunch clubs, transport and wheelchair hire) and our shops.





# Age UK Lindsey's Focus

Working with key partners in North Lincolnshire, we will help older people to gain access to vital services and remain independent for longer through our Transport Service.

## TRANSPORT

We will continue to provide a quality paid-for service to our clients through cleaning, gardening, handy help and mobility aids, ensuring older people remain living independently for longer. We will look to develop our new foot care service and build upon our success in offering free domestic support to palliative patients. Customer satisfaction will remain high through our commitment to ensuring that all workers are DBS checked, insured and regularly supervised.

## INDEPENDENCE AT HOME

The provision of a Befriending Service will remain a key charitable priority for Age UK Lindsey, providing companionship for lonely and socially isolated older people. We hope to build upon our success in East Lindsey and will look to secure further funding to enable us to expand the provision of one-to-one support and friendship groups into West Lindsey and North Lincolnshire.

## BEFRIENDING

We will provide activities to enable social inclusion, e.g. lunch clubs and coffee mornings - working in partnership where appropriate. We will also provide opportunities for our supporters, members and the local community to celebrate the work that we do, and to find out more about our services through our commitment to hosting six key events throughout the year.

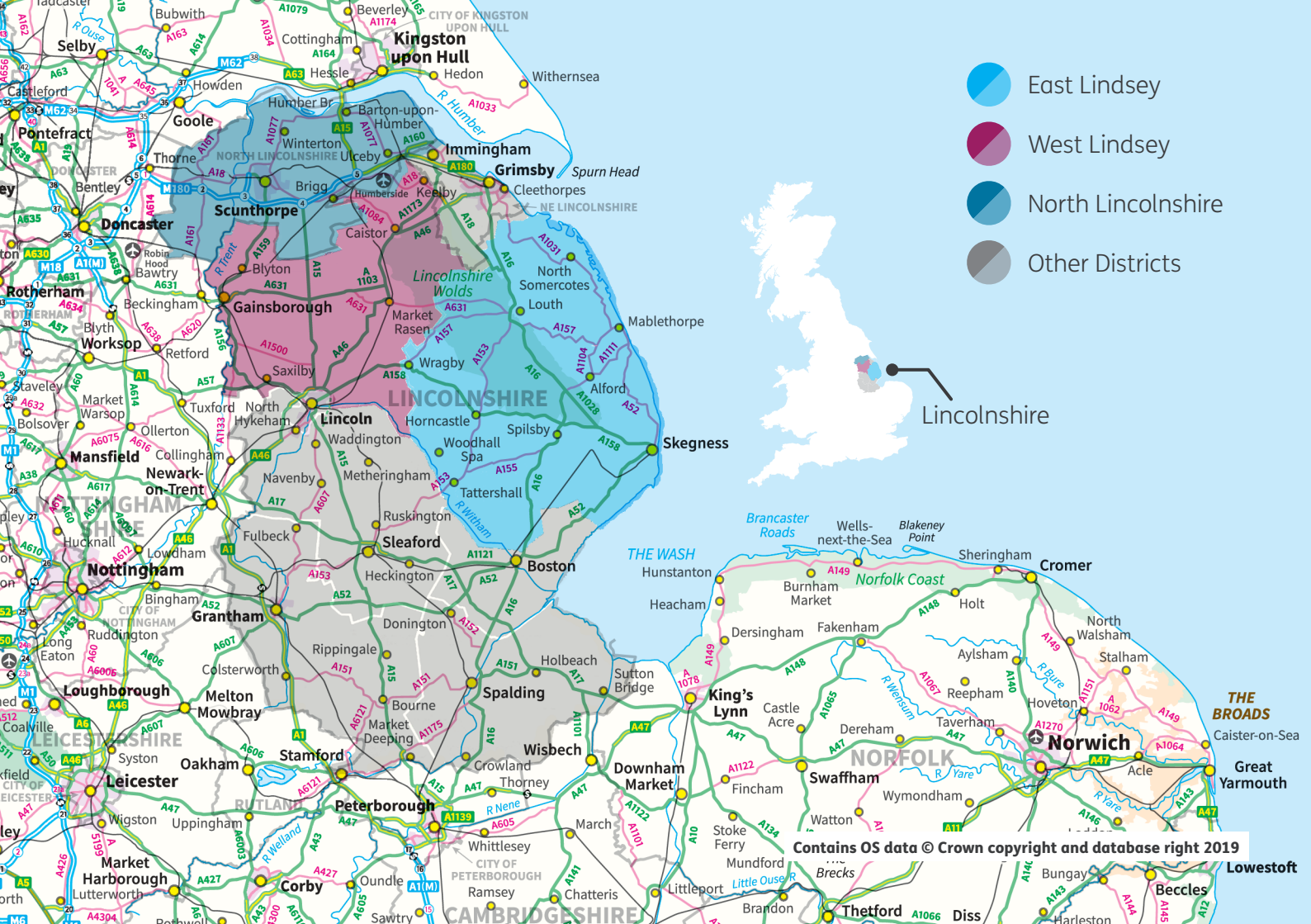
## COMMUNITY ACTIVITIES AND EVENTS

Building upon our current success in securing more than £1 million per quarter of unclaimed benefits, we will ensure that we continue to provide a free, comprehensive and beneficial I&A Service to our clients, through our Access Centre, community drop-ins, home visits and telephone support.

## INFORMATION AND ADVICE

## SHOPS

Our shops will remain integral to our charity and local communities by providing income to support our services, enabling employment and volunteering opportunities and being a portal for the delivery of information about our mission, our campaigns and our fundraising activities.

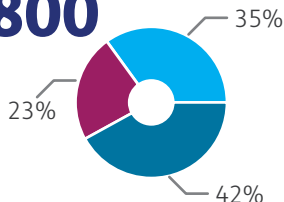


- East Lindsey
- West Lindsey
- North Lincolnshire
- Other Districts

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TOTAL POPULATION  
OF OUR AREA OF BENEFIT

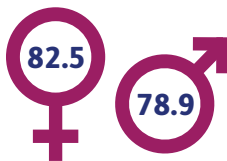
**404,800**



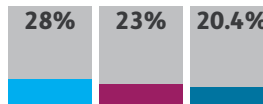
**4.2%** Average percentage of over 65s across our area of benefit from BAME (black and minority ethnic) groups compared to the national average of 6%.

The number of people developing late-onset dementia is increasing at a faster rate than the national average. It is estimated that the current number of people living with dementia in each of our three areas is an average of 7.9% of the population of over 65s.

The proportion of older people claiming pension credits in Gainsborough, Mablethorpe and Skegness is significantly higher than the national average.



Average life expectancy across our region is slightly lower than the national average



Percentage of population in each district aged 65 or over, compared to the national average of 18% and the Lincolnshire average of 9%



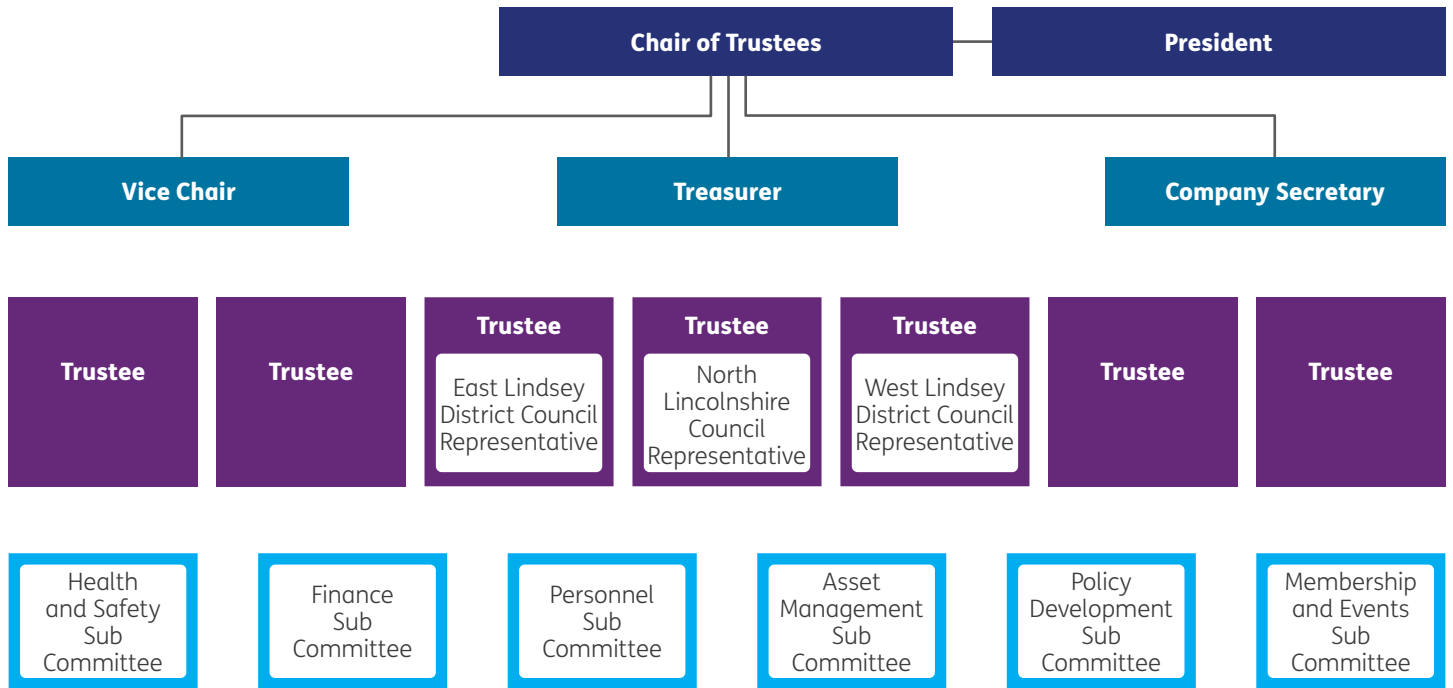
The number of **over 85s** living in rural areas in the UK is projected to rise by **186%** by 2028.

TOTAL AREA OF BENEFIT  
**3766km<sup>2</sup>**  
TWICE THE SIZE OF  
**GREATER LONDON**

In Lincolnshire the Index of Multiple Deprivation suggests that the lives of 17% of the pensioner population may be affected by lack of income, with Gainsborough, Mablethorpe, Skegness and parts of Scunthorpe being worse affected.

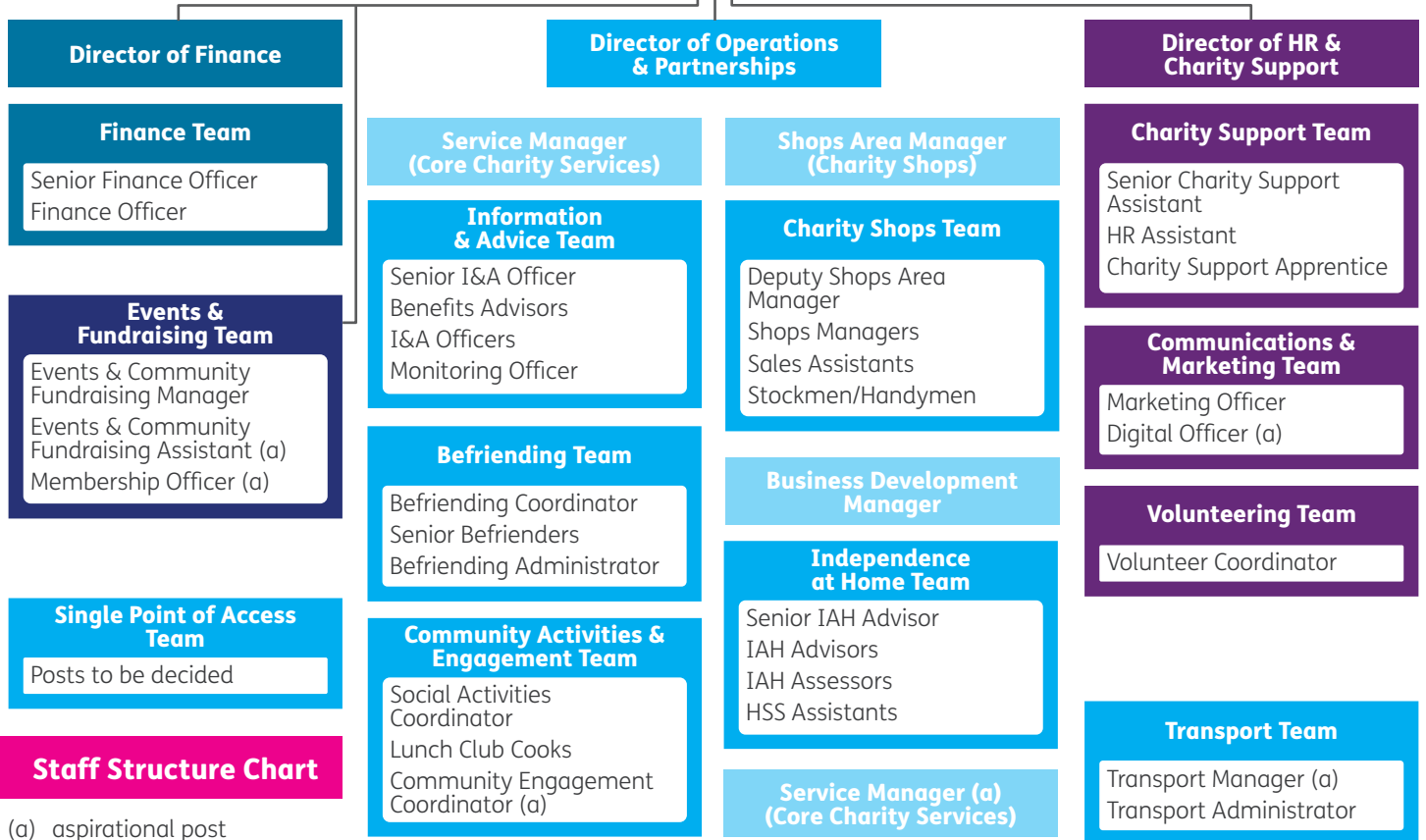
North Lincolnshire has a higher than average number of unscheduled hospital admission rates for older people with acute and chronic health conditions.

Statistics sourced from: Quality of Health & Wellbeing Strategy 2018; Lincolnshire Observatory; East Lindsey, West Lindsey and North Lincolnshire District Councils; 2011 Census



**Trustees Structure Chart**

# Chief Executive Officer



## Staff Structure Chart

(a) aspirational post

## Evaluating Success and Measuring Achievement

The goals and priorities set out in our strategic plan are reviewed regularly in order to ensure that we as a charity are achieving our key objectives.

Evidence of need and impact are measured through the recording and analysis of client interaction and feedback, and the use of impact surveys and database reporting; allowing managers to measure performance, ensure quality and evaluate the services being delivered.

We continue to develop our reporting mechanisms, enabling us to monitor and evaluate our performance and ensure that we remain accountable and transparent in our delivery.

Information is regularly presented to and assessed by the Board of Trustees and the Executive and Management Teams to enable continued and meaningful measurement of business and outcome performance, making changes where necessary to ensure that budgets are maintained and that we remain on-target to meet our strategic goals.

Where services are commissioned by external

partners, performance is evaluated through regular reporting to ensure continued financial support.

As a charity we have exciting but realistic aspirations and want to develop our core services within a robust strategic planning process whilst remaining mindful of the financial restraints that we are working under.

Our previous strategic plan outlined a number of key goals and desired outcomes, many of which have been achieved or surpassed. Those that we are yet to achieve (but are still appropriate to our direction of development) have been carried forward to the new plan.

✓ **Funding from TED in East Lindsey has resulted in the recruitment of a Befriending Coordinator and two Senior Befrienders.**

✓ **We are now a partner organisation with the Age UK Call in Time Service.**

✓ **We have over 70 clients receiving more than 250 hours of befriending support per month.**

✓ **We now have more than 60 volunteer Befrienders.**

✓ **We have created a database of community activities and are using this to refer people to clubs in their local area .**

✓ **We have developed four drop-in advice sessions across East and West Lindsey.**

## **In our last strategic plan, we committed to:**

- expanding our Befriending Team across the Lindsey area by employing a Befriending Coordinator and 3 Senior Befrienders; integrating with the Age UK Call in Time Telephone Service; increasing the number of volunteers supporting the Befriending scheme by an 20 extra volunteers per year and increasing the number of clients accessing the service.
- identifying and mapping locations in the Lindsey area that have community activities and use this information to support isolated older people.
- developing and expanding the Information and Advice Service through the increase of outreach sessions in identified community locations, using a hub and spoke method of delivery.
- expanding the number of lunch clubs to provide a focus for older people to meet and enjoy a nutritional lunch, whilst engaging in activities.
- launching a staff intranet to improve internal communications, increase efficiency and enable better resource management.
- increasing the number of volunteers; recognising and celebrating their contribution and creating a database to enable us to monitor and report on the added values our volunteers bring.
- developing our charity shops from 7 to 10 in key Lindsey locations.

✓ **We have developed 4 lunch clubs, operating in Horncastle, Skegness, Woodhall Spa & Fiskerton.**

✓ **Our new intranet (Elli) has been designed and built and is being regularly used by staff.**

✓ **We have created a bespoke volunteer database and recruited a Volunteer Coordinator.**

✓ **The achievements of our staff and volunteers are now recognised at an annual awards event.**

✓ **We have over 200 volunteers providing more than 19,000 hours of support per year.**

✓ **We have 10 shops in operation across our three areas.**

# SWOT Analysis

## STRENGTHS

We have committed and professional staff, recruited from the local area.

We have over 200 volunteers working more than 19,000 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 and other trading such as insurance.

We are clear about the issues facing our clients and deliver 'needs-led' services.

We have a positive and very well-known local reputation.

We are a brand partner of one of the best known charities in the UK.

We all want the best for our clients.

## WEAKNESSES

We need to improve the publicity and promotion of our charity as a local, independent organisation.

We need to reduce the number of buildings we are leasing for back office support and delivery of services.

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 to ensure our employees are well trained and developed in order to meet the growing needs of our clients.

We need more income to continue delivering services at current levels.



## OPPORTUNITIES

We want to develop our approach to digital technology, particularly with fundraising.

We want to positively develop our staff and volunteers and become an 'employer of choice'.

We want to develop partnerships with other service providers.

We want to expand our social enterprise initiatives and income generation.

We want to increase our range of services and activities, review how services are delivered and focus resources on the most viable areas.

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.

## THREATS

We need to be aware of the political, social and economic changes affecting our 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 and increase our reserves.

We need to be aware of the adverse publicity surrounding charitable trading and fundraising.

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 office functions and service delivery.

# PESTLE Analysis

## POLITICAL considerations

Unstable political environment  
Increased focus on the short term  
Uncertainties surrounding Brexit  
Changes in social care policies and funding for the NHS  
Increased public scrutiny over ethics, fundraising and charitable purpose  
Austerity measures imposed upon local government resulting in reduced funding

## ECONOMIC considerations

Economic uncertainty and a reduction in disposable income resulting in a decrease in charitable donations  
Increase in demand for services  
Shortfall in funding for the NHS  
The Government's focus on deficit reduction and driving growth  
Continued pressure on public finances

## SOCIAL considerations

Increase in ageing population requiring more health and social care  
Rising automation resulting in increased isolation  
Change in expectations regarding support and an increase in the complexity of care needs  
Increase in care home fees and demand for places  
Decline in the working-age population  
High turnover rate and reduction in staff working in care

## TECHNOLOGICAL opportunities

Implementing good communication to ensure information is freely available and in the right format

Continued investment in new software and hardware, working with Age UK to develop a new CRM system

Developing a digital roadmap to show aspiration and direction of travel

Continued development of our website and social media to support digital fundraising

Making use of new digital tools available from the DWP

## LEGAL considerations

Whether the Government intends to repeal EU regulations and replace them with UK-drafted alternatives post Brexit, particularly:

- The Working Time Directive
- Procurement and competition laws
- Regulation of medicines and medical devices
- The European Human Rights Act
- Standards in medical education

## ENVIRONMENTAL opportunities

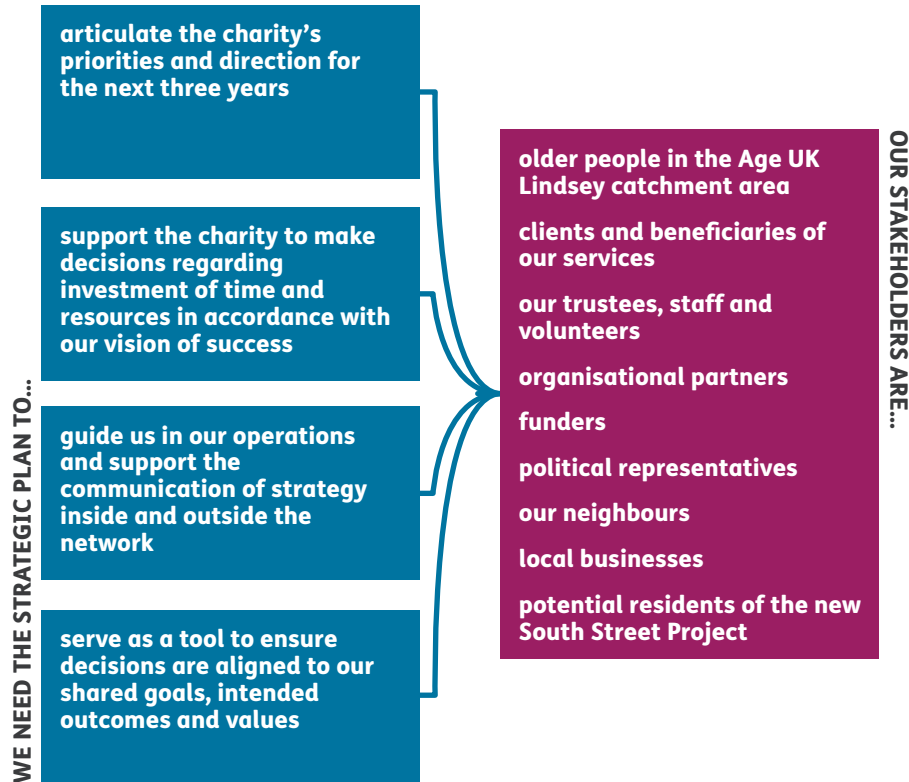
Supporting older people to reduce their carbon footprint and utility costs through our Winter Warmth projects

Ensuring that the South Street Project will be designed to be as environmentally friendly, cost effective and energy efficient as possible

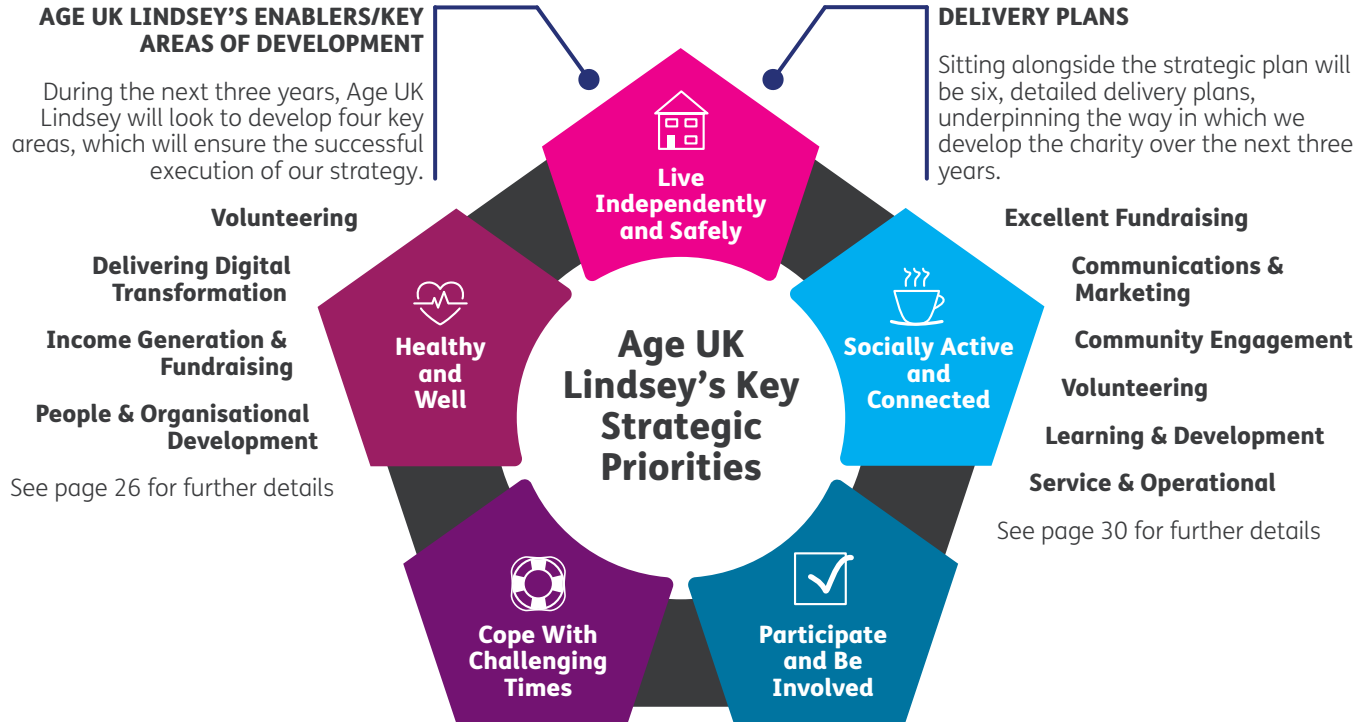
Promoting environmental awareness alongside greener attitudes and behaviour by gaining support from our clients and the wider community

# About The Strategic Plan

The process of creating our new strategic plan has been comprehensive, and is about much more than the final document. Through a series of meetings with trustees, staff, volunteers and clients, the Executive Team has developed a robust plan that clearly articulates and maps out the logic behind our aims, activities, outputs and the outcomes we wish to see for older people.



# Overview





# Live Independently and Safely

## What we want to do and why

**We want to support older people to live independently and safely in their own homes for as long as possible.**

**Older people tell us that living independently is important as they grow older, and most say that they want to remain in their own home, even when they need help to manage day-to-day tasks.**

## Our goals for the next three years are to:

- develop a new, purpose-built headquarters with integral housing for older people
- deliver support to older people in their own homes
- develop a Trusted Trader scheme
- deliver winter projects supporting older people to stay safe and warm
- provide a range of approaches for access to information
- develop links with local service partners and the voluntary sector to give a comprehensive approach to supporting independent living
- develop a proactive, prevention-focused approach to providing aids and adaptations

## We will know when we have succeeded when we have:

- completed the South Street Project and opened to the public
- increased our number of Independence at Home clients by 10% each year from the current base figure
- developed a new Trusted Trader scheme with local tradespeople
- supported 300 clients per year through our winter projects
- provided 300 clients per year with information and advice to support them to remain independent and safe
- signed up as a Friends Against Scams organisation
- provided a wider range of home aids and adaptations to more older people

## Our outcomes will be that older people are:

- supported with daily domestic tasks
- warmer at home
- more able to remain living independently
- more self confident
- safer in their own homes
- able to access housing designed to meet their needs
- less vulnerable to fraud and scams



# Healthy and Well

## What we want to do and why

**We want to support older people to be healthy and well in later life.**

**We know that promoting good health and well-being in later life benefits the whole of society by maintaining older people's social and economic contributions, minimising the cost of care to public services and improving quality of life.**

## Our goals for the next three years are to:

- provide opportunities for older people to take part in health and well-being activities
- provide accessible information on a range of health and well-being related topics
- focus our services to ensure those with the highest identified needs receive the highest level of support
- develop a foot care service that will operate in identified, accessible locations
- support older people to understand the benefits of volunteering, and enable opportunity
- further develop partnerships with local health and care organisations
- actively promote health and well-being campaigns being run locally and nationally

## We will know when we have succeeded when we have:

- enabled 40 older people to access physical or emotional well-being activities, and to grow this figure by at least 10% year-on-year
- provided 500 clients per year with information to help them remain healthy and well
- mapped the areas of greatest health inequality to ensure that we can deliver targeted interventions, making the best use of charity resources
- established six foot care clinics
- seen a 15% increase in the proportion of people aged 65 and over volunteering for us
- identified key strategic health partnership groups across our area and ensured that we have executive management representatives attending and engaging
- identified and established resources to promote a programme of two campaigns per year, highlighting the need to be healthy and well

## Our outcomes will be that older people are:

- telling us that they feel fitter and healthier
- participating in activities which promote a healthy lifestyle
- able to have better access to foot care services
- being supported to manage long term conditions
- staying healthy, active and independent for as long as possible



# Socially Active and Connected

## What we want to do and why

**Our aim is to reduce levels of loneliness and isolation and their negative impact on health and well-being, by supporting older people to be socially active and connected.**

**Older people tell us that being active and maintaining positive social connections is central to their health and well-being and fulfils a natural human need to feel supported and valued in society.**

## Our goals for the next three years are to:

- provide support to older people who are isolated, housebound or living with frailty
- focus on older people identified at greatest risk, to find out more about their interests, capabilities and needs, and develop a relationship with those people
- provide information about the range of activities and services available to older people
- encourage, promote and support the use of digital services and IT by older people
- campaign to raise awareness of issues surrounding loneliness and isolation in our area
- focus the Gateway to Friendship project on the areas with the highest levels of loneliness and isolation

## We will know when we have succeeded when we have:

supported 100 older people per month to feel less isolated and lonely through our Gateway to Friendship project

mapped the areas where older people experience the greatest levels of loneliness and received 20 referrals per month from other agencies to support those people

provided information to 500 older people per year about the range of local activities and services available to them

implemented a digital roadmap and promoted digital access to information and opportunities to 30 older people, and increased this number by 20% year-on-year

promoted the No One Should Have No One and Jo Cox loneliness campaigns every year

achieved the Quality in Befriending (QiB) award

## Our outcomes will be that older people are:

less isolated and lonely

socially connected and making a positive contribution within their communities

interacting on a regular basis with a network of friends and acquaintances

more self-confident and able to participate in community life

feeling valued

more confident in using technology



# Cope With Challenging Times

## What we want to do and why

**Our aim is to develop a range of services and interventions that can help older people to cope with challenging times.**

**Older people have told us that later life can bring specific challenges such as bereavement, ill-health, money worries, career transitions and retirement or the break up of a close relationship, making it harder to 'keep strong' and cope with their situation.**

## Our goals for the next three years are to:

- enable older people to access local advocacy services providing support and respect
- work in partnership with key agencies to offer support to those affected by an end-of-life diagnosis or bereavement
- deliver information and advice to older people on topics important to their needs such as benefit entitlement
- review our Gertrude Penney Fund, enabling it to be used to support those affected by poverty
- develop self-sustaining friendship groups supporting those affected by major life changes
- develop a network of volunteer dementia advisors, offering support and information

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## We will know when we have succeeded when we have:

enabled 20 older people every year to access advocacy support

supported 200 clients per year through our Independence at Home Palliative Care Partnership project

introduced a new service in North Lincolnshire that will identify and support 60 older people per year who have lost a partner through bereavement

secured £1 million per quarter of previously unclaimed benefits every year

reviewed our Gertrude Penney Fund and produced new guidelines to enable better assistance to older people with the greatest needs

six friendship groups operating across our area of benefit

recruited a team of 10 volunteers who have been trained to provide support and information to the friends and family of those with dementia

## Our outcomes will be that older people are:

feeling supported in coping with changes in their lives

able to make decisions through appropriate access to information and advice

able to plan for and manage major life changes

able to talk about dying and bereavement and plan for their last years of life

better able to understand their rights

# Participate and Be Involved

## What we want to do and why

**We want to work closely with older people to ensure that they can participate and be involved in all aspects of our charity and the wider community by influencing future direction and change.**

**Older people tell us that they benefit greatly from participation and being involved, by feeling that they are making a difference, gaining confidence and are useful to society.**

## Our goals for the next three years are to:

- develop ways in which clients and other stakeholders can influence the governance and strategic direction of Age UK Lindsey, including the South Street Project
- develop campaigns on behalf of older people which influence decision makers on local and national issues such as funding for health, care, loneliness and housing
- actively encourage town and parish councils to work with older people to address their needs
- establish an annual Age UK Lindsey Celebration Day
- review the provision, distribution and engagement with our charity services
- review and develop charity membership

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## We will know when we have succeeded when we have:

established Age UK Lindsey Older People's Forums in Horncastle, Gainsborough and Scunthorpe

identified and actively promoted two key, relevant campaign issues per year

contacted all town and parish councils, asking them to address key issues identified to us through our membership and Older People's Forums

established an Age UK Lindsey Celebration Day, combining it with our AGM and recognising the achievements of older people and our contribution to them

established a marketing strategy for the provision of service information

a group of local older people and stakeholders in place, responsible for the governance and management of the South Street Project

a new membership scheme in place, resulting in an active community of supporters

## Our outcomes will be that older people have:

a voice in the shaping of our services

their views shared with stakeholders and decision makers

better involvement in the community and an increase in their engagement

formal consultation and feedback mechanisms

**“ For me  
volunteering is  
a way of giving  
something back into  
the community. I  
wanted to give  
something back to a  
charity that really  
makes a difference  
to older people.**

# Volunteering

## What we want to do and why

**We want to ensure that volunteering is at the heart of everything we do by providing access to volunteering opportunities, enhancing the volunteers' experiences and recognise the contribution made by our volunteers.**

**In doing this we hope to bring measurable benefits to our volunteers and the wider community and help to sustain our charitable activities.**

## Our goals for the next three years are to:

- establish a reputation for excellence in volunteering by recognising and valuing the contribution our volunteers make to the charity
- ensure we provide clear and accessible information on volunteering opportunities
- give our volunteers the skills, knowledge, training and support they need to effectively do what we ask of them and review the structures supporting volunteering, ensuring effective recruitment, better communication, improved engagement and investment in development
- have a clear volunteering strategy in place that demonstrates our commitment to volunteering
- identify a team of volunteers to deliver age-friendly awareness sessions in schools

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## We will know when we have succeeded when we have:

formally recognised the value of volunteers through the delivery of an annual awards celebration and achieved the Investing in Volunteers accreditation

implemented a programme of ongoing evaluation resulting in 95% of volunteers stating that they feel valued, supported and informed

achieved a minimum 10% increase in both the number of volunteering opportunities and the number of volunteers recruited every year, and ensured that we have volunteers supporting all departments within the charity

a Learning and Development Plan in place, identifying a wide range of learning, training and volunteer progression opportunities

a volunteering strategy underpinning our approach to volunteering

recruited a team of 10 volunteers to deliver age-friendly awareness sessions in schools

## Our outcomes will be that our volunteers:

**will feel valued and supported**

**have gained the skills they need to fulfil their role**

**have gained confidence through volunteering**

**feel a sense of achievement**

**meet new people and make new friends**

# Delivering Digital Transformation

## What we want to do and why

**We want to develop a digital roadmap for increasing the use of digital technology across the charity.**

**This will enable us to be better equipped to deliver our mission and strategic priorities, create value, improve customer engagement, experience and communication, develop a competitive advantage in fundraising and provide cost savings through increased operational efficiency.**

## Our goals for the next three years are to:

- develop a clear Digital Transformation Plan and embed a digital approach for employees, key partners and clients, underpinned by communications and marketing strategies
- identify Digital Champions across the charity to promote, support and drive our transformation, ensuring the development of our workforce and volunteers
- embrace and embed digital transformation as an enabler of change, improved agility, increased engagement and better fundraising
- review the distribution of service information for older people and explore new ways of working that encourage better engagement with charity services
- invest time, money and resources into developing IT infrastructure, whilst training staff and volunteers to work more efficiently and effectively to take the charity forward

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## We will know when we have succeeded when we have:

produced both a Digital Transformation Plan and a Communications and Marketing Plan

identified eight Digital Champions to offer support across the charity

75% of staff completing digital skills training

increased the use of the charity's intranet to 75% of all staff who have access

developed a strong brand identity which is recognised and understood by clients, staff and stakeholders, and which better enables the targeting of information about the charity

carried out a review of all charity IT equipment and prioritised a programme of replacement and upgrade

moved to one CRM system, with staff and volunteers having better access to client information at appropriate levels

## Our outcomes will be that:

**staff and volunteers understand our digital roadmap and are trained and supported to use technology appropriately**

**staff and volunteers are better informed**

**older people are offered a variety of ways to access our information, including our website**

**older people feel supported in the use of digital technologies**

**client data is collected uniformly and is accessible to relevant staff**

# Income Generation and Fundraising

## What we want to do and why

**Our aim is to support the delivery of Age UK Lindsey's services through the development and implementation of a range of fundraising and income generating opportunities, complimentary to other sources of charity fundraising.**

**We want to do this to ensure a secure financial future during times of increasing economic pressure and constraint.**

## Our goals for the next three years are to:

- identify and develop new income-generating opportunities and trading activity, implementing a sustainable Income Generation and Fundraising Strategy
- maximise our income sources, including: gifts and legacies, corporate partnerships, sponsorship, social investment and individual giving, through the development of community fundraising activities
- develop an organisational culture and strong brand identity that is understood by everyone and which encourages staff, volunteers and trustees in fundraising
- maximise sales and profit potential in each of our shops, develop innovative ways of online selling and establish a clear pricing policy for our transport scheme
- ensure that all services consistently operate on a full-cost-recovery basis

## We will know when we have succeeded when we have:

developed new income sources through the South Street Project

produced an Excellent Fundraising Plan, established clear targets for all departments and developed a clear brand identity, emphasising that we are a local, independent charity

established a Community Fundraising Team made up of 1 paid member of staff and 4 volunteers, and increased annual fundraising revenue by 10% per year

developed a programme of income maximisation for shops, including refurbishment of premises, staff development, volunteer recruitment and online sales, and identified two new opportunities to increase the number of charity shops in our portfolio

reviewed our approach to income generation and commercial opportunity through the development of the South Street Project, service fees and charges, and transport fares

ensured that alternative (cost saving) models such as joint ventures are considered

## Our outcomes will be:

**more income and better services**

**better-looking shops attracting more customers**

**paid-for services reflecting the cost of delivery**

**staff and volunteers engaged in fundraising activities**

**brand recognition**

**a sustainable charity**

# People and Organisational Development

## What we want to do and why

**We want to develop a sustainable charity with a high achieving workforce, employed within an environment that is conducive to attracting and retaining the best people.**

**This will enable us to deliver high quality, customer-focused services within an organisation that values diversity, ensures development and recognition of staff contribution, and makes best use of resources from a structure that is fit for purpose.**

## We will know when we have succeeded when we have

developed an annual staff feedback survey resulting in an 85% satisfaction rating and achieved an 80% staff retention rate

developed a comprehensive Learning and Development Strategy and a system for reporting on the diversity of our staff and volunteers

identified an apprenticeship provider and have clear apprenticeship opportunities

introduced a flexible working policy and developed an Age UK Lindsey staff forum

introduced a new SPA (Single Point of Access) Team

an action plan to address the Governance Review Report, with clear trustee development

developed and introduced an annual quality health check of the charity, providing evidence towards the Age UK CQS assessment visit

## Our goals for the next three years are to:

promote the charity as an 'employer of choice', offering a positive work culture and environment that attracts and retains good staff and volunteers, ensuring that diversity is embedded in all strands of our charity, strengthening the culture of customer focus, placing our clients at the core of all we do

introduce formal work experience and apprenticeship opportunities

develop and introduce a clear, flexible working policy, making best use of resources and ensuring effective delivery of services, and review current work practices to identify improvements and manage and monitor quality across the charity

ensure that our workforce has a forum where they can share views and best practice

implement a programme of trustee development

## Our outcomes will be that:

**our staff have a voice and achieve a healthy work/life balance**

**our staff are trained and their skills and knowledge have been developed**

**our staff and volunteers are diverse and representative of the communities which we serve**

**trustees are supported to undertake their role**

**we have high retention and low turnover of staff**

# Delivery Plans

Our **Excellent Fundraising Plan** will be integral to the wider strategic plan and will set out our approach to fundraising, referencing relevant ethical standards and codes of conduct, identifying clear and realistic goals and mapping a pathway for achieving more income.

The **Community Engagement Plan** will ensure that we engage with our local communities and stakeholders as fully as possible. It will enable them to remain informed and engaged about projects, service delivery and policy changes.

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, raise our profile, reduce negative impact and increase our fundraising opportunities.

Age UK Lindsey's **Learning and Development Plan** shows our intent as a charity to support individual, team and organisational learning; assisting our charity to meet its mission and goals, whilst driving improvement and offering support and guidance to staff on a range of health and well-being initiatives.

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

The **Service Delivery Plans** will clearly outline how each service and department across the charity will deliver their area of the organisation in the most efficient and cost effective way, whilst meeting the aims of the strategic plan.



## Our Key Projects

### South Street

Age UK Lindsey is embarking upon an exciting new phase in the development of the charity and is proposing to build new, purpose designed headquarters, with scope for delivery of services and social activities. Integrated into the design will be twelve independent apartments, specifically designed for older people and addressing directly some of the issues that they face.

### Digital Support

Age UK Lindsey is currently operating with a basic level of digital maturity and is therefore proud to be working with Age UK and a number of local brand partners on a Digital Leadership project, supported by Dangoor and the Department for Culture, Media and Sport. This exciting project will strengthen AUKL's digital leadership, accelerate our digital ambitions and produce an agreed digital strategy for the charity to implement, including the introduction of a newly developed CRM system, ensuring that services will be better delivered, sustainable and scalable.

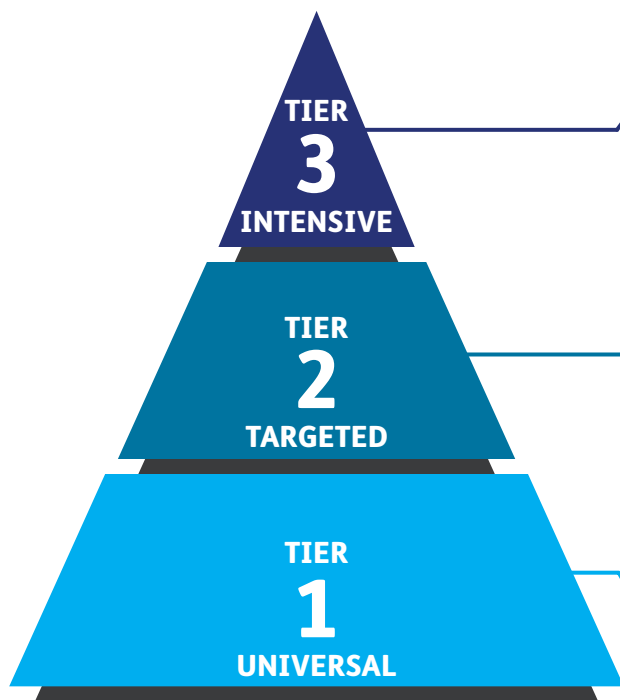
### Single Point of Access

Over the next three years, we aim to move to a 'single point of access' approach to managing client contact. All enquiries coming into the charity will come via one telephone number and one email address, enabling us to manage client interaction more effectively and efficiently, resulting in increased customer satisfaction and confidence in our service delivery.

### Gateway to Friendship

In certain key locations across our area, we will look to bring together befriending, our existing social activities, and our Transport Service to provide a joined-up approach to tackling loneliness and social isolation. We will call this project our Gateway To Friendship and we will look at developing and adopting a new and unique service model for befriending, working with partners to provide support to those who are most at risk.

# Using The Tiered Approach



how we allocate resources to deliver services

## Needs of client

Clients with **Tier 3 Intensive Needs** may require complex support, have reduced independence, and need high levels of support. Intensive interventions will be designed to support the needs of clients at higher risk.

Our role is to ensure that we offer clients support within the resources we have, when health and well-being issues threaten their independence.

Clients with **Tier 2 Targeted Needs** may have lower independence and higher needs, and will require more focused levels of support. Targeted interventions will be designed to support the identified needs of clients at moderate risk.

Our role is to ensure that clients are able to have a good quality of life.

Clients with **Tier 1 Universal Needs** will have high levels of independence, general needs and will require minimal support. Universal interventions will be designed to support the initial needs of all clients and those deemed to be at low risk.

Our role is to ensure that all clients aged fifty and above receive a service.

## Our interventions

**INTENSIVE INTERVENTIONS** are 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 help those who might be at high risk of future health or well-being problems and ensure that they are engaged with and supported by the resources we have, or referred to external services.

**TARGETED INTERVENTIONS** are provided to support clients to stay active and healthy, avoid loneliness and isolation and remain informed and 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 well-being problems, and ensure that they are engaged with and supported by the resources we have.

**UNIVERSAL INTERVENTIONS** are provided to all our clients at the initial stage of their involvement with the charity. We will expect these interventions to ensure that all older people in East Lindsey, West Lindsey and North Lincolnshire, who might be at risk of future health or well-being problems, will receive the quality services they need, and that they remain engaged with and supported by the resources we have.

## How we might deliver interventions

Providing domestic support in the home to those with a terminal diagnosis.

Befriending home-visiting service.

Information and Advice home-visiting service.

Referring to health and social care services.

Supporting through: scam-prevention initiatives; winter warmth; campaigning; access to social activities and groups and providing transport services where possible.

Providing information, advice and assistance to enable people to find the support they need and making available domestic support in the home.

Providing volunteering opportunities.

Providing trusted-trader information.

Providing information and support by telephone.

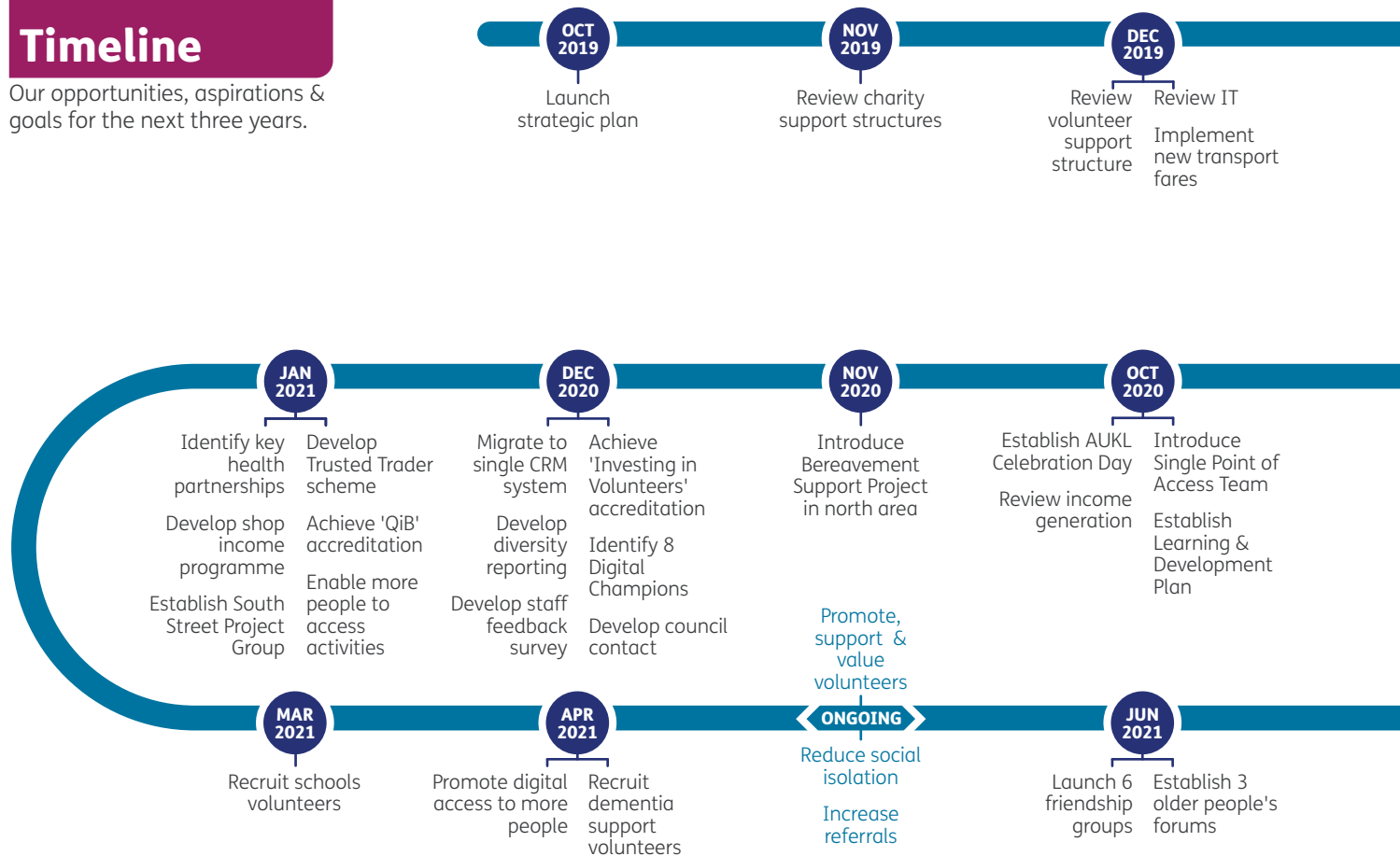
Providing information fact sheets on a range of topics.

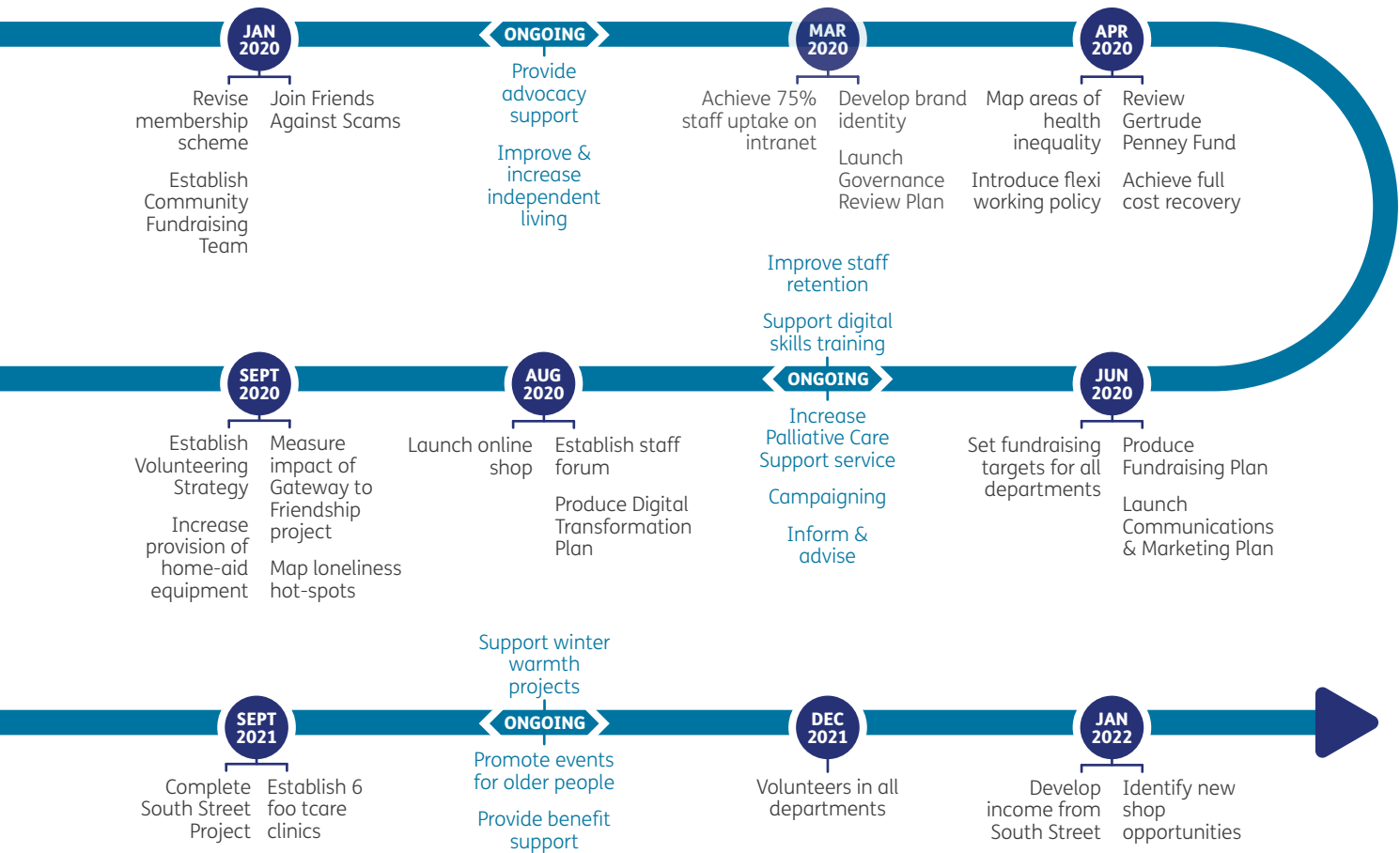
Signposting to other organisations.

Providing volunteering opportunities.

# Timeline

Our opportunities, aspirations & goals for the next three years.





# Jargon Buster

<b>advocacy</b>	An approach to offering independent support in making sure a person's wishes and views are represented without judging or giving personal opinion
<b>charitable purpose</b>	Something designed to benefit or relieve people mentally, morally or physically.
<b>CRM system</b>	A Customer Relationship Management system is a digital database designed to store and manage information electronically about clients and supporters.
<b>digital technology</b>	Any form of communication which can be transmitted over the internet or via computer networks. This can include text, audio, video and graphics.
<b>forum</b>	An opportunity or meeting in which people can talk about a problem or matter of interest or concern.
<b>full cost recovery</b>	Recovering all indirect and direct costs of providing a service through charging.
<b>mission statement</b>	Provides a clearly stated purpose for the charity explaining why we exist and who we serve.
<b>income generation</b>	A term used to describe an enterprise or business activity that makes money.
<b>older person/client</b>	Age UK Lindsey defines an older person as anyone aged fifty or above and that person will be defined as a client if they benefit from the services of Age UK Lindsey.
<b>person-centred approach</b>	This approach aims to see the older person as an individual, focusing on their unique qualities, abilities, interests, preferences and needs rather than by any issues or problems.
<b>PESTLE analysis</b>	A framework tool used to analyse and monitor the external factors (political, economic, social, technological, legal and environmental) that have an impact on an organisation.
<b>SWOT analysis</b>	A study undertaken by an organisation to identify its internal strengths and weaknesses, as well as its external opportunities and threats.



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