

Strategic Plan

2019—2022



Executive Summary

Age UK Merton is an independent charity operating within the national Age UK network to provide services for older adults in the London Borough of Merton. Our role is to ensure that older adults can easily access the advice, support and care they need as they get older.

Our Mission is to make Merton a great place to grow old

Our comprehensive services help over 3,000 individuals each year and are carefully tailored to meet the varied and complex needs of older adults across Merton. We support people across a broad age spectrum with clients aged 50 to 100+. At the heart of all our services is our person-centred Ask Us Anything ethos which positions us as the go-to organisation for older adults, carers and partners across health, social care and voluntary sectors. We are ever conscious of our duty to provide preventative services helping Merton residents to plan for their future and have developed a number of initiatives designed to reach older people at the lower age range, as well as providing excellent support for our traditional client base – those above state pension age.

This plan comes at a crucial point in the development of the organisation. We have spent the past three years rebuilding our organisation following a period of significant challenge. During this time we have sought to improve quality, build robust processes, enhance our credibility within health, social care and voluntary sectors,

understand the needs of older adults in the borough and establish better mechanisms to measure our impact.

This plan seeks to align closely to the *Merton Health & Wellbeing Strategy 2019–24*, *Merton Health & Care Together Plan*, *Age UK London Strategy* and the *NHS Long Term Plan*.

Our vision

A borough where everyone can love later life

Our priorities

With a strong foundation in place we are seeking to move forward with our three key priorities, improving health and wellbeing by:

- 1. **Providing high quality advice and practical support**
- 2. **Building social connection**
- 3. **Creating opportunities for lifelong active ageing**

Our values

We want to be known for:

Accessibility

The go-to place for people to ask us anything about later life

Collaboration

Working with partners across sectors to get the best outcomes for Merton's older adults

Dynamism

An organisation prepared to innovate, take risks and provide solutions

Impact

Empowering people and organisations to make a positive, tangible difference

Integrity

Robust privacy and confidentiality procedures — trusted staff and volunteers

Kindness

A supportive, empathic place to work, volunteer or receive support

Quality

Providing accredited, person-centred services, respected throughout the borough

Sustainability

Able to attract funding, generate income from diverse sources and maximise resources efficiently

Our delivery plan

To deliver against these priorities Age UK Merton will develop strong operational building blocks to create the right environment, internally and externally, for us to ensure our services are high quality and high impact and to influence policy.

Our impact

We are seeking to maximise our impact for older adults throughout Merton across a number of key themes linked to our three core priorities.

By 2022...

Providing high-quality advice and practical support

- Increased the number of older adults accessing good quality information & advice
- Improved access to advice across Merton
- Increased welfare benefit uptake
- Delivered key messages to improve Later Life Planning
- Retained Advice Quality Standard
- Increased the number of older adults receiving support at home to stay independent
- Improved navigation across the organisation and throughout Merton with more clients accessing multiple Age UK Merton services and better access to external services

Building social connection

- Developed a dynamic, diverse social activity programme, providing a greater variety of opportunities to connect, build relationships and access good nutrition
- Increased reach to Merton's most isolated older adults through befriending and other programmes
- Improved diversity increasing the number of clients supported from BAME and LGBTQ+ communities
- Improved feelings of connection and mental wellbeing for our clients

Creating opportunities for lifelong active ageing

- Increased the number of clients accessing regular physical activity programmes
- Delivered key messages and campaigns across the borough promoting Active Ageing
- Improved or maintained physical wellbeing for our clients



People

- Increased the number of volunteers and improved volunteering experience
- Increased capability of our staff team
- Reduced staff turnover

Influence

- Improved our reputation with partners in health, social care and voluntary sectors
- Increased representation of older adults on strategic boards
- Delivering more services partnership

Processes

- Improved efficiency through better internal processes
- Retained Age UK Charity Quality Standard
- Improved impact monitoring processes

Sustainability

- Increasing income
- Stabilising reserves
- Retaining control over expenditure



‘A borough where
everyone can **love**
later life.’

Why is our work important?

Established in 1950, Age UK Merton is now the leading organisation in Merton specialising in supporting older adults and their carers right across the borough. We are unique in fulfilling both a strategic and practical role for older adults in the borough.

Background

Over the 69 years since its inception, Age UK Merton has grown to become the largest charitable provider of services for older adults in Merton, now supporting over 3,000 people a year and rising. Our impact for clients we support is significant, resulting in measurable improvements across multiple health and wellbeing indicators, making people feel healthier, more connected, more positive and better equipped to manage the challenges they face.

In recent times Age UK Merton has worked ever more closely with partners across health, social care and voluntary sectors. As systems and agencies align more closely, Age UK Merton has a critical role to play as a strategic influencer and solution provider for partners across these complex systems. We have a critical role to play in providing a more joined-up, caring and supportive environment for Merton's older adults.



Context & future projections

Place & population

Merton is an outer London borough situated south west of the City of London, bordering Wandsworth, Kingston, Sutton, Croydon and Lambeth boroughs. Merton occupies an area of 37 square kilometres and is predominately residential in character, playing a transitional role from urban to suburban neighbourhoods, neither bordering Surrey nor central London. Merton has a range of public and community assets that are important to health; there are many green spaces, vibrant libraries, educational attainment is high. In 2019, Merton has an estimated resident population of 209,400, which is projected to increase by about 3.9% to 217,500 by 2025. The age profile is predicted to shift over this time, with notable growth in the proportions of older people (65 years and older) and a decline in the 0–4-year-old population.

Health inequalities

Significant social inequalities exist within Merton. The eastern half has a younger, poorer and more ethnically mixed population. The western half is predominantly white, older and richer. Largely, as a result, people in east Merton have worse health and shorter lives.

There is a gap of 6.2 years in life expectancy for men between the 30% most deprived and 30% least deprived areas in Merton, and the gap is 3.4 years for women.

Life Expectancy at birth in Merton is 80.4 years for males and 84.2 years for females. In east Merton, life expectancy in men is 78.9 years compared to 82.1 years in west Merton. Women's life expectancy is 83.3 years in the east compared to 85.0 years in west Merton.

Healthy life expectancy

Healthy life expectancy at birth in males is 65.4 years and 66.3 years in females, therefore many residents are living a considerable proportion of their lives with ill health.

The healthy life expectancy gap between the 30% most and 30% least deprived areas is also significant: 9.4 years for men, 9.3 for women.

Therefore, someone living in a deprived ward in the east of the borough is likely to spend more than nine years more of their life in poor health than someone in a more affluent

part of the borough, which will impact on the last years of working life, on family life and on a healthy and fulfilling retirement. This is an area where Age UK Merton services can have a significant impact.

The main causes of ill health and premature deaths in Merton are cancer and circulatory disease (including coronary heart disease and stroke). Known risk factors (unhealthy diet, smoking, lack of physical activity, and alcohol) account for around 40% of total ill health. Consequently, changing patterns of unhealthy behaviour must be an important focus for prevention efforts. Furthermore, most risk factors are inversely associated with socio-economic conditions.

Ageing population

10,350 live in east Merton compared to 12,000 in west Merton. By 2025, there is expected to be an increase to 11,550 in east Merton and almost 12,800 in west Merton.



Merton has 22,350 people aged 65—84 years old (10.7% of the total population). By 2025, this is predicted to increase to 24,350 (11.2%).

An estimated 3,650 people aged 85 years and over (1.7% of the total population) currently live in Merton. By 2025 this is predicted to increase to almost 3,950 (1.8%). In 2019, 1,450 live in east Merton compared to almost 2,200 in west Merton. By 2025 there is expected to be an increase to 1,550 in the east compared to 2,400 in the west of Merton.

Increasing demand & growing complexity of need

As Merton's population ages, increasing numbers are living into older age with multiple long-term conditions such as heart disease, diabetes, cancer, mental health conditions, and dementia.

Lifestyle and socio-economic factors play a significant role in the onset of long-term conditions, many of which can be avoided or delayed with better preventative measures and healthier lifestyle choices. For example, recent evidence is emerging that healthy lifestyles such as avoidance of tobacco, alcohol, poor diet and physical inactivity can reduce the risk of dementia.

Similar healthy lifestyle choices can reduce the risk of diabetes, heart disease and other long term conditions. There needs to be a system-wide approach to address this complexity of need, with partner agencies seeking to be more creative and collaborative about the way they work with older adults living with multiple conditions, as well as a concerted programme of preventative measures to help people delay ill health in later life.

Increasingly, our clients are presenting with more complex needs meaning a significant increase in the number of contacts and resources invested. There are many likely factors contributing to this; with an ageing population, people are living longer often with multiple long-term health conditions; reduced funding for statutory providers has seen more complex cases presenting within the voluntary sector, an issue which has

been widely reported by our partners across the borough; our own research shows that older adults are more likely to delay seeking help for issues relating to health, care and finances often creating more complex issues; health, social care and voluntary services are disjointed and difficult to navigate for older adults making our support work and navigation services increasingly important but challenging to deliver.



In 2017/18, we saw demand for our services increase by 20% and for the first time the number of older adults accessing our support has gone beyond 3,000.

Impact of loneliness

Being isolated and feeling lonely has a profound negative effect on physical and mental health and wellbeing, and at the same time, those with a significant mental or physical health condition or disability may themselves be more likely to be isolated due to their condition.

This is particularly important given we have an estimated 5,900 people aged over 75 living alone. Many people who use social care services would like more social contact, with around 39.5% of users reporting that they had as much social contact as they would like (2016/17).





National research by Age UK suggests that 15% of the older population in the UK are reported to experience loneliness with **the impact of loneliness estimated to be as harmful for health as smoking 15 cigarettes a day.**

Increased falls

Falls are the leading cause of older people being admitted to hospital as an emergency. Having a fall can have a significant negative impact on long terms outcomes for older people. The Merton rate of emergency admissions for injuries due to falls for 65 year olds and over (3,262 per 100,000 population) is significantly higher than for London (2,201) and England (2,114).



In 2016/17 there were **851 emergency admissions for injuries due to falls** among people aged 65 years & over.

Our evaluation of the *Merton Older People's Falls Prevention Strategy 2015-18* highlighted challenges with falls prevention pathways across services.

Integrated care

Increased demand and complexity puts pressure on services across Merton and it is clear that better, clearer integrated pathways between services are required. Over the last 12 months, Age UK Merton has supported work by partners across health and social care to improve pathways and multi-disciplinary working. The benefits of this working have been evident in studies elsewhere in the UK. Evidence shows that integrated care models are; helping older people become aware of their own needs, and regain a sense of control and purpose in their lives; enabling independence

through practical support; reducing isolation and raising ambition by motivating and supporting older people to re-engage with interests and become more socially connected; and providing an 'extra arm' of support for older people that remains after their involvement in the programme ends.

This model of working is developing in Merton targeting older adults identified through frailty assessment; Age UK Merton has been involved in the development of this programme and needs to be involved in the delivery moving forward.

Sustainable finances

Over the past three years we have developed a diverse income strategy to generate income from a range of restricted and unrestricted sources.



Our overall income has increased by 24% since 2014/15, at the same time **our costs have only increased by 10%** demonstrating a more sustainable financial model.

Despite improvements over the past three years, ensuring continued funding remains integral to the successful delivery of our strategic plan. We expect statutory funding opportunities to continue to be challenging to access, funding from trusts and foundations to become more competitive and fundraising from businesses and public to remain difficult.

What **difference**
will we make?



Improving health and wellbeing through **high-quality advice** and **practical support**



Case study

JOSEPH'S STORY

Joseph is an 89-year-old man who lives on his own. He has an extensive medical history including COPD, glaucoma, depression, has had a kidney removed and had a stroke seven years ago. He lives alone, though his son sometimes stays over a couple of nights a week when he can. Joseph is able to manage most of his personal care, but this takes time and due to his eyesight even buttoning his shirt up can be a challenge. Joseph rarely goes out in the cold weather due to his COPD but was also unwilling to heat his home as he thought it would be too expensive. He can still use buses which he takes to various different places, but he does not go in any shops because his sight is limited. Joseph begun to suffer with depression as a result of his circumstances. He was very lonely and told us he just wished to die.

Our Advice team made a number of interventions to help Joseph improve his situation. We completed an Attendance Allowance application to maximise his income and enable him to heat his home and pay for practical support to manage his home environment through our At Home service. This has helped to make his home environment safer and easier for him to navigate. We also helped him to access Dial-a-Ride and Taxi Card to improve his access to community activities, in particular our Love to Lunch programme where he now has a nutritious lunch three times a week. Joseph has also been meeting other men at our centre, forming new friendships which have improved his outlook and mental health.



Improving access to Information & Advice

- Growing capacity
- Targeted outreach to specific communities
- Raising profile of issues affecting older people e.g. Warm & Well in Merton

Helping people to maintain independence

- Providing support in places people feel most comfortable e.g. home visits
- Practical domestic support to manage home environment
- Affordable health & wellbeing services e.g. podiatry

Improving navigation

- Holistic, person-centred needs assessment
- Joined up Age UK Merton services
- Excellent knowledge of local provision
- Strong links to partners & navigation programmes e.g. Social Prescribing
- Providing representation
- Influencing and delivering integration models

Improving health and wellbeing through **building social connection**



MARGARET'S STORY

Margaret's daughter contacted us very worried about her mother. Margaret is 86 and lives alone. She has poor mobility and mental health issues. This makes it difficult for services to work with her and for her daughter to support her. Margaret is unable to get out and about without her daughter's support. She has become increasingly isolated and was bored and frustrated at home. From our initial assessment we encouraged her to (reluctantly) try an Age UK Merton social and lunch club one day per week. We also helped her apply to Dial-a-Ride to improve access and enable her to come to our activity centre.

Since becoming part of our community, Margaret has very much enjoyed the centre and has now asked to attend more frequently each week. She is managing to interact more effectively with other people, joining in group activities. She is feeling less frustrated and valued. The day also provides a day's respite for her daughter, who was struggling with her caring role.

"Mum was isolated and not getting out. She did not seem interested in anything. Age UK worked on her to encourage her to get out and about – which she loved. I have seen a marked improvement in mum's social skills, tolerance and interactions. I have been reduced to tears to see her so happy. I don't know how I would cope without it; I can't put into words how much it has meant to me."

Case study



Combatting loneliness

- Identifying individuals at highest risk of loneliness
- Providing meaningful opportunities to connect through food, activities and interests
- Improving access for most isolated e.g. befriending at home

Influencing community cohesion

- Working in partnership with stakeholders
- Building links with smaller organisations
- Supporting smaller organisations to develop through generous leadership



Increasing diversity

- Improving access to services with specific communities
- New initiatives designed to appeal to BAME, LGBTQ+ and other protected characteristics
- Building cross cultural connection through food, activities and interests

Improving health and wellbeing through **promoting and creating opportunities for lifelong active ageing**



Case study



GLADYS' STORY

Gladys, 74, was referred to our Activity Centre via her GP in July 2018, as part of our Joint Pain Management project.

She was suffering severe left shoulder and back pain, which was restricting her mobility and causing her to lose sleep. She scored her pain at seven out of 10 for severity. At that point she couldn't raise her arm from her waist without experiencing significant pain.

As part of our assessment we identified a number of exercise options for Gladys which could help her to improve mobility and reduce the pain she was experiencing. Gladys decided that our weekly Rhythm & Movement class would suit her well as she enjoyed music and felt the gentle exercise would enable her to build her range of movement, strength and stability.

Gladys has been attending weekly for over six months and has seen significant improvement in her mobility and wellbeing. She can now lift her arm well above her head without pain and puts this difference down to her attendance at the Rhythm and Movement class. She has also enjoyed exercising with other people and making new friends through the warm and welcoming atmosphere.



Changing behaviour

- Supporting 'Make Every Contact Count' initiatives to influence professionals
- Creating realistic personal goals with clients
- Ongoing motivation
- Reinforcing healthy lifestyles messaging across services

Providing opportunities to exercise

- Delivering fun, engaging programme of activities catering to all needs and interests
- Expert tuition, support and advice
- Developing innovative new activities

Changing perception

- Delivering key messages about the benefits of physical activity
- Transforming our visual branding
- Real-life case studies
- Positive campaigning

How will we make a difference?

Building blocks

Influence

- Supporting behaviour change in clients
- Informing and advising policy makers and commissioners
- Representing Age UK Merton on strategic & delivery boards
- Raising the profile of ageing well within community

Sustainability

- Strong, positive, supportive organisational culture
- Clear demonstration of impact
- Diverse income strategy
- Efficient use of resources
- Intelligent use of technology solutions

People

- Methodical and considered recruitment processes
- Listening to clients, volunteers, staff and partners to make informed decisions
- Implementing high quality learning and development programme for staff and volunteers
- Supporting staff & volunteer wellbeing

Processes

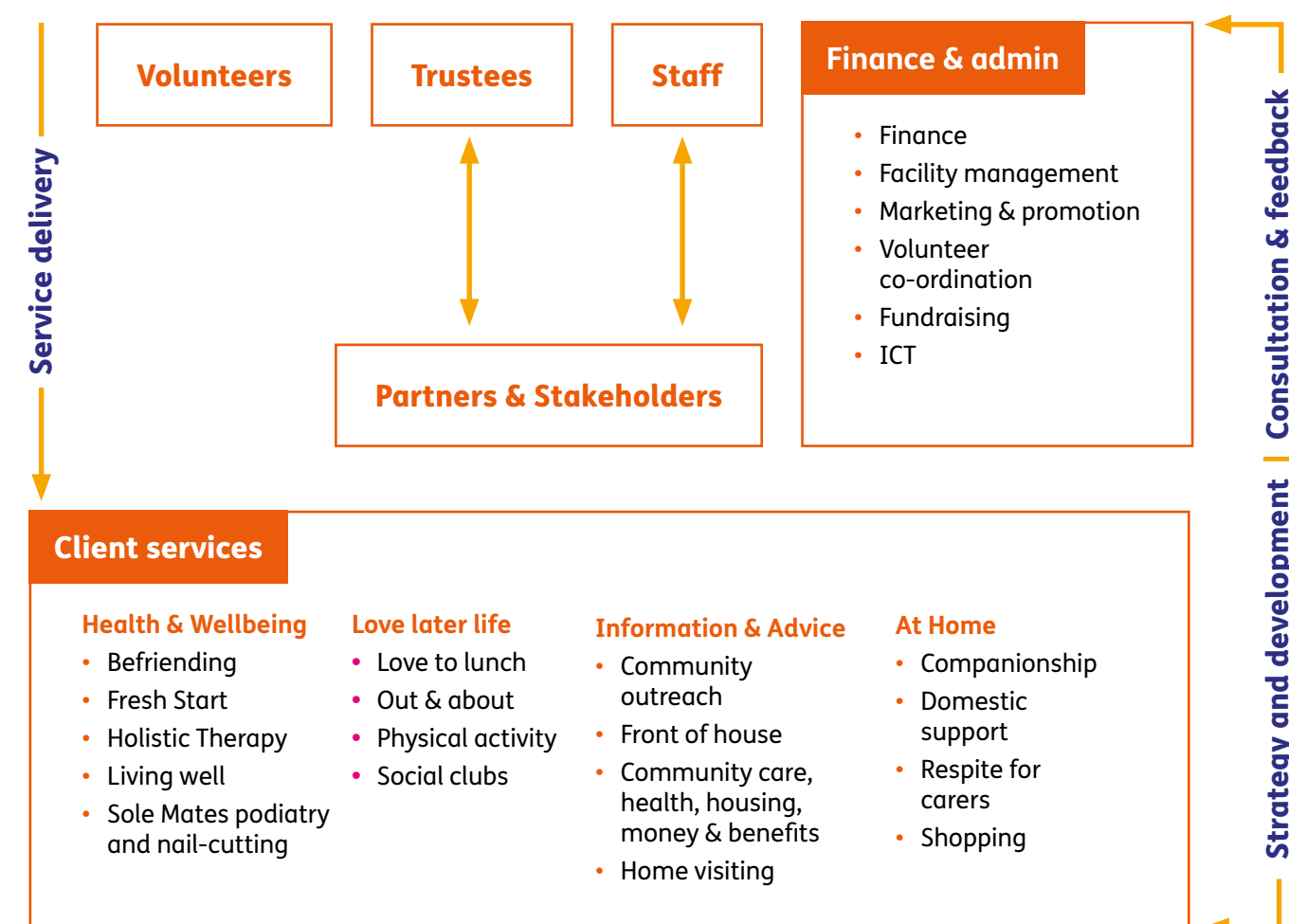
- Maintaining high quality organisational policies and procedures through Age UK Quality Standards & Advice Quality Standard
- Clear referral pathways internally and with partners
- Compliant finance & governance
- Strong impact measurement processes

Organisational structure

Successful delivery of this strategic plan depends on a clear and robust structure where all stakeholders understand their role and are given the right environment in which to deliver. Age UK Merton has carefully cultivated a positive and transparent delivery model where individuals and teams understand their strengths and objectives,

whilst feeling confident to seek help and collaborate to achieve the organisation's wider objectives. We will continue to foster strong working relationships between staff, volunteers, clients and partners to ensure that we deliver our strategic objectives.

Importantly we position our clients and our partners at the heart of everything we do, learning from their experiences, challenges and needs and shaping our services accordingly to ensure we remain relevant and impactful.





Our volunteers

“I look forward to your visits,
I used to be so lonely, you’re
better than all the medication!”

None of our plans would be possible
without our volunteers.

If you’re interested in finding out how
you can help make a difference to local
older people, learn new skills and make
connections in your community get
in touch.

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