



Strategy 2018-21

For a city in which older people live independently, with choice and control over their lives, in the best health possible, free from poverty and loneliness.

Consultation draft

Contents

SECTION		PAGE
BACKGROUND		
	Introduction	3
	Strategy priorities – at a glance	5
1	About Age UK Sheffield	6
2	Older people in Sheffield	7
3	Age UK - the national context	8
SERVICE DELIVERY AND THE FUTURE		
4	Information and Advice services (I&A)	9
5	Independent Living Co-ordination (ILC) services	10
6	Paid for services in the home	11
7	Building-based service delivery	13
8	Widening the scope of our work	15
FUNDRAISING		
9	Fundraising for ILC and I&A services	16
10	Enterprises insurance trading	17
11	Retail and other commercial options	18
12	General fundraising and legacy marketing	19
13	New markets	20
14	Capital projects	22
15	Investment from reserves	22
REDUCING COSTS		
16	Current position	23
17	Closer working arrangements	23
APPENDICES		
A	Action plan	24
B	Vision, mission and values	25

Background

Introduction

Thousands of older people living in Sheffield right now are in significant need of support to lead dignified and independent later lives.

The older population is growing and we believe that, in Sheffield, there are:

- 24,000 over-65s living in poverty¹
- 20,000 older people living in poor quality housing
- 12,000 older people who are often or always lonely; it is estimated that by 2020 there will be more than 35,000 people aged 65 or over live alone in the city²
- 12,000 older people with an unmet social care need
- 7,135 people aged 65 or over will have dementia by 2020³

Age UK Sheffield exists to provide the advice and services to these thousands of older people in our city, support that they would not get from anywhere else.

But, at a time when these needs are rising, our resources to provide this support are reducing. Policy makers and statutory service providers have known of this growing need but the funding to meet those needs has, largely, not materialised.

The local Care Home Wellbeing Needs Assessment (2013) stated: “Sheffield spends too much money on the most intensive or acute health and social support which will become more and more unaffordable. We need to shift our focus to promoting health and wellbeing throughout life.”⁴

The city’s Health and Wellbeing Strategy (2013) added: “We will prioritise upstream activity, support early intervention and prevent issues escalating at the earliest opportunity. A focus on prevention and early intervention is the key means of making Sheffield’s health and social care system sustainable.”⁵

The Sheffield Joint Strategic Needs Assessment (2013) noted: “The length of stay in hospital in Sheffield is too high and this is an issue particularly for older people. In an audit in Sheffield in 2010, of a sample of people aged over 75 who were admitted to hospital in an emergency, 49% did not meet the criteria for admission.”⁶

This strategy reasserts the importance of seeking the statutory, contract and grant aid funding which will enable Age UK Sheffield to help older people out of poverty, to reduce their dependence on the health and social care system, and to increase their ability to live fulfilled and independent later lives.

But the recent past has shown that we cannot depend on statutory funding to secure the future of our charitable services, so this strategy is necessarily a transformative one.

¹ Number supplied by Sheffield’s public health team

² Number supplied by Sheffield’s public health team

³ Number supplied by Sheffield’s public health team

⁴ Sheffield Care Home Well Being Needs Assessment (October 2013), page 10

⁵ Sheffield Joint Health and Wellbeing Strategy 2013-18, page 13

⁶ Sheffield’s Joint Strategic Needs Assessment (July 2013), page 56

Background

It states the need for Age UK Sheffield to develop a more diverse and cost-effective range of services which are more attractive to private funders and touch many more older people than we currently deliver to.

We need to take some calculated risks to build more independent sources of funding through our trading arm and fundraising activities. And we need to be brave in collaborating with like-minded partners to minimise the costs which support our service delivery.

Our future grows ever more challenging. But there is a clear need for a charity whose aim is to support the independence and wellbeing of people aged 50 and over in Sheffield.

This strategy aims to ensure Age UK Sheffield develops its strength to fulfil those duties long into the future.

David Campbell, Chair

Steve Chu, Chief Executive

February 2018

Our vision is: “For a city in which older people live independently, with choice and control over their lives, in the best health possible, free from poverty and loneliness.”

Our mission is: “To support older people in Sheffield by providing information, advice, advocacy and services which are recognised as a vital part of Sheffield’s infrastructure. We will work in partnership with local statutory and voluntary organisations to benefit, represent and champion the needs of older people in Sheffield.”

Background

Strategy priorities – At a glance

This strategy clearly states the need for the information, advice, advocacy and services delivered by Age UK Sheffield, and makes the case for continued and improved grant and contract funding for that work.

The strategy also seeks to be a transformative one in how we generate new and improved sources of unrestricted funding to deliver our charitable services, and how we need to collaborate to reduce back office costs and protect the resources available for frontline services.

In summary, the priorities set out in this strategy are:

- Strengthening local understanding of our services, what makes them unique in the city, and being seen as a vital part of the health and social care infrastructure in Sheffield.
- Strengthening our ability to deliver lower cost, volunteer-led activities, in more parts of the city, and hopefully in our own premises.
- Seeking new and innovative ways to generate unrestricted funding.
- Considering widening the scope of our contract delivery work, where this would deliver a benefit to older people in Sheffield.
- Developing our own premises, to help develop our long-term sustainability, deliver new services, and raise the profile of Age UK Sheffield.
- Working with other organisations wherever we can to protect services and reduce indirect costs (so we put more into supporting older people).

Background

1. About Age UK Sheffield

Age UK Sheffield is a local charity and social enterprise which exists for the benefit of people aged 50 and over in Sheffield. It does that by providing information, advice, representation and services.

We believe our independent living services are unique in Sheffield. We are the only organisation in the city that is totally dedicated to promoting the independence of older people using a holistic approach. We believe we have a unique offer to the city in supporting older peoples' needs, not from the approach of a specific organisation or sector, but as a whole. We offer housing support but we are not a housing association. We offer health support but we are not a health service. We have expertise in dementia and memory loss but we are not a mental health organisation. We help older people to access benefits that they are entitled to but weren't previously claiming, but we are not financial advisors. We care deeply for our customers but we are not carers.

Age UK Sheffield is the glue that can hold all those various pieces together for the people we work with.

Like all local Age UKs we are a local, independent organisation, rooted in Sheffield, with all our Trustees living in the city and the surrounding area. We have a brand partnership agreement with the national Age UK charity but have freedom in the services we choose to provide, and how we choose to provide them.

Our approach to our work in Sheffield is to focus on the high quality and professional support and services which we know older people value, need, and deserve. We hold the ISO9001 quality standard; we are one of only three organisations in Sheffield which holds the Advice Quality Standard; and we are accredited by the Contractors Health and Safety Association. This emphasis on quality sets us apart from many of our competitors in the provision of services to older people in Sheffield. We will not compete in low cost, lower quality markets for caring and support services. Whilst we are a charity that benefits from voluntary input, this emphasis on quality also means our services will be professionally-led and delivered.

Age UK Sheffield has a core belief that older people should have access to the information, advice, representation and services that will enable them to live independent later lives to the best of their ability, in the best health possible, free from poverty and loneliness.

We believe that nobody else in Sheffield stands up for older people in the way we do. We have a responsibility to those people, and to our city, to protect and develop our charity to benefit Sheffield's older people for years to come.

Background

2. Older people in Sheffield

Age UK Sheffield operates within the boundaries of Sheffield City Council, the third largest local authority area in the UK. The city has a total population of 573,054, of which 93,400 (16%) are aged over 65⁷.

People aged 65-69	25,300
People aged 70-74	23,800
People aged 75-79	17,600
People aged 80-84	13,700
People aged 85-89	8,200
People aged 90 and over	4,800
Total population aged 65 and over	93,400
People aged 55-64	59,100

Poverty

Poverty represents a significant problem for older people in Sheffield. It is estimated that 23,966 people aged 65 or over (more than one quarter) are living in poverty in the city.

Loneliness

It is predicted that by 2020 there will be 35,700 people aged 65 or over living alone in Sheffield. The proportion of adult social care users in Sheffield who have as much social contact as they would like is below 40%.

These figures correspond to a local extrapolation of national Age UK figures, which would indicate that around 12,000 older people in Sheffield are often or always lonely.

Long-term health conditions

In early 2018, over half of the over-65 population of Sheffield (52,532 people) were living with more than one long-term health condition. 39% of over-50s (76,150 people) were living with more than one long-term health condition.

Vision and mission

These stark and damning statistics provide Age UK Sheffield with a clear vision and mission.

Our vision is: “For a city in which older people live independently, with choice and control over their lives, in the best health possible, free from poverty and loneliness.”

Our mission is: “To support older people in Sheffield by providing information, advice, advocacy and services which are recognised as a vital part of Sheffield’s infrastructure. We will work in partnership with local statutory and voluntary organisations to benefit, represent and champion the needs of older people in Sheffield.”

In consultation with our staff, we have updated our organisational values. These are listed in Appendix 2.

⁷ Unless stated otherwise, all figures on this page were supplied by the Sheffield public health team

Background

3. Age UK – the national context

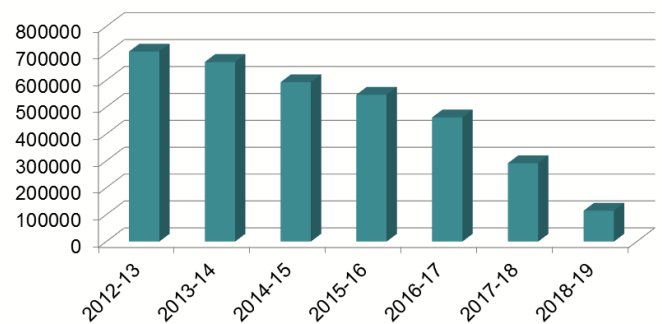
Older people in Sheffield have, for decades, received high quality support from Age UK Sheffield and its predecessors, just as has happened in local areas throughout the majority of England and Wales. In most cases these services have historically been largely funded through local authority grants or commissioning.

Changes to the financial environment which are affecting Age UK Sheffield are mirrored right across the Age UK network in most parts of the country.

These include:

- Declining Local Authority and other statutory sector funding for local Age UK Brand Partners
- Increased competition to deliver services to older people, from non-traditional threats
- Lack of funds for the provision of Information and Advice services free at the point of delivery
- A varying offer for paid-for services, both in the home and building-based “day care” which means the network’s offer is not as cohesive, marketable, or cost-efficient as it could be

Sheffield City Council funding to Age UK Sheffield



The declining statutory funding environment has been exacerbated by a significant reduction in income through the Age UK insurance trading business. Taken together, this funding crisis presents a threat to the viability of the local Age UK Brand Partner network in its current form.

Some local Brand Partners are positively addressing these challenges by working more closely together or, in some cases, merging. As statutory funding declines, it makes sense to consolidate the cost of back office activities which are needed to enable frontline services to be delivered.

This is something that Age UK Sheffield is keen to explore, to lower its proportion of central costs compared to its total income, and protect our services to older people. Further commentary on this issue is developed later in this strategy.

Age UK Sheffield believes it is important to contribute to the strength of the network at a national level, within Age UK and the Age England Association. We have a huge amount of knowledge and skills to offer and we benefit from having influence and contacts through the network.

Service Delivery and the Future

4. Information and Advice (I&A)

Our service

The provision of information and advice, free to customers at the point of service delivery, is one of the main requirements of our Brand Partnership Agreement with Age UK.

The Age UK Sheffield I&A service is heavily used and highly-regarded. In 2016/17, the I&A service handled 4,077 customer enquiries. 38% of these enquiries were for benefits advice, and we also provide advice on a wide range of other topics, such as residential and non-residential care, housing, consumer, legal and financial issues.

In 2017 our I&A service was successful in passing through the Age UK Information and Advice Quality Programme (IAQP), which is currently held by around one-third of the Age UK network. In doing so, we now one of a handful of organisations in Sheffield which hold the Advice Quality Standard.

Our I&A service is currently delivered through one office base in Sheffield City Centre, with some outreach sessions arranged on an ad-hoc basis.

Other local providers of similar services

The main other Advice Quality Standard-accredited organisation which works with older people in the city is Sheffield Citizens Advice Bureau. Our relationship with the CAB has historically been a co-operative one, with demand on both our organisations high. Where appropriate, we signpost customers to each other, according to the organisation that is best-placed to provide advice.

Sheffield CAB is regarded as a strategically important organisation in the city's infrastructure in a way that Age UK Sheffield should aspire to.

Future aims

Providing free information and advice to older people is at the core of our work, and is vitally needed in Sheffield. There is no other provider who has the time or expertise to support older people in the way we do. Given that we believe there are 19,000 over-65s in Sheffield living in poverty, there is evidence of need for us to be able to support more than the 4,000 people per year we do currently.

Embedding our information and advice service as one that is understood by policy makers to be vitally important to the city should therefore be a key strategic aim.

In recent years we have developed our provision of information and advice on an outreach basis, in local community settings, and the extension of this work is a key aspiration.

Service Delivery and the Future

5. Independent Living Co-ordination (ILC) services

Our service

Our ILC service represents the Gold Standard in supporting older people to live independent and fulfilling lives. We take a holistic, person-centred approach which supports the whole family environment, and is built on essential features of:

- Empowering the person we are supporting, using guided conversations to understand their needs and aspirations
- Co-ordinating services and resources around the needs of the individual, putting the person first
- Understanding that support for carers and family members may be integral to the independence of the individual
- Building independence, control and support networks so that when our service ends, the person is ready and empowered to continue living well
- Continuing to be available to provide support if the person's circumstances change after our service ends

We believe our ILC service is unique in Sheffield. It provides long-term information, advice, advocacy, and signposting support to older people in their home. We go the extra mile to enable people to live the best and most independent life they can.

Other local providers of similar services

Our ILC service is, at times, confused with other “social prescription” or advocacy services in the city. Through evaluation of our services, we have accumulated evidence that our ILC service helps to improve people's financial, physical and mental wellbeing, and social connections.

Providers of similar services include statutory and other voluntary sector providers in the city. There are also more volunteer-based services which deliver a lower-cost initial intervention but do not address people's holistic needs, and are therefore more expensive to individuals, families and the health and social care system in the long-term.

Future aims

Our ILC services are in significant demand throughout Sheffield. Every day, our ILCs see huge evidence of the vital need for this service to continue. It is currently supported by a combination of grants and contracts, all of which expire at some point between now and the end of 2019. We are committed to seeking the funding to enable us to continue delivering the ILC service. To do that, it is strategically important for us to:

- Find a way to develop a wider understanding of the difference between our ILC service and other similar services.
- To embed a clear brand which is Commissioner-friendly and simply explains the service.
- To promote a balanced Commissioner focus between quality, initial price, and long-term system costs.
- To build on grant support received from other charities to fund the ILC service by approaching other potential funders based on the long-term health conditions we know our customers are living with.

Service Delivery and the Future

6. Paid-for services in the home

Our service

At Home with Age UK Sheffield is the brand name of our paid-for service in the home. It provides personal assistant-type services, helping older people to get out and about, collect their shopping, have a chat whilst doing jobs around their house or helping with their mail.

Customer feedback indicates that satisfaction levels are high because we always provide the full hour's service, aim to provide the same support worker every time, and we don't make a profit. However, due to the need to cover our costs at a relatively low volume, the price per hour has made recruitment of new customers challenging.

We currently provide only non-regulated services. Unlike some other local Age UK Brand Partners, we do not currently deliver CQC-regulated services such as domiciliary care.

Other local providers of similar services

There are a number of other private sector providers of non-regulated, paid-for home support to older people. The price per hour of our service is comparable to our main competitors but is sometimes viewed as expensive "for a charity".

Age UK Sheffield's price reflects our commitment to providing a good quality service, by committed staff who have reasonable employment rights including paid annual leave and a sickness allowance. As a charity we believe our values of caring for our staff and being deeply committed to our customers set us apart from commercial providers who must make a profit. Any small surpluses we do make are reinvested back into charitable services.

Our customers report that they choose us because of the quality of our service, the provision of a full hour's service for the hourly rate, the provision of a regular support worker who customers get to know and trust, and our trusted brand as a charity. Any attempts to reduce the cost of our service would necessarily result in either reduced terms and conditions for our staff; or a reduced level of service for customers; or providing the service at a loss; none of which are palatable to us.

Future aims

Whilst commissioned services are subject to statutory sector funding cuts, individually paid-for services represent a market in which our work may significantly expand. People are living at home for longer, often in poorer health, and are less able to carry out basic tasks which help to maintain their independence. As families and communities become less cohesive, the availability of nearby relatives and neighbours to provide such support – such as help to collect shopping or basic home maintenance and cleaning – has reduced.

The market which currently buys those services is small but expected to grow. It is envisaged that future growth in this service provision is more likely to come from privately-funded services or through the use of personal budgets.

Strategically, therefore, we need to:

- Be clear about the quality of our offer to differentiate ourselves from other providers, at a competitive price point.

Service Delivery and the Future

- Better understand how this service can be commissioned through personal budgets.
- Pay attention to the most effective ways to market the service.

We also need to understand the full range of services which people may be prepared to buy through a trusted charity, and consider the risks and benefits of deciding to provide those services. Services provided by other local Age UKs range from handyperson services to mobile hairdressing, through to CQC-registered personal care services.

The initial aim must be to significantly develop our current At Home service provision before considering expansion into new services.

Service Delivery and the Future

7. Building-based service delivery

Our service

This section refers to the full range of group or building-based services, ranging from highly specialised day care for people living with dementia to social coffee mornings.

Our current building-based service delivery is restricted almost entirely to the Wellbeing Centre, which provides day care for people living with memory loss and dementia. This service is therapy-based and high quality, with a budget being provided for stimulating activities such as singing, dancing and pet therapy.

Customer feedback is excellent – but, in contrast to some other Brand Partners who run day centres, finding customers whose families will privately fund their places has been challenging.

This service is currently supported three days per week through a Council block contract, which is under review as part of a wider dementia review in the city, with customers who receive a Council-funded place receiving the service and transport at no cost to themselves. The Council's recent approach has been to move away from building-based day care, preferring to support volunteer-led services provided in local communities. However, there remains a significant need for building-based activities for people whose dementia is too advanced for volunteer-led activities, and their families who benefit from respite.

At the more social end of the spectrum, through our Friends of Age UK Sheffield members' club, we provide a small amount of volunteer-led social activity. In this respect, we are different from many other Age UKs, many of whom have prioritised the development of higher volume, lower cost approaches which focus on friendship and social groups, in a way that Age UK Sheffield has not in the recent past.

Other local providers of similar services

There are a number of private sector providers of “day care” for older people, including people living with dementia and memory loss. Our Wellbeing Centre aims to differentiate itself from other providers due to its high quality staffing, service provision and activity programme.

The Alzheimer's Society also provide “building-based” dementia services and dementia-specific information and advice.

Recent Sheffield Council contracts for these dementia day care services have been won by providers who already own spaces in which these services can be provided, who do not incur additional venue costs, such as care homes.

There are numerous private, community and charitable providers of low-cost friendship and social activities, such as lunch clubs, physical activities, and dementia cafes. Age UK Sheffield signposts to groups such as these but does not routinely run this type of activity.

Service Delivery and the Future

Future aims

Until 2015, Age UK Sheffield's "day centres" operated in different venues, in different parts of the city, on different days of the week. In early 2015, the operation was consolidated into a central venue in Norfolk Park to ensure a focus on quality. Whilst this has clearly been achieved, it goes against the general public policy direction in Sheffield of neighbourhood-level provision.

We believe that returning to more local provision will be preferable from both a customer and commissioner perspective. By partnering with local community venues, a reduction in room hire costs may be achievable, although this would require a different approach to service delivery from our current venue where, as permanent tenants, there are no set-up and clear-away demands.

Our development of other building-based activities is currently severely inhibited by the fact that we do not own any buildings in which to deliver them, increasing the cost, risk and time it takes to develop new activities. Even simple initiatives such as coffee mornings, a dementia café or light, year-round physical activity are constrained by the need to find a space in which to deliver them.

It could be argued that our current building-based activity offer, which is almost solely limited to the Wellbeing Centre, is a very exclusive offer that is only available to the people living with memory loss and dementia, who have successfully obtained a Council-funded place or can afford to pay for a full or half-day privately.

Our offer for older people who want to meet for a social gathering or an age-appropriate activity, at a relatively low cost, is almost non-existent. This, in turn, means our footprint, customer-base, and awareness of Age UK Sheffield's other services is low.

Through our members' club, we have developed some volunteer-led activity such as coffee mornings and digital drop-in sessions. These have proven difficult due to our lack of a venue and, until recently, the lack of a staff member responsible for volunteer co-ordination.

Through our leadership of the Council's "People Keeping Well" programme in Dore and Totley, we are also taking a community development approach to the provision of a range of new activities which are due to start in 2018. This may hint at a future strategic approach for Age UK Sheffield. By developing a range of new, volunteer-led building-based activities, we can significantly extend our offer of cost-effective services to older people.

Obtaining use of a building(s), through acquisition or partnerships, and the community development capacity to deliver low-cost services to lots of older people, must be regarded as a high priority.

Service Delivery and the Future

8. Widening the scope of our work

Older people's services in Sheffield

In summary, Age UK Sheffield currently delivers high quality services to a relatively small number of older people – around 4,000 people in 2016/17 against a Sheffield over-55 population of more than 150,000. If we are to achieve our vision of a city in which no older person lives in poverty or loneliness, there is a huge amount of potential growth to be achieved. Our ILC services are second to none, and have a great impact on people who really need it. Likewise our I&A services are of demonstrably high quality and highly-valued by those who use the service.

Our At Home and building-based services are good quality and much needed, but are viewed as relatively exclusive and expensive. Better marketing of these services, developing a clear offer, and targeting them in an effective manner has proven elusive but efforts in this respect need to be redoubled, with greater attention paid to finding the audience which will value a high quality service.

But whilst maximising our delivery of relatively higher cost, lower volume services, we must also pay attention to developing a range of lower cost, higher volume activities to serve the needs of as many older people as possible in Sheffield, and create a virtuous circle around Age UK Sheffield. People who have benefited from community-based activities may go on to be future fundraisers, volunteers, or customers of At Home, day care or insurance services.

To achieve this will require the availability of buildings in which to deliver services, and community development and volunteer co-ordination staff to enable service provision.

Widening our scope

Delivering services solely to people aged 50 and over in Sheffield is in itself a relatively exclusive audience. Certainly, in terms of statutory sector contracts, it significantly inhibits the options for us to pursue. In most businesses, if a market sector or particular geographical area is proving difficult or being closed off, there is the ability to seek new markets in which to compete. Under our charitable objects, we do not have that opportunity.

However, we know that the quality of our ILC services mean they could usefully be provided to a much wider audience. For example, our holistic, person-centred approach would be equally applicable to “troubled families” or some drugs and alcohol users. And our ILC services are relatively unique within the Age UK network – few other Brand Partners deliver such a service.

Through our trading arm, through the lifetime of this strategy, we intend to take a wider approach to the potential markets available to us. Our priority will always be older people in Sheffield. But if a contract becomes available, in Sheffield or elsewhere, that we have the skills to deliver, then we will evaluate whether by successfully delivering that contract through our trading arm, we can also further our aims of supporting our services to older people in Sheffield. In doing this, we will at all times adhere to the Age UK Brand Partnership Agreement and be aware of the sensitivities of the local Brand Partner.

Fundraising

9. Fundraising for ILC and I&A services

All our ILC and I&A services are provided free to customers at the point of service delivery.

I&A services are currently largely supported by a generous, annual grant from our long-standing supporters at Westfield Healthcare Charitable Trust. We must never take this for granted. Additionally, we have received a three-year grant from the Henry Smith Charity, and have experienced a good level of success at bidding to national Age UK projects to deliver I&A services.

We cannot rely on any of these sources of funding continuing indefinitely, and must seek to develop some more independent income sources to sustain our I&A service at the level to which we would like it to operate.

Our ILC services are funded through a number of different grants and contracts, some of which operate on a hand-to-mouth existence, while others are funded on three-year agreements up to 2019.

Statutory funding for ILC services is currently only received from NHS Sheffield Clinical Commissioning Group, which is experiencing its own funding pressures. It was hoped that the Age UK Integrated Care Pilot, delivered from 2015-16, would prove the case for ongoing funding. Whilst intuitively, it is believed that improving the independence of people with multiple long-term health conditions must reduce demand on the NHS, this has been difficult to prove academically. The necessary data is not owned by us and, even if reduced demand could be evidenced, we would subsequently be trying to prove that the reduced demand could be attributed solely to our work.

We know that many GPs and their practices within the city are strong supporters of our service and the positive impact we have on their patients. We will continue to respond to requests to support their work, to the best of our ability within the funding available to us, to deliver (for example) Patient Activation Measure assessments and multi-disciplinary working. We also believe we should be a provider of choice for Home to Hospital projects and Personalised Health Budgets, among others.

Our ILC service has historically received support from national and local cancer charities (currently Weston Park Cancer Charity) and this is another area in which we may seek to pursue service funding. Analysis of our customer data shows we work with people with a wide range of long-term conditions. We are interested in pursuing bespoke ILC services targeted at particular audiences of interest to potential funding sources.

Fundraising

10. Enterprises insurance trading

Age UK Sheffield Enterprises sells insurance and other older people's products and services as a member of the national Age UK Enterprises Trading Alliance.

Insurance commissions have been a significant contributor to our unrestricted income streams for decades. However, they have been steadily declining in recent years and, from April 2018, commission levels will drop significantly.

Age UK Sheffield will continue to trade at appropriate levels with the aim of generating a surplus to contribute to our charitable work. As one of a relatively small number of Brand Partners which are continuing to trade in this way, we hope to pick up some new business. However, it must be recognised that the level of commissions available to us are likely to be lower than in previous years, and this will have a consequent effect on the overall income for the charity.

The current Trading Alliance Agreement runs until March 2021, at which time the national offer may change again. With a reduced number of Brand Partners delivering insurance trading, we will aim to maximise income between 2018 and 2021, and make the case both locally and nationally for a beneficial new agreement from 2021 onwards.

Fundraising

11. Retail and other commercial options

With funding from our traditional income sources having either been lost, reduced, or under threat, the development of new income sources will be essential to the long-term sustainability of the charity and the services we provide.

Retail is one significant market in which many other Brand Partners operate, some with a reasonable degree of success, but Age UK Sheffield does not. It is true that some Brand Partners fail to deliver a meaningful surplus on the retail operations, and the market in Sheffield has to some extent been cornered by other charities. However, there are no other areas of unrestricted funding which have proven to be fairly reliable at contributing towards charitable objectives within the Age UK network, which Age UK Sheffield has not actively sought to develop.

Returning to the earlier theme of developing services and resources which touch more older people than we do at present, the presence of some local retail outlets may also literally be the front door into a range of other Age UK Sheffield services.

The development of a small retail operation would require an up-front investment and some risks in terms of their ongoing success. However, we have received some recent legacy income which is available for Trustees to invest as they see fit, and there are models of success in developing a retail operation which can be followed. Retail should not be seen as a golden bullet, but the careful development a small number of high-performing shops is one of the only known ways in which we can have a reasonable level of certainty of generating some independently-sourced funds to contribute to making our I&A service sustainable in the long term. Business plans to consider the development of a retail operation will be developed early in this strategy.

Options for more bespoke retail operations, such as white goods and furniture may also be considered.

Fundraising

12. General fundraising and legacy marketing

It has been described earlier in this strategy that Age UK Sheffield has had some success in its fundraising activities. Fundraising to deliver ILC services has been largely successful, with these appeals for major funding to continue. Income from local and some national trust funds also continue to be successfully secured. All this work is achieved from within the current staffing structure, and our experience is that employing dedicated fundraising staff for Age UK Sheffield does not significantly improve returns from sources of grant aid and charitable Trust funds.

There are three other main sources of fundraising income that have traditionally been employed successfully by local charities:

a) General community fundraising

This has proven challenging for Age UK Sheffield and other Age UKs who have put dedicated resources into these roles. National statistics show that fundraising for older people's charities lags far behind those for end of life care, medical conditions, children's charities and animal charities. This has been Age UK Sheffield's experience too. We have suffered from our case studies often not being as immediately heart-wrenching as other charities', and from not creating a compelling offer of a product to fund.

Even if such an appeal could be developed, it is not believed that, as an individual Brand Partner, a dedicated fundraising role would make a successful return on investment.

We will attempt to recruit volunteers and student fundraisers to undertake low-risk, easy-to-manage fundraising opportunities. As an example, we have agreed a three-year contract to be a charity partner of the Run For All Sheffield 10k race which takes place each April. We will also consider new sources of fundraising through, for example, crowdsourcing.

b) Corporate fundraising

Whilst we have occasionally been selected as a charity of the year by a small number of local businesses, our corporate fundraising attempts have suffered from the same difficulties as the community fundraising issues mentioned above. However, existing managers will seek to take advantage of any corporate partnership opportunities which may arise.

c) Legacy marketing

The receipt of legacies, or gifts in wills, is a major source of fundraising for many charities, including Age UK nationally. Age UK Sheffield has not traditionally been a major beneficiary of such legacies but some other Brand Partners are, and Age UK Sheffield has received some legacies in recent years. This is perhaps as a result of its increased work with older people living with complex health conditions, and also due to its success in helping older people to increase their income.

Age UK Sheffield will step up its work to take a proactive approach to making its customers aware of the positive impact legacies can have on the charity's future and its ability to help older people in Sheffield in the future. It will also raise awareness of the difference between Age UK Sheffield and Age UK, and our commitment to spending money received on older people in Sheffield.

Fundraising

In taking this proactive approach, Age UK Sheffield will take an ethical approach which is fully compliant with Charity Commission standards, and will also maintain its independence in service delivery.

d) New ways of fundraising

Noting the limitations of traditional forms of fundraising discussed above, and the probable need for Age UK Sheffield to increase funding from charitable donations, we will explore the potential for new ways of fundraising, using new technologies and communication methods. We will seek the advice of experts in this field and test ideas that are in line with our values.

13. New markets

In addition to the areas of work in which Age UK Sheffield have traditionally been involved, there are a wide range of other economic and social issues affecting older people in Sheffield that we believe we can positively affect. We will seek opportunities to help to address these issues, either through obtaining funding to develop suitable projects, or by developing our own business models. These include:

- Social care – there are thousands of older people with an unmet social care need in Sheffield. Lack of available social care is one of the primary reasons for delayed hospital discharges. However, Age UK Sheffield does not currently provide registered care. This is partly due to regulatory reasons, and partly because the market is poorly funded, as evidenced by regular media stories of poor care or failing providers. Age UK Sheffield recognises there is unmet need and a potential market to explore. Through this strategy it will consider options for a partnership with a regulated services provider, and for applying for its own registration to deliver regulated services.
- Home from hospital – many local Age UKs deliver a home from hospital service. We believe we could have a significant role to play in helping to get older patients discharged from hospital more promptly and, equally importantly, building their independence to reduce the chances of readmission. We will seek to develop opportunities to deliver on this.
- Trusted Assessor roles – increasingly, some NHS services are making use of “Trusted Assessor” roles to provide advocacy for patients, particularly around hospital discharge. Whilst there is a medical part of the assessment, there is a significant social element which Age UK Sheffield ILCs would be well-placed to deliver. They have been operating to a similar concept in the delivery of “OK to stay” plans as part of the Virtual Ward pilot. As a third sector provider, we can deliver the non-medical elements of many assessments in a highly cost-effective way.
- Employment – traditional schemes helping people into employment have been focused on young people. However, when people aged 50 or over lose their job, many find it very difficult to secure a new role. We believe we have the expertise to work with employers to make workplace adjustments for older people who have vast experience, and to help older people back into work after a spell unemployed.

Fundraising

Helping older people to remain in employment improves capacity for the commercial sector, reduces costs in unemployment benefits, and reduces the negative social and health effects of loneliness and mental health issues as a result of being unemployed.

- Property and accommodation – traditional provision of accommodation for older people has largely been restricted to individuals' own homes and residential care homes. Some supported living options are available but there are few innovative approaches which address common issues such as loneliness, living independently with long-term conditions, and the growing number of older single-occupants as a result of societal change. Being able to live in the right home is a fundamental part of living well in later life.
- Management and consultancy services – we believe that, for a voluntary sector organisation, we punch well above our weight in terms of our management capacity and ability to deliver on quality. We believe we have skills that can assist other third sector organisations and may explore opportunities to bring those to market.

Fundraising

14. Capital projects

This strategy has stated the importance of Age UK Sheffield having its own building in which to deliver services, as well as developing new sources of unrestricted funding.

One aim in this respect is to pursue an opportunity to acquire a long-term lease on The Old Coach House in Hillsborough Park from Sheffield City Council. This is a Grade II listed building which is currently in a state of disrepair, but which the Council would like to see brought back into public use.

We are committed to obtaining the capital funding to develop The Old Coach House into an older people's activity centre and a community café open to the general public. In spring 2018 we were bidding for small grants to enable us to carry out a Viability Appraisal, with a view to submitting a full capital bid to the Heritage Lottery Fund in the near future. We have identified potential sources of partnership funding and will seek to bring this project to fruition.

The project will take time to develop but it is believed that this development may fulfil our needs both for a centre in which to deliver activities and a source of income from the café which can contribute to the provision of our charitable activities.

15. Investment from reserves

The Age UK Sheffield reserves are, in 2017, in a reasonable but not excessive position. Around £450,000 is held in reserve and, although around than half of that sum represents our minimum reserves under our current policies, that does leave a small amount available for Trustees to designate for specific activities, should they choose to do so.

These reserves have benefited in recent years from a small but significant number of legacies and one-off donations. Whilst some charities view legacies as an essential part of their revenue funding which are to some extent predictable and planned for, this has not been the case at Age UK Sheffield and our future prospects in this respect are not known.

This strategy is a transformative one that will need some initial investment if, for example, the development of a retail operation or The Old Coach House projects, are to become a reality. However, at the same time, the funding pressures on Age UK Sheffield to continue to deliver its basic services are increasing significantly.

Due to our loss of Council funding, and the significant reduction of the Enterprises business, during the life of this strategy it may be required to designate legacy funding to support annual budgets. This is clearly sustainable only for a limited period of time.

Trustees will need to strike a balance between making sensible investments to develop long-term sources of income to support the sustainability of the charity, whilst at the same time ensuring day-to-day service delivery operations can be delivered.

Reducing costs

16. Reducing costs - current position

Against the backdrop of significantly reduced funding, which has been outlined elsewhere in this strategy, huge strides have been made to reducing the central costs of the organisation in recent years. Through a programme of staffing reductions and a premises move, over £300,000 per year has been saved with minimal impact on service delivery.

However, with a small number of exceptions, it is believed that this cost reduction programme has gone as far as is possible for Age UK Sheffield as a single organisation. Whilst all charities seek to provide as much funding for delivering services as possible, we all have basic costs which are essential to being managed well, fulfilling legal and governance responsibilities, and providing vital information to funders.

There are few further opportunities to reduce these costs, whilst retaining the level of service and standards we are satisfied with, but we would still like those costs to be lower as a proportion of our overall budget. The only way in which these central costs can be significantly reduced further would be by seeking an arrangement to combine these costs with another organisation.

17. Closer working arrangements

Major changes are taking place through the national Age UK network. Some local Age UKs are sadly disappearing due to lack of funding. Others are gaining strength through merging or collaborating. Whilst previous levels of local authority funding meant it was viable for a network of over 150 local Age UK organisations, the new funding environment does not support this model. There does not need to be 150 Age UK Chief Executives, finance departments, HR and data systems, or sets of policies and procedures. Some charity Trustees see collaborating as a sign of weakness or a loss of sovereignty. But a more positive outlook would see joint working arrangements as a way of protecting or enhancing the vital services we want to deliver to older people, by being able to allocate a higher proportion of our income directly to that charitable work.

Given that there is little further opportunity to reduce our central costs without lowering standards, we believe it is essential to develop some shared services or other type of joint-working arrangements with like-minded organisations, within the life of this strategy. This may be through a national or regional Age UK approach to the provision of some “back office” services. Or it may be an arrangement between a small number of local charities (either Age UKs or other Sheffield charities) that have mutually-beneficial aims.

Our long-term strategy therefore moves us from being an organisation that seeks to work in partnership with others primarily around the delivery of services, to one that is proactively seeking joint or closer-working arrangements with other organisations to build a stronger future for our ability to deliver services to older people in Sheffield.

In taking this approach we are not in any way seeking to dilute or abandon our absolute commitment to the older people in Sheffield who are living in poverty, in poor housing and in poor health. On the contrary, by strengthening ourselves, we can better secure our ability to support more of the older people who need us, for longer into the future.

Appendix A

Action plan

This document outlines a number of key strategic actions which aim to achieve our vision of a city in which no older person lives in poverty or loneliness. Some actions relate to the services we want to provide and how we want to deliver them; others relate to strengthening our organisation to be fit for the future to deliver our vision, through income generation activities or working in partnership to reduce our costs.

A summary of these strategic actions is below:

Information and Advice	Embedding our I&A service as one that is understood by policy makers to be strategically important to the city
Information and Advice	Continuing to seek opportunities to make our I&A services more accessible
ILC services	Promote a wider understanding of our ILC service, its offer, and how it is differentiated from other similar services
ILC services	To consider updating the ILC brand
ILC services	To encourage Commissioners to have high regard for quality and long-term costs of services, as well as initial price
ILC services	To approach potential funding sources to sustain our ILC services
At Home services	To be clear about the quality of our service, and to market it effectively
At Home services	To better understand how these may be commissioned through personal budgets
At Home services	To significantly grow our current offer
At Home services	To consider the risks and benefits of increasing the range of our service offer in the home, either individually or in partnership
Building-based services	To explore opportunities to provide day services in more local community settings across the city
Building-based services	To seek the use of local buildings in which to expand our range of services
Building-based services	To increase the amount of volunteer-led, higher-volume activities we provide
Widening our scope	To consider appropriate contract opportunities in Sheffield not related solely to older peoples' services, with the aim of strengthening our ability to deliver our core mission
Widening our scope	To consider appropriate contract opportunities outside of Sheffield, with the aim of strengthening our ability to deliver our core mission
Retail	Develop a business plan to consider opening retail outlets to provide an independent income stream
Legacy marketing	Take a proactive and ethical approach to generating future income from legacies
New markets	Consider opportunities to develop new markets for income generation, and develop business plans as appropriate
Capital funding	Continue to seek capital funding to enable us to take ownership of a service delivery centre
Reducing costs	Proactively seek out opportunities to work with like-minded organisations to share central costs

Appendix B

Vision, mission and values

Following internal consultation with staff, we are refreshing our vision, mission and values.

Our vision is: “For a city in which older people live independently, with choice and control over their lives, in the best health possible, free from poverty and loneliness.”

Our mission is: “To support older people in Sheffield by providing information, advice, advocacy and services which are recognised as a vital part of Sheffield’s infrastructure. We will work in partnership with local statutory and voluntary organisations to benefit, represent and champion the needs of older people in Sheffield.”

Our values are:

Trust

- We are honest, authentic, inclusive and accessible;
- We trust the customers we support and their voices;
- We are a trustworthy organisation, which is able to develop and lead;
- We trust each other to take responsibility, be accountable and responsive to change;

Care

- We care about our customers, their needs and wellbeing;
- We care about the quality of the services and support we offer;
- We care about being fair and considerate in the way we provide services;
- We care for our communities we serve and their needs;
- We care about our reputation for achieving the best results and outcomes for older people.

Choice

- We aim to empower older people to make choices about their lives;
- We practice and promote equal opportunity and diversity;
- We aim to support staff and volunteers to grow and achieve their potential;
- We will embrace new ideas and positive and safe risk taking.