



3 Year Strategic Plan 2025-2028

Foreword by Joy Allen, Chair



I am pleased to share our new Strategic Plan for 2025-28 with you. The Board of Age UK Surrey, our new CEO and our staff team, have all contributed to this document.

People are at the heart of everything we do and we have listened to their wishes. Of course, we would always like to do more but, in the new and challenging charity landscape and with the pending local government reorganisation, I think we have achieved a strategy which will enable us to move forward confidently.

We are fortunate to have such dedicated and enthusiastic staff, volunteers and partners who will be working hard to deliver our plan and I would like to thank every one of them for the work they do.

I look forward to an exciting future!

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Welcome from Catherine Hodgson, Chief Executive



It's an honour to lead our charity which is completely focused on improving and enhancing the lives of older people in Surrey. We want older people to age well – to maintain their independence and experience a quality of life which is as good as it can possibly be.

Many of the older people we support are facing significant challenges. Surrey has an ageing population, areas of deprivation, gaps in dementia support for those diagnosed and their families, high levels of loneliness and isolation and an increasing need for support for falls prevention and frailty.

We are determined to reach more older people and their families and ensure they know that we are here to support them, whatever the need, in the heart of their local communities.

Scope of Strategy

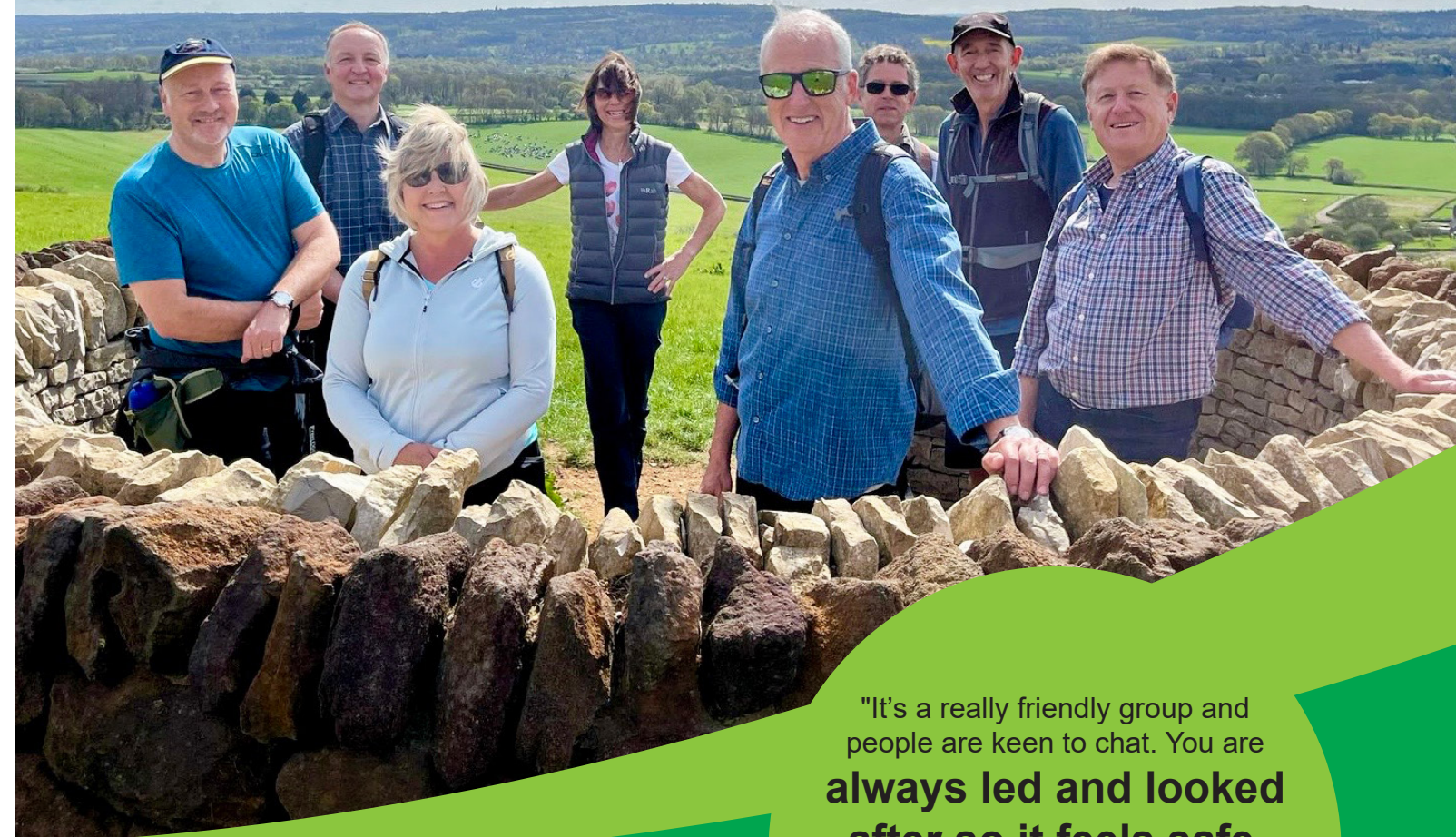
Our Strategic Plan 2025-28 sets out our aims and priorities for Age UK Surrey during the next three years. It has been informed by input from colleagues right across our team and by our Board.

It is framed against a challenging period for the non profit sector which has seen a rise in demand for services, significant funding pressures, governmental policy changes, changes in NHS governance and the restructuring of local government.

At the centre of this strategic plan is our intention to maintain and deliver our core services whilst moving our charity forward in an ambitious and achievable way, mindful of the needs of our clients, our return on investment and our capacity.

Our Vision

A county where older people can live well and make the most of later life.



"It's a really friendly group and people are keen to chat. You are **always led and looked after so it feels safe.** For me, it's just the right balance between not overdoing it but getting some good exercise, fresh air, and company.

Chris, Go50 Walk client

Our Values

We are compassionate, creative and collaborative.

This Strategic Plan is underpinned by our values which are fundamental to who we are, how we deliver our services and care for our clients, and how we interact with our networks, contacts, supporters and funders. Our values are part of the way in which we hold ourselves and our work to account.





"Thank you for the advice we have had through one of your advisers, Laura. She is **professional, warm and compassionate** which, in our situation gives us **encouragement and hope**"

Anonymous, I&A Client

Who We Are

We are Age UK Surrey

We were formerly known as Age Concern Surrey and joined the Age UK Network in 2016. We are a proudly independent and expert organisation with a strong reputation for providing vital support to older people, and their families, right across Surrey,

We have an experienced staff team of more than 50 and an active volunteer team of 360, out of a total of more than 450 currently registered, and a strong local presence across Surrey. We presently lease and own buildings in Milford, Godalming, Caterham and Ash and we run a range of events and activities from our Clockhouse Community Centre.

Since 2022 we have operated a portfolio of three retail shops in Haslemere, Lingfield and Esher which enable us to engage with local communities, fundraise and provide volunteering opportunities for local people.

The majority of our income is raised from grants, legacies and contracts with Surrey County Council. The balance of income is generated through our Clockhouse Community Centre and the dementia support, activities, and classes it provides; trading activities; donations; community fundraising and investments. To ensure our sustainability, we must diversify the sources of our income.

"Guildford Shopmobility has been
**a lifeline to
my husband and I.**

The staff are so
**friendly, helpful and
extremely approachable.**

Without this service my husband and I
would not only lose our independence and
would have to rely heavily on others"

Joanne, Shopmobility client

Our County

Surrey is bordered by West Sussex, East Sussex, Kent, Hertfordshire, Berkshire, Hampshire and Greater London with its county town of Guildford located in the far west. The county is segmented by a number of major routes including the M25, the A3 and the A22. Major towns include Dorking, Esher, Farnham, Godalming, Haslemere, Leatherhead, Lingfield, Oxted, Staines-upon-Thames, Walton-on-Thames, Weybridge and Woking.

At the time of drafting, there are currently two Integrated Care Boards (ICBs) within the county – NHS Surrey Heartlands and NHS Frimley in the North West with four place-based partnerships within Surrey Heartlands Integrated Care System and five within Frimley Health and Care Integrated Care System (ICS).

All four of the place-based partnerships (the interface between the NHS and the VCSE sector) in Surrey Heartlands ICS sit within Surrey county boundaries. Three of the five place-based partnerships in Frimley Health and Care ICS overlap with Surrey county boundaries. This provides a somewhat complicated picture for local people seeking to navigate the NHS

services, and for Age UK Surrey, as the NHS system is poised to change once again. It is likely that NHS Surrey Heartlands ICB will merger with NHS Sussex ICB (north/south) alongside the reorganisation of Surrey's local government which is forecast be on an east/west arrangement. This will doubtless present a range of opportunities and challenges for Age UK Surrey.

There are approximately 227,000 people aged over 65 residing in Surrey. This number is accompanied by large increases in our oldest populations. Those in the 70-74 age group have increased by 34%, in the 75-79 by 18% and in the 80+ age group by 14.5%¹.

The number of registered cases of people diagnosed with dementia aged 65 and over in Surrey is 11,791 (as of January 2025)² and this is set to rise. Surrey County Council estimates there will be 23,000 people with a diagnosis of dementia in the county by 2030. Surrey and Sussex NHS Healthcare Trust report that between 12% and 25% of acute hospital beds are occupied by people with dementia at any one time.

There are clear gaps in current dementia support across Surrey with East Surrey, Woking and Guildford less well served. Surrey Dementia Strategy Action Board has identified approximately 2,000 people with cognitive impairment within the current Guildford and Waverley Borough Council areas alone. The Royal Surrey Hospital's current referral level is 70 people per day - on average. NHS Surrey Heartlands ICB has identified 1,500 people who are living an unacceptable travelling distance from dementia day care – this figure does not include data from NHS Frimley ICB.

There are estimated to be 28,700 carers in Surrey aged 65 and over – many of whom are themselves experiencing challenges with their own physical and/or mental health.

In the UK it is estimated that 2.1m (18%) older people are living in poverty³. This is defined as not having enough resources to meet basic needs. Surrey Community Foundation has particularly highlighted Surrey's 'hidden side' and 'pockets of deprivation' in what is usually assumed to be a county of affluence.

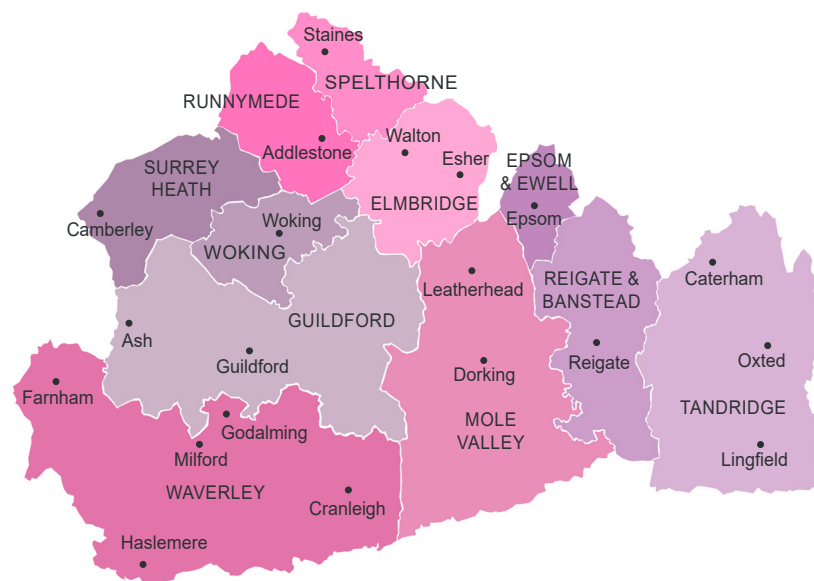
Spelthorne, Runnymede, Tandridge and Woking are identified as having the highest levels of household deprivation in the county. Guildford's areas of Bellfield, Slyfield, Park Barn and Royal Surrey have significant deprivation and health inequalities. Other areas include Leatherhead North, and areas of Reigate and Banstead, Epsom and Ewell and Surrey Heath.

There are currently 34 foodbanks in Surrey with the Trussell Trust reporting a 227% increase in usage between 2013 and 2023. Benefit related issues and low incomes are the main reasons why local residents access foodbanks.

Of the 227,000 older people aged 65 and over in Surrey, 13.1% live alone – and this number is also expected to rise. Waverley has the highest number of lone-person households over 65, with over 7,000 households, closely followed by Elmbridge and Reigate & Banstead⁴. The proportion of older people experiencing loneliness is at least 47% and rises to 76% (when older people were asked a direct question about whether they felt lonely)⁵.

In the UK 30-40% of older adults fall each year and more than 10% of ambulance callouts are due to falls⁶. Falls are associated with faster functional decline and frailty progression. Between 30% and 50% of falls result in bodily injury, and fractures occur in about 3% of cases⁷. Older adults with dementia are also at a higher risk of falling while findings have also suggested that falls could be a marker in behavioural changes⁸. The impact of falls can lead to an increased fear of falling, distress, delayed functional recovery and increased length of hospital stays.

The financial burden of falls on the NHS is estimated at £2billion with significant impacts on Surrey's own economy and health system with every ambulance callout costing just less than £250 each, and every in-patient day stay costing more than £1,100.



¹ UK Census 2021

² NHS England

³ Poverty in Later Life – Age UK, 2022

⁴ Community Foundation for Surrey

⁵ All the Lonely People: Loneliness in Older People – Age UK

⁶ Age UK 2025

^{7,8} Oyenehin B, Beech H, Marshall A, et al. Falls prevention in an older adult mental health ward through a quality improvement initiative. BMJ Open Quality 2024.

Our Services

Our services include a wide range of activities, services, support, advice and information for older people and their families which we constantly seek to develop in response to need.

We aim to continue our core and current services with an ambition to fill identified gaps in delivery within Surrey and seek opportunities to raise income.



Information and Advice

One of our core services providing free and confidential advice on welfare benefits, housing needs, carers' support and care at home. Our I&A Team includes our frontline Triage Team who field calls and enquiries from the public, our Lasting Power of Attorney (LPA) Service and our award winning Planning for your Future Team, who deliver essential information seminars across the county.



Help at Home

Our team of Help at Home Coordinators recruit carefully selected home helps who they match with our clients to assist with light domestic duties and provide companionship. The Team also includes a successful gardening service.



Telephone Befriending

We provide companionship across the county for older people experiencing loneliness and isolation.



Cafe Culture, Tea and Chat

We facilitate social get togethers in community spaces.



Go50 Walks

Our Go50 Walks are a very important part of our calendar of activities – bringing together groups of older people to walk through our beautiful Surrey countryside and make new friends.



Men in Sheds

In collaboration with Merrist Wood College near Woking we provide a fully equipped workshop space where men can connect, make friends and learn carpentry skills.



Shopmobility

Based in the centre of Guildford our Shopmobility Team hire a fleet of mobility scooters and powered wheelchairs enabling clients to shop and spend time with family and friends.



Tech Support

An essential drop-in service, delivered by volunteers in Guildford and Milford, providing hardware/software and social media support. The service plays an important role in our commitment to reducing digital exclusion experienced by older people and removing barriers to utilising tech in everyday life.



Retail Shops

We operate three charity retail shops in different parts of the county - providing opportunities for local people to volunteer and donate in Esher, Haslemere, and Lingfield. Our shops provide opportunities for volunteering, fundraising and important community engagement.



Clockhouse Community Centre

An important and much loved community space, as well as a working space for our hybrid team members. Services include a successful 10-3 Club, dementia care as well as a range of activities, services and classes to improve mental health and wellbeing, and alleviate loneliness.



Dementia Support Services

We provide a dementia support group near Camberley with active plans to extend services to Ash in West Surrey, within our Clockhouse Community Centre, to West Horsley and to other locations across the county where we have identified gaps.

Our Service Teams are supported by our Income, Marketing and Partnerships Team and also by our Resources Team comprising our HR, Salesforce and Compliance colleagues.

Our Operating Environment

The charity sector experienced another challenging year during 2024/25 and this is forecast to continue during 2025/26. The ongoing cost of living crisis, severe inflationary pressures and budgetary changes, including the increase in Employers' National Insurance contributions, have all created a difficult landscape. As of November 2024, 921 charities closed during the year - including several members of the Age UK Network.

Funding cuts in the statutory sector are having a significant impact on charities and their service delivery with core and unrestricted funding more difficult to secure - central government funding decreased by 33% from 2022 to 2023, local authority funding has dropped by 23% since 2009-2010.

Surrey is fast tracked for significant changes to its local government structure within the period 2026-27 although, at the time of writing, the precise nature of the proposed structure is unclear but it is likely that the current configuration will be divided into two or three areas. It will be necessary for Age UK Surrey to navigate our way through the changes whilst maintaining a level of statutory funding. Additionally, there are pending changes to the NHS

system with a possible cross county merger between NHS Sussex ICB and NHS Surrey Heartlands ICB. This may pose further commissioning challenges but may also present possibilities for collaboration and partnership with Sussex based charities.

We continue to maintain strong relationships across the non profit sector in Surrey, including the VCSE (Voluntary, Community and Social Enterprise) Alliance, for which we are the Lead for the Older People Portfolio and also contribute our expertise to NHS Surrey Heartlands ICB's Frailty Pathway as Lead for Frailty.

There is increased competition from more charities for available awards from trust and foundations, grant applications have surged by a reported 30-50%. Several grant givers have temporarily suspended their grant giving or are in the process of winding down their operations. However, UK donors gave £13.9 billion to charity last year, up from £12.7 billion in 2022. The £1.2 billion increase was driven by fewer – usually older - donors giving larger amounts, rather than by more people giving. These larger donations pushed the average monthly donation in the UK to £65, up 40% from before the pandemic.



"It really has
been a joy for me
to take part in the Big Knit
Campaign and knit the little hats
for you. It's my first time making
them, and
**I very much hope
to take part again"**

Susan, Big Knit contributor

We are very fortunate to benefit from the generosity of supporters who remember us in their wills and are hugely thankful for their kind generosity. It is such an honour to know the help, support and care we provided has been marked in such a significant way – enabling us to continue to reach older people and their families who need us.

We will seek to diversify our income streams and develop further income from corporate partnerships and paid for/commercial services.



"At the Clockhouse, we get the feeling we can relax when we walk through the door. There's a

sense of belonging

which is important. People need to know that instead of sitting alone on their own at home, they can come here, take part in the activities, and just enjoy a bit of time being sociable and not being insular, those are the things that are really important.

I'd be lost without it

I just don't know what I'd do!"

Sandra, Clockhouse client and volunteer

Our Aim for 2025 - 2028

We recognise that there are a number of barriers to good health and independence for older people in our county such as poverty (including fuel poverty and the challenges caused during winter), unclaimed benefits, health inequalities prevalent in areas of the county, loneliness and isolation, dementia, the high costs of care (both domiciliary and residential) and housing costs, particularly for rental properties, and digital exclusion which impacts on so many aspects of life.

We want to be the leading provider of support services and advice to older people across Surrey.

We have already taken some important steps:



We have restructured parts of our operational team to increase its effectiveness and strengthen its reporting lines.



We have commenced with extending our Dementia Support Services beyond our Clockhouse Community Centre with plans to provide support in multiple locations.



We have taken a lead role in the local NHS system's focus on frailty.



We are strengthening our relationships with other charities and seeking opportunities for collaboration and partnership.



We have maintained our local government commissioned contracts.

To achieve our overarching aim during 2025-2028 we plan to:



1. Strengthen our reputation as an expert organisation and our ability to demonstrate our impact.

It's essential to show what we do works and contributes measurable social value across Surrey as well as helping us to secure the funding we need to resource our activities. We want to improve how we evaluate our services and measure our impact.

We will:

- **Develop our relationships with universities** both in the South East and nationally;
- **Commission research** to support our service delivery;
- **Ensure high level evaluation of our services** and the benefit we provide to Surrey's health and social care economy.

"I have
**nothing but the
highest praise**
for the Help at Home service
I got from Age UK Surrey.
It was fantastic and I don't know
what I would have done without
them to be honest - it was
absolutely brilliant!"

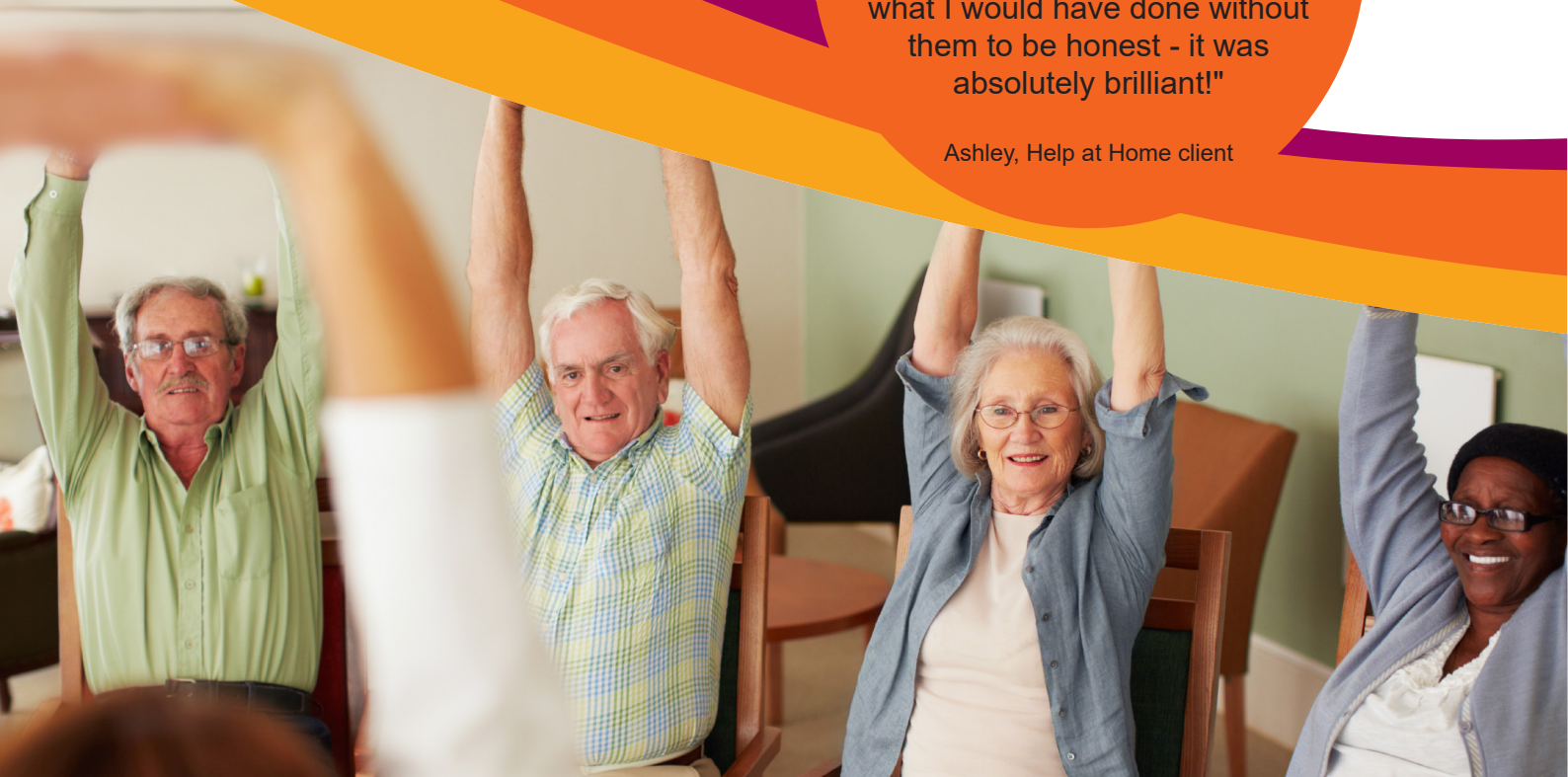
Ashley, Help at Home client

2. Extend our services and increase our reach across Surrey.

We want to be a truly 'across' Surrey organisation – with strong recognition of our name and work, and engagement with our services. We want to maintain and develop our core services whilst extending our Dementia Support Services; focusing on falls prevention and frailty; loneliness and isolation; and our support for older men.

We will:

- **Develop new, paid for services/consultancy** throughout 2025-28 which can be marketed to older people and professionals - supported by a targeted marketing strategy.
- **Promote our Clockhouse Community Centre** as a centre of excellence in providing general and specialist support services for older people and utilise the commercial potential of its space.
- **Extend our portfolio** of Help at Home and Gardening Services.
- **Continue to grow our Information and Advice Service** with a focus on outreach – recruiting and training a full team to meet client demand with access to training and resources of the highest quality.
- **Grow and develop our charitable and paid for dementia support services** across Surrey – with a focus on East Surrey, Woking and Guildford to close gaps in service delivery.
- **Ensure that our service is inclusive and compassionate** and is rooted in fairness and equity of access for every older person in Surrey who needs us.
- **Secure NHS/local government commissioning** for new or existing services both as a sole provider and in collaboration with other organisations.
- **Continue to improve and refine our operational structure** and processes to meet the changes of the local government and NHS system reorganisations.



3. Support and develop our staff and volunteer team.

We will ensure that all colleagues benefit from a culture of respect and compassion and a healthy work/life balance in a positive environment.

We will:

- **Offer and promote learning and development opportunities** to foster a culture of continuous learning for our team and enhance the quality of our services.
- **Demonstrate opportunities to progress** within our organisation by promoting from within wherever possible.
- **Encourage and facilitate collaboration** across all our teams – a 'One Team' approach.
- **Continue to provide a number of enriching opportunities** for our volunteer team to contribute their time, skills and experience with a focus on multi generational volunteering and long term retention.



4. Strengthen our financial resilience.

We want to ensure the continuation of our current services and the viability of our plans. We recognise that we must continue to diversify and look at new ways of raising income.

We will:

- **Continue to develop long-term strategic relationships** with our trusts and foundation partners and develop new relationships to deliver growth and core funding.
- **Develop toolkits for corporates/intergenerational/younger groups** to inspire and motivate them to raise money directly with the minimum of team intervention and being mindful of our return on investment (ROI).
- **Introduce regional/national challenge events** and focus on their promotional and corporate engagement potential.
- **Develop mutually beneficial corporate partnerships** aligning with our expertise in supporting older people and their families - providing Help at Home, Dementia Support, Information and Advice, and Planning for Your Future delivery for employees/staff teams.
- **Ensure our relationships with our supporters are effectively stewarded** from first contact to receiving a gift/donation - donors want to better understand the investment they have made and the impact it makes. Loyalty, retention, mid-value giving and engagement with a younger demographic and the older 65+ age group will be key drivers.
- Ensure supporters, volunteers, staff and clients understand, through training/ effective communications, **the importance of 'Surrey'** when donating/ bequeathing gifts.
- **Continue membership of the Octopus Legacy Programme** to ensure that potential legators know about our work and how to make us a gift.
- Steward legators effectively to ensure an **understanding of the difference their future gift will make to AUKS** and have opportunities to make additional gifts while they are still living.
- **Grow income from in-memoriam gifts and proactively engage with solicitors** to promote AUKS as a choice for these valuable donations.



"After losing my husband I often feel quite low but when Diana calls for a chat, we have a laugh, and **she cheers me up.** I don't always find other people so easy to chat to, but Diana is very kind"

Moira, Check in and Chat client





"Even if you can only spend an hour a week, that hour makes the difference to a client. You may be **the only person they see** that week that has the time to spend with them. You can learn so much from older people. One hour will make **so much difference** to someone who is lonely"

Kate, Befriending Volunteer

4. Strengthen our financial resilience. (contd)



We will:

- Develop an overarching case for support and one for each major service.
- Develop a **new Marketing and Communications Strategy** for 2025-8.
- Ensure **close collaboration between Income Generation, Marketing and Partnerships, and Service** – to ensure a mutual understanding of what we are working to deliver.
- **Recruit an Income Generation Trustee** to join our Board to assist us with income diversification.
- **Work closely with our Board**, their skills, ideas and networks, to collaborate on our plans to develop strategic corporate partnerships and explore their links to high-net-worth individuals who want to support our work.
- **Recruit additional patrons** with strong networks across Surrey.
- Recruit a team of '**Community Engagement Volunteers/ Ambassadors**', to assist us with our income generation and promote our work - to schools, businesses and potential corporate partners.
- **Develop our social media engagement** and presence to include clearer messaging about what we do.
- Ensure our **website** makes giving to us as easy as possible and showcases our work – with a giving menu, and video of our clients and their families.
- **Introduce an initial Major Donor Programme** accompanied by effective stewardship.
- **Keep pace with innovations in AI** - to improve our identification of potential donors and provide data on supporter motivations.
- **Review our digital fundraising** - to increase the number of individual mid value donors, improve the data/intelligence on our current donors and grow awareness of our work.
- Share an Annual Donor and Supporter Survey to learn about our supporters' values and motivations.



"I'm 89 and my husband's 96 and I was needing some help with cleaning the house. My daughters weren't keen on me answering just an ordinary advert as you don't know who you're going to get so I called the Age UK Surrey office as I saw an advert in a booklet about the Help at Home service".

"We had a lovely man called Will from the Help at Home office ring me and said he had found someone. He brought her round to meet us and was very thorough about what he said about the service. Our Home Help started within a few days, and she comes to us on a Wednesday. It looks like a palace when she's been - she's lovely!"

"When she comes round, she sits and talks for a while and then she starts cleaning through the house with the Hoover and does some ironing if I have any. I couldn't do better. We're always fairly tidy and clean but it was an effort as I don't get around very well anymore. It's nice to have the house looking reasonable when people come round. It's a relief that it's being done."

"We're very happy with our Home Help. We've had her since April and we're friends now. She's excellent,
I couldn't get anyone better
 and
I wouldn't want anyone else.
 She's brilliant – it was a good move getting her"

Jean, Help at Home client



"I finished work when I was 74 and then I sat at home, bored and didn't know what to do. I said to my partner, who was working, that I felt as if I was buried alive! I wasn't going anywhere or doing anything because when you're at work you have your friends and at weekends you go out with them, or you go shopping or do whatever you do".

"I came here and I've met some blokes and we've been out on some outings. I enjoy coming here, it breaks the week up and I learn quite a bit. I settled in quite quickly and we have a good laugh and a joke".

"I'm glad I came here; I've made some friends. It's good to get out of the house and it saves doing the house-work!! It's a good outlet for me. I could be sitting at home just doing nothing!"

"I'm glad to
get out of the house
 and I look forward to it. It feels like you've done something, you've been
out and met people,
 and it breaks up the week - it's good"

Jim, Men in Sheds client

“ **I think I heard about Age UK Surrey from a leaflet at my GP surgery.**

I decided to phone and ask for some help to apply for a disability Blue Badge. I spoke to Kate in the Information and Advice department and her help was great, I couldn't have done it without her.

Mrs G, I&A Client

I have found the Check in and Chat telephone befriending service really helpful.

I live alone and being disabled I can't go out much so having a call from my befriender every two weeks is something I look forward to. It's nice to have someone to talk to outside of my own family as they are all working and busy during the day.

Mrs M, Check in and Chat client

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**

Keep in touch and follow our news on social media:     @AgeUKSurrey

Age UK Surrey

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