



# 3 Year Strategic Plan

April 2023 - March 2026



# Our Vision

Our vision is a county where older people can live well and make the most of later life



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# Our Charity

We are Age UK Surrey, a local registered charity, and a company limited by guarantee. We were originally founded in 1947, as the Surrey Old People's Welfare Association, and were later renamed as Age Concern Surrey in 1980. In 2016, we became a brand partner of Age UK, the national charity, and changed our name to Age UK Surrey.

With annual expenditure of circa £1.5m, we are a mid-sized independent charity, with the majority of our funds sourced from local authority grants, charitable trusts, donations and legacies. We also generate income from the provision of Help at Home, Independent Care Advice, Lasting Power of Attorney paid-for services, and more recently from our Vintage local charity shop retail activity.

Our financial aim over the plan period is to sustainably grow income to achieve an on-going breakeven operation.

The national Age UK charity provides valuable brand support in attracting older people to both the national and local partner provided services. It also supports its brand partners with national research & campaign activity, advice brochures, website referrals, system development and project funding.

Our primary stakeholders are:

- older people themselves, their families and carers;
- statutory authorities: NHS, Surrey County Council, and the eleven borough and district councils;
- other local charities and organisations working with older people and other client groups in Surrey;
- grant-making trusts;
- our supporters and donors.

We also collaborate with a number of local charities across Surrey with similar aims.





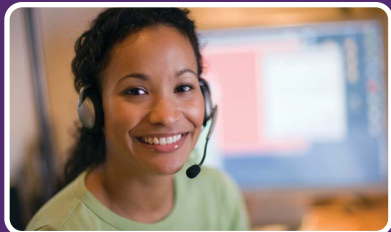
**"Volunteering**  
has been an immensely  
rewarding experience,  
particularly against the  
back-drop of the pandemic,  
when feelings of  
**isolation & loneliness**  
have touched us all"

Gus, Check in  
and Chat volunteer

# Our People

People are at the heart of our organisation. We are proud of our dedicated staff and hundreds of volunteers who make such a difference to the lives of the older people we support.

# Our Surrey Wide Activities and Services



## **Information and Advice:**

Provides telephone and outreach services to help with benefits, housing and social care.



## **Check-in and Chat:**

Provides telephone based befriending service to combat social isolation and loneliness.



## **Go-50 Walking:**

Provides guided country walks across Surrey.



## **Help at Home:**

Offers a range of domestic services, such as cleaning, laundry, shopping, gardening.



## **Lasting Power of Attorney:**

Provides assistance with the application and registering process.



## **Independent Care Advice:**

Offers solutions in local care provision at home and in residential care placement (by referrals to either Careseekers or Grace Consulting dependent on support needs).





### **Telephone Tech Support:**

Provides help on how to use mobile phones, tablets and computers.

(Services and Activities correct as at 1st January 2023)

# Our Location Specific Activities and Services



## **Befriending:**

Offers face-to-face companionship in Runnymede, Spelthorne, Guildford and Waverley.



## **Hospital Activities:**

Provided at Farnham Hospital to improve patient wellbeing.



## **Café Culture, Tea and Chat:**

Offers facilitated social get togethers in community spaces.



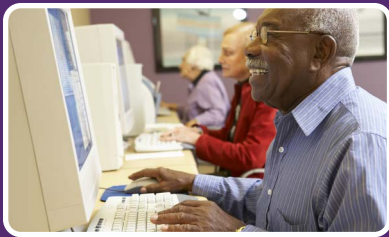
## **Men in Sheds:**

Offers a space in Merrist Wood College where men can connect, make friends and learn carpentry skills.



## **Shopmobility:**

Funded by Guildford Borough Council, we hire mobility scooters and powered wheelchairs.



## **Tech Support:**

Drop-in help in Guildford and Milford on how to use mobiles, tablets and computers

(Services and Activities correct as at 1st January 2023)





**"Quite look forward to coming on a Tuesday afternoon, to meet the guys, to have a sit and a chat - and to actually meet somebody. Because when you're retired and an old age pensioner, as we probably all are, I am anyway; you don't meet many people in the course of the day."**

Men in Sheds Client



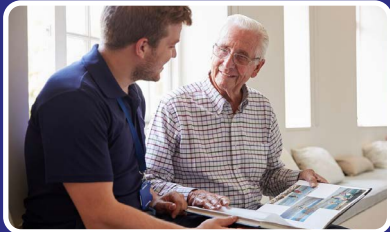


**“I enjoy it so much that nowadays I make no appointments on a Tuesday. I was living in a place I didn’t know and that’s how I made friends because they invited me, and said: ‘Come on, we’re going for a cup of coffee’. And then I got asked: ‘Come and meet us on Saturday, ’re doing this and this’, so that’s where my life has literally mushroomed...”**

**Social Activity Client**

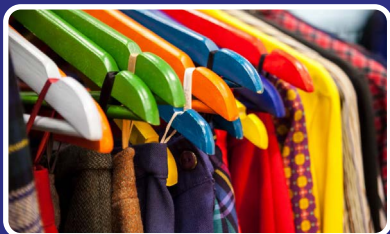


# More Location Specific Activities and Services



## My Life, My Story:

People's stories are captured by volunteers and a booklet created, providing a celebration and legacy of their life to share with family and carers.



## Vintage Shops:

Charity retail shops provide opportunities for people to volunteer and donate in Esher, Haslemere, and Lingfield.



## Clockhouse Community Centre in Milford:

Provides a community space for everyone.



- 10 to 3 Club, a day service for older people, including lunch.
- Pause for Thought, a dementia therapy support programme.
- Butterfly Café for people with dementia and their carers.



- Hairdressing, Footcare, Beautician services Tech Support, Community Choir, Bridge and Bingo and many more activities.
- Clockhouse Café provides refreshments, homemade lunches, snacks and cake.
- Rooms for hire.

(Services and Activities correct as at 1st January 2023)

# Our Impact

**Providing Information and Advice**

**Maintaining Independence**

**Combatting Loneliness and Social Isolation**

**Improving Health and Wellbeing**

**It's people who make it all happen**

(Figures as at 31st March 2022)





**3265**  
clients helped



**7617**  
enquiries handled  
of which:  
48% Health/Care  
31% Benefits



**£2.2m**  
additional  
benefits



**1740**  
clients with  
Home Help



**448**  
clients with  
Garden Help



**194**  
Shopmobility  
clients



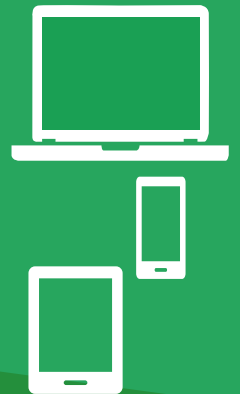
**182**  
Befriending  
in-person  
clients

**240**  
Check in and  
Chat clients



**260**  
Hospital  
Activities  
clients

**82**  
Tech  
Support  
clients



**100**  
Community  
Centre  
clients



**36**  
Social  
Group  
clients



**448**  
Men in Sheds  
clients

**220**  
GO-50  
clients



**511**  
Volunteers



**58**  
(43.9 FTE)  
Paid  
Staff

**7**  
Trustees



# The National Picture

Provision of clear information and advice is essential to help older people to retain independence. We support people to increase their income and help them navigate the care system because:

**16%**

are classed as living in poverty, with

**£4bn**

in pension, housing benefits not claimed nationally.

**30%**

of older people get little or no help with care needs.

**7%**

materially deprived (due to financial, health or social isolation barriers).

**21%**

receive local authority support with care needs.

**care**

needs vary from domestic help to 24 hour assistance.

Loneliness, social isolation and living alone are linked with increased risk of poor health, injury, dementia and premature death:

**49%**

of older people say TV, pets are main company.

**9%**

feel cut-off from society.

**40%**

are impacted by digital exclusion.

(Sourced from Age UK's national study , 'Later Life in the United Kingdom 2019')





**Physical Health and Mental Wellbeing are interconnected, and shown to impact positively on older people's quality of life. We help people to be active because:**

**150**

minutes physical activity per week promotes good health.

Physical inactivity declines sharply for the over

**75's**

Depression is the

**most**

common mental health condition.

"We're quite a close knit group here, if someone's ill there's always someone who'll pop in and check everything's alright. We give them a hand if they need it. It would be disastrous, I think, if it closed. I mean not just for us; but for other people here. I look forward to it every week."

Social Activity Client

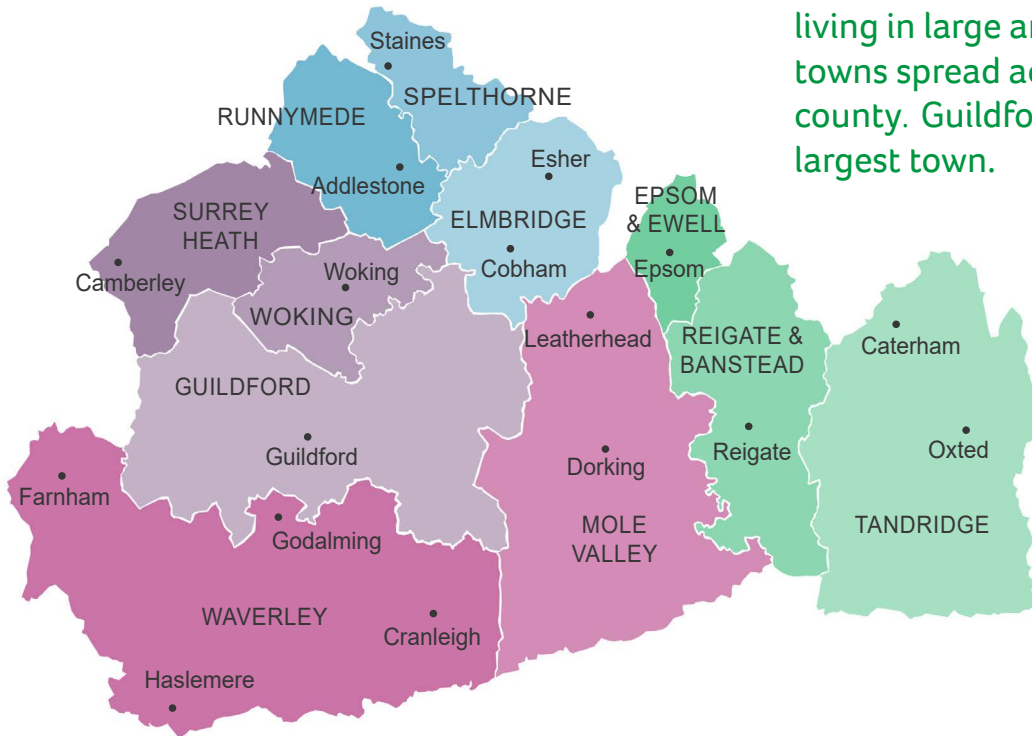
# Our Local Community

Surrey is the most urbanised shire county in England.

Most of the population

# 87%

living in large and small towns spread across the county. Guildford is the largest town.



**Population:** 1,200k (2.4 per household)  
**Over 65's:** 230k (19.2% of population, with 85+ growing fastest)  
**Non-UK Born :** 15.3% (vs 15.2% in England & Wales)

The county's top performing economy and proximity to London, makes it a desirable place to live.

Despite this, it has pockets of deprivation in certain parts of Guildford, Woking, Elmbridge, Reigate & Banstead, Spelthorne and Tandridge.

Surrey has an ageing population with 229,900

# 19%

currently aged 65 and over.

Of those who live in their own home,

# 31%

live alone, potentially leading to social isolation.

More than half **54%** do not get sufficient levels of exercise, and an estimated 16,400 have Dementia

# 1 in 4

(Demographic data sourced from ONS, Nomis, Surrey CC, CFS)

# Our Operating Environment

Demand for Age UK Surrey services are also influenced by rapidly changing external factors over time:



## Government Policy

- Pension reform (lower state support, retirement age increases)
- Social and Welfare reform (Affordable Care, Universal Credit)
- Local council funding constraints
- Immigration management.



## Economic

- Shortage in suitable and/ or affordable housing
- Competitive job market
- Cost of living / energy costs
- Increased debt from interest rate changes
- Poor public transport links across Surrey



## Social

- Ageing population strain on NHS / Social Care
- Increased incidence of mental illness / loneliness
- Increased incidence of reported discrimination
- Broadening range of competing charitable / volunteer services



## Technology

- Increased digitization of services
- Increased customer service expectation



## Legislative

- Increased consumer and data protection rights



## Environmental

- Climate change and pandemic related issues
- Fall out from the Ukraine War crisis



# Our Strategic Plan

## OUR AIMS

## AND OUR OBJECTIVES

1



**We will put  
older people  
at the heart of  
everything  
we do**

- Develop an effective pathway through the organisation, to ensure people only tell their story once.
- Ensure older people have access to our range of services.
- Listen to and act on feedback.
- Provide a voice for older people and campaign on their behalf.
- Recognise diversity and understand different peoples' needs.

2



**We will extend  
our reach to  
connect with  
more older  
people and  
professionals**

- develop partnerships with other complementary organisations.
- deliver some services in partnership with others.
- market our services using all available methods.
- encourage older people to recommend our services to others.
- Ensure all staff and volunteers take every opportunity to promote the charity.

3



**We will further develop community support to improve older peoples' well-being**

- Develop our community centre to become a thriving hub providing activities to suit differing needs.
- Expand services to people living with dementia.
- Develop intergenerational activities.
- Ensure our shops are important hubs in their local communities.
- Develop a range of activities across the county to connect people to each other.

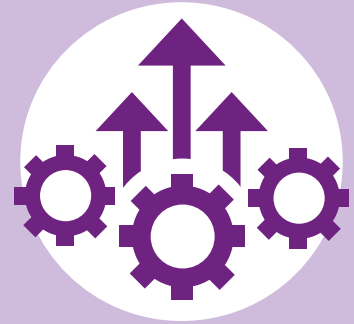
4



**We will further develop services to keep people independent at home for as long as possible**

- Support frailer older people at home.
- Strive to reach more people through Help at Home.
- Develop our activities to support those who are lonely.
- Provide information and advice at home.
- Provide support to family and carers.

5



**We will strive for operational excellence and financial sustainability**

- Ensure we meet our required quality standards
- Optimise our digital working
- Ensure financial sustainability
- Develop our committed and well trained team of staff and volunteers
- Be able to demonstrate the impact of our services



“One day I will be  
that person who is  
**fragile & vulnerable**  
and who needs to  
spend time with someone who  
**truly cares**”

Sally, Farnham Hospital Patient  
Activities Volunteer Leader

Our values help support our  
**staff and volunteers**  
in the delivery of our plan aims.



# Our Values

## We Respect Everyone

- We will always act with honesty and integrity, are open, fair and seek to develop trusting relationships.
- We will ensure we are aware of others' needs, ensuring their dignity and privacy at all times.

## We Work Collaboratively

- We collaborate to achieve better results and share best practice.
- We listen to others, do not make assumptions and seek to communicate clearly.

## We Have a Can Do Approach

- We are motivated, committed to everything we do and flexible in seeking solutions to problems.
- We are confident and realistic about what is achievable

# Our Work Inspires

**Age UK Surrey are experts in providing information and advice on a wide range of issues relating to older people and help hundreds of people every year to access benefit entitlements.**

We were contacted John over twelve years ago when he needed some advice for his 86-year-old mother. He visited the office several times to pick up leaflets and arranged to speak to an Advisor. He said he “received some very useful help from Age UK Surrey”.

**“I am hugely indebted to Age UK Surrey as without their help I would have struggled with the needs for my mother and brother”**

John made contact again about help for his brother who was living with dementia and prostate cancer. John said ‘I was aware of Attendance Allowance, but I had difficulty getting the forms. Your Advisor Kate organised for them to be sent to me. She went through everything with me on the telephone as it was during Covid, and I couldn’t visit the office’. Thanks to Kate’s help, John’s brother was awarded Attendance Allowance at the higher rate which he said, “was important as it made a big difference”. “The extra money helps to pay for the carers as his pension is not enough to cover his outgoings”.



**Age UK Surrey’s Help at Home Service provides friendly, reliable Home Helps and Gardeners when an older person needs help with a variety of tasks including cleaning, gardening, shopping, laundry, and light meal preparation.**

June, a Help at Home client who is registered blind, contacted us to express how grateful she is for everything that her Home Help, Lisa has done for her.

**“With Lisa you get much more than mopping, shopping, and vacuuming”**

Since losing her guide dog, coping with various health conditions, and losing support from the specialist housing for the blind, Lisa has helped her client to get to appointments, assisted getting a new washing machine, and even found her a reliable plumber. Throughout the Covid pandemic, when home visits weren’t possible, Lisa regularly shopped for June on a volunteer basis. June refers to her Home Help as a ‘personal treasure’ who helps her with whatever needs doing in the home.





"I have been using the Guildford Shopmobility service for around 3 or 4 years now. After the initial try, I immediately signed up for annual membership and

**I have not looked back since!**

I would thoroughly recommend Guildford Shopmobility. Whether it's just to enjoy cruising around Guildford without the effort of having to walk and deal with the town's hilly terrain - or like me, you have real mobility issues!!

Anil, Shopmobility client



**“ Together we have achieved so much over the last 3 years and in difficult times, helping people to stay connected and active and increasing people’s income where it is most needed. I am optimistic for the next 3 years and how we continue to serve and respond to the needs of the growing older population in Surrey. ”**

**Sue Zirps, Chief Executive Officer**

**We rely on donations to support our local services. If you would like to get involved by volunteering, fundraising or supporting an event, we would love to hear from you.**

**For more information please call:**

**01483 503414**

**Or visit our website at:**

**[www.ageuk.org.uk/surrey](http://www.ageuk.org.uk/surrey)**

**Keep in touch and follow our news on social media:**



**@AgeUKSurrey**

## **Age UK Surrey**

**The Clockhouse Community Centre  
Chapel Lane, Milford, Surrey, GU8 5EZ  
Tel: 01483 503414 | Text: 07593 139560  
Email: [enquiries@ageuksurrey.org.uk](mailto:enquiries@ageuksurrey.org.uk)**

**Registered Charity Number: 1036450**

