

Strategic Plan

2023-2026



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Introduction

We are delighted to present to you Age UK Mid Mersey's new 3-year strategic plan, setting out our priorities and direction for the next three years. Our new strategy is outlined under 4 key priorities and is designed to ensure we continue to build organisational resilience, protect future sustainability and raise the organisation's profile and positioning.

The Board and Senior Leadership Team of the Charity have taken a conscious and proactive approach to our strategy planning over the last 6 months and have taken time to undertake a detailed review of the organisation. We have consulted widely with clients, staff, and volunteers through surveys and independently run development days/workshops and we have commissioned a consultant to undertake specific business reviews of our charitable activities and scope for paid for services. We have listened carefully to what was said and our strategy addresses the areas people said were important to them, areas where they felt we should prioritise and develop, and where they believed we could make improvements.

We are very pleased with the progress that our charity has made during the scope of the last strategic plan, however, the world is a very different place today than it was in 2019 prior to the pandemic and the sector is under immense pressure, both financially and increased demand for services. The global pandemic, cost of living crisis, changes to health and social care, and demand for our help locally led us to take a detailed look at the organisation infrastructure and the services and activities we provide across Mid Mersey.

As a result of this review we have invested heavily in IT and Quality to support staff in service delivery and to enhance our reporting via Charity Log - our client management system. We have invested in our people and have implemented a new pay grading structure supported by a competency framework that provides a clear pathway for advancement and development within the organisation and will ensure we retain and attract highly skilled people. The decline in volunteering experienced during the pandemic has proven difficult to reverse and so we have taken time to review our volunteer roles and skill requirements and have recently launched a new volunteer recruitment campaign to attract new volunteers. We hope to see our volunteer numbers increase significantly during the next 3 years.

We have re-modelled our services and adopted a core offer – 'Living Well Service' that provides a holistic range of wrap-around health, wellbeing, care and support services which offer more independence, informed choice and greater control.

We are confident in our core approach and proud of the support we provide, however, as we look to the future we must do more to raise our profile and demonstrate what sets us apart from other providers, by articulating how and why our approach works, as well as what it achieves in terms of additional value.

We are proud of our successes and achievements. Cash reserves, prudent financial management and scrutiny of organisational spending against budget has ensured that the organisation is in a relatively healthy financial position. However, we are realistic about the challenges ahead. Funding from external sources is in decline and we are presenting a deficit budget for the forthcoming year. We recognise that without significant investment, the organisation is unlikely to be able to increase capacity to meet the growing demands of people aged 50+. Securing the sale of the Mansion House will be fundamental to securing our future and will allow our Board of Trustees to take a refreshed approach to reserves to support the development of new growth opportunities to extend our offer of support to older people, alongside the management and mitigation of our identified risks.



Peter Stubbs
Peter Stubbs, Chair of Trustees



Shelley Brown
Shelley Brown, CEO

About Age UK Mid Mersey

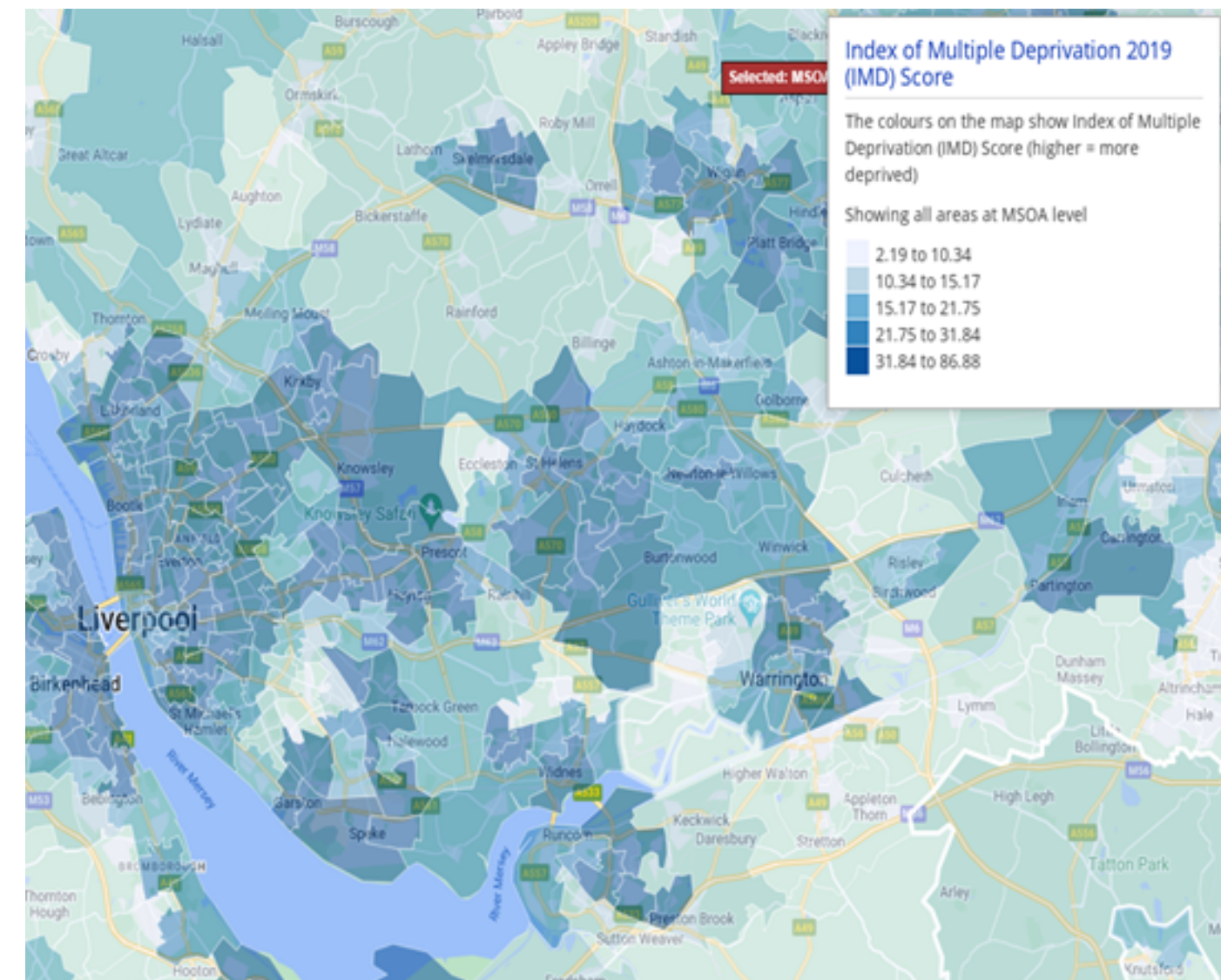
Mid Mersey region
has a population of
270,000 individuals
aged 50+

Healthy life expectancy
(how long one can expect
to live in good health) is
below the England
average in Halton,
Knowsley and St Helens.

Knowsley has the
2nd highest Fuel
Poverty Risk
Score

29.4% of people aged
50+ in the Mid Mersey
region are living in poverty
with Halton and Knowsley
ranked as two of the most
deprived local authority
districts in the Mid Mersey
region.

On average, **34%**
of people aged over
65 live alone



The Mid Mersey footprint (Halton, St Helens, Knowsley and Warrington) covers an area with long standing inequalities in health and pockets of significant deprivation.

Our Vision

*'To promote improved quality of life and empowerment
for people aged 50+ and their carers.'*



Our Mission

- To be **Enabling** – enabling people aged 50+ to make informed decisions about their lives
- To be **Caring** – passionate about our work with people aged 50+
- To be **Influential** – draw strength from the combined voices of people aged 50+
- To be **Pro-Active** – innovative, effective and outcomes focused
- To share our **Expertise** – be authoritative, be trusted and be quality orientated

Our Values

- Continually strive for excellence
- Value, promote and protect over 50s' welfare, health and wellbeing
- Treat all people fairly, positively, equally and with respect
- Act with integrity
- Be transparent and accountable for our actions



We put our values into action by...

- Independently speaking out on what affects people the most.
- Campaigning to improve policy and attitudes in partnership with others.
- Developing excellent local services to meet and fulfil unmet need.

Shaping our future

The charity has taken a proactive approach in the development of our next strategic plan and listening to our clients, staff and volunteers has been a fundamental part of this process. This summarises what they told us;

Findings and outcomes from local surveys and consultations such the ***St Helen's Over 50s Strategy*** have identified a number of key themes and factors that are important to local people aged 50+ in maintaining a good quality later life.

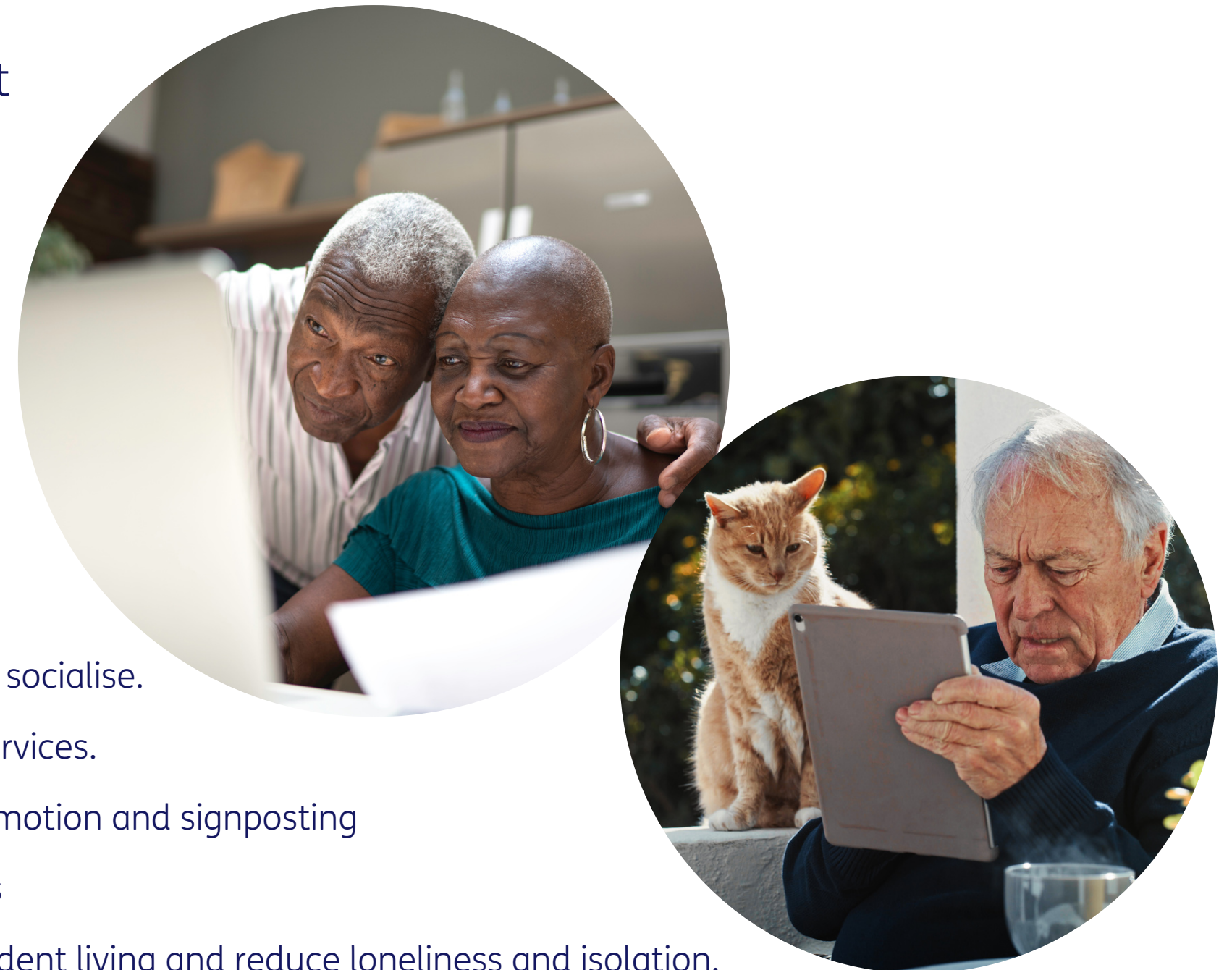
Connectivity – more face-to-face services and the ability to travel easily and socialise.

Access – improved access to GPs, mobile health, community spaces and local services.

Communication & Co-ordination – better information sharing, promotion and signposting

Transport – Improve transport and remove barriers to accessing local services

Independence & Isolation – funding for services which support independent living and reduce loneliness and isolation.



Our Strengths

Main motivators for being part of Age UK Mid Mersey

(summarised from staff survey, Feb 2023)

- Provide quality support to people aged 50+ in Mid Mersey
- Improve the physical and mental wellbeing of people aged 50+
- Make a valuable difference to the lives of people aged 50+
- Compassionate and caring organisation
- Staff gain satisfaction from the impact the work makes
- Career development for staff whilst helping others

From SWOT analysis

(carried out by Thrivability, Feb 2023)

- Positive and well-known local reputation
- Brand partner of one of the best-known charities in the UK
- Strong core purpose
- Award-winning
- Ambitious leadership and prudent financial management
- Services are delivered within a consistent, national, quality framework standard
- At the forefront of improving mental health and wellbeing in older age and incorporating approaches to tackling loneliness collaboratively with partners
- Community and client focused
- Proactive investment in building organisational infrastructure and developing new ways of working



What could we do differently?

- Consider wider range of communication methods
- Remain focused on strategic priorities – no mission shift
- Structure lines of accountability
- Invest in our people to retain and attract staff – training, core skills, development opportunities

- ✓ **Do what we do well - be strong and proud**
- ✓ **Don't dilute, don't take our eye off ball**
- ✓ **Consider the impact on the team**

Living Well

Our Living Well service model is holistic and person-centered, meaning that staff are able to provide one to one personalised information and advice, activities and support, helping people achieve a quality of life that enables them to live independently in the way that they choose.

By taking a holistic approach we are able to coordinate different aspects of the system - whether it's by making people aware of other services available, providing guidance on the most appropriate services, assisting professionals with information and referrals or helping clients to navigate between different parts of the system.

We provide a single point of access for all clients conducting a wellbeing assessment with trained Wellbeing Officers, to identify the needs of clients in relation to Loneliness & Isolation, Mental Health & Wellbeing, Safeguarding and Accessibility to services and benchmarking these areas against risk indicators to allow proactive intervention/referrals to appropriate support. Robust screening of clients allows us to address health inequalities by focusing support on people with high levels of need, including those living with multiple long-term conditions.

Wellbeing activities and services reflect the core themes of **Health & Wellbeing**, **Sociality**, **Independence** and **Staying Connected** and are designed to support a more fulfilling and independent life; reducing pressure on social/health services and improving physical and mental wellbeing and resilience.

Healthy and Well ❄️



Socially 📅



Independently! 🗣️



Connected 🤝



Strategic Priorities

2023-2026

1.

***Build
Organisational
Resilience***

2.

***Our
People***

3.

***Service
Development***

4.

***Raise Profile
& Positioning***

1.

Build Organisational Resilience

**To ensure we remain
sustainable and continue to
support people aged 50+ in
Mid Mersey, we will...**

explore new income generating initiatives and opportunities

enhance our operational capability by investing in processes and systems

maintain the highest levels of governance within Age UK Mid Mersey (in line with Charity Commission Standards, recognised quality standards etc.)

ensure work streams are effective and resources are efficiently allocated

improve digital and data systems to ensure we have robust information available to us and will learn and improve based on this evidence

evaluate the continued benefits/constraints associated with the premises we occupy and assess alternatives as appropriate

embrace and embed social value, full cost recovery and social return on investment principles within decision-making and planning processes

2.

Our People

**To invest in our people to ensure
we create a highly skilled and
caring workforce, we will...**

invest in our people by offering an attractive employment package to include a range of benefits, enhancement and professional development opportunities.

foster a positive work environment that promotes employee safety, growth and goal attainment

leverage the skills, experience, and expertise of volunteers by growing and expanding the volunteer base

take positive steps to ensure our organisation is diverse, equitable and inclusive

take positive steps to ensure that the mental and physical wellbeing of our people is supported

have a board of trustees that are equipped and engaged to deliver the organisational vision

3.

Service Development

**To continue supporting
people aged 50+ to live well,
we will...**

align Age UK Mid Mersey's Living Well service framework to local system pathways

build on and develop new relationships within the emerging integrated care boards and partnerships, commissioners, health and social care partners, other third sector organisations and the private sector to achieve the best outcomes for people aged 50+ in Mid Mersey

develop an outcomes framework that will evidence the impact and change we are making to the lives of people aged 50+

further our reach into the diverse communities of Mid Mersey, ensuring we are accessible and inclusive in all we do

ensure our services are delivered to the highest possible quality

continue to engage and consult with people aged 50+ to gain a wider understanding of their needs

be proactive leaders in provision of services for people aged 50+

4.

Raise Profile & Positioning

**To strengthen the
organisation's credibility
and positioning, we will...**

invest in the development of a comprehensive PR Strategy that will build awareness and trust in the organisation

research and apply for suitable external awards and recognition to demonstrate the impact and value of the work we do

maintain trust and confidence by ensuring all our services are underpinned by quality standards, positive outcomes and evidence

use a range of creative research and engagement mechanisms



For Information and
Advice Contact Us Via:
Telephone - 0300 003 1992
Email - enquiries@aukmm.org.uk

Registered Charity Number: 1003476
Company Number: 02625647
Registered Office: The Mansion House, Victoria Park, City
Road, St.Helens, WA10 2UE

 **Age UK Mid Mersey**

 **@ageukmidmersey**

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