



Strategic Plan 2025-28
Draft
April 2025

1. Our vision, mission and values

1.1. Our vision

“To help older people in Teesside enjoy a fulfilling life by delivering accessible and inclusive services which promote choice, independence and wellbeing.”

1.2. Our mission 2012-28

“To respond to the growing numbers and needs of people in later life in Teesside through innovative services and partnerships which empower individuals to achieve their maximum potential and quality of independent living.”

1.3. Our values

At all times we aim to:

- Be respectful
- Remain committed to diversity and equality
- Work together in partnership
- Maintain the highest standards of integrity and customer service
- Identify and respond to opportunities to change and develop
- Innovate
- Make best use of resources.

2. The challenges – demographic change, public health, legislation, poverty and the climate crisis

Age UK Teesside recognises the complexity of the challenges facing all those involved in providing care and support for older people – families and friends, statutory authorities; health and social care services; charities; community organisations; faith groups and many more.

The data contained in this document reflects the world in early 2025. It is certain that the effects of changes in the global economy will have an impact on many of the statistics reported.

2.1. Demographic change

UK life expectancy has increased dramatically in recent decades (though there are indications that this trend is slowing or even reversing as a result of a slowdown in health improvements) resulting in an ever-increasing number of older people, many with chronic conditions, multiple disabilities and problems of isolation. The latest projections predict that life expectancy remains largely unchanged in the period to 2047.

According to the Office for National Statistics (ONS) UK population growth (2022-2032) is projected to be entirely due to net migration, with the total numbers of births and deaths balancing out. Political pressures on reducing net migration are therefore likely to lead to an increasingly ageing population overall. In this same period the number of people at or above State Pension age will increase by 13.8% to 13.7 million people. This figure is after taking into account an increase in the State Pension age to 67.

A useful measure is the old-age-dependency ratio (OADR), which is the number of people of pensionable age for every 1,000 people of working age. It is projected that OADR will increase from 278 in 2022 to 289 in 2032 (and reaching 302 by 2047).

Across the UK, there were 43 million people of working age in 2022, rising to 47 million by 2032. The number of people of pensionable age is expected to rise from 12 to 14 million between 2022 and 2032.

In the North East of England the overall population is older than in England as a whole, e.g. people of ages 55-59 make up 7.2% of the North East population and 6.7% of the population of England. The North East generally has a higher proportion of the population in the older bands and a lower proportion of the population in the younger bands than in England as a whole. This is based on data from 2022 (ONS).

The North East has a larger proportion of single person and two person households than England as a whole (68.6% of all households compared with 64.1% of households in England, in 2021).

Our area of operation on Teesside mirrors these trends:

Year	2025	2028	2032
65 plus population	120,617	128,410	137,765
As % of total population	21%	22%	24%

[Area of operation is defined as Hartlepool, Middlesbrough, Stockton-on-Tees and Redcar & Cleveland. All figures are projections from the ONS].

The figures for over 85s are 15,342, 15,831 and 18,694 (2.7%, 2.8% and 3.3%) respectively.

This means there will be greater numbers of elderly dependents in the future.

2.2. Older people in minority groups

In delivering support to people in later life, we are conscious that those in minority groups may be particularly difficult to reach and may have specific needs. This includes:

- **LGBT** (Lesbian, Gay, Bisexual & Transgender) people, who represent around 2% of the whole population
- **Ethnic minorities**, representing around 16% of the population of Middlesbrough, 8.5% of Stockton borough, 2.7% of Redcar & Cleveland and 3.7% of Hartlepool. (ONS 2021 data)
- **The prison population** – Stockton Is the location of Holme House, a prison with a population of over 1,200.

Age UK Teesside already works with minority groups, collaborating with representatives of the LGBT community, working with the minority ethnic community particularly with our Information & Advice Service, and delivering services to vulnerable older prisoners in Holme House Prison.

2.3. Older people's health

The rise in the number of older people is leading to significant increases in medical conditions related to older age including:

Dementia: Around 982,000 UK residents have dementia, with one in 14 over-65s suffering from the condition. The numbers are expected to rise significantly, in line with the increasingly aged population.

Isolation and mental illness: Social isolation is an increasing problem for older people and can give rise to serious health problems such as depression, anxiety and cognitive decline. One study concluded that lonely people have a 64 per cent increased likelihood of developing dementia.

Alcohol misuse: Between 2012 and 2019, rates of alcohol-specific deaths in the UK have remained stable, but a statistically significant increase was seen in 2020. The alcohol-specific death rate for 2020 was 18.6% higher than the previous year. Older people tend to drink less than younger people but, even so, one in five older men and one in ten older women are drinking enough to harm themselves. These figures have increased by 40 per cent in men and 100 per cent in women over the past 20 years. The North East has the highest rate of alcohol dependence in England, at 17.73 per 1000 population (13.7 per 1000 population in England as a whole).

Abuse: People in later life are vulnerable to abuse. ONS data shows around 375,000 people aged over 60 were victims of domestic abuse in the year April 2022 to March 2023.

Other significant health risks for older people are Diabetes, Stroke, Falls, Winter Deaths, Malnutrition and Infection.

2.4. Political and financial climate

Local authorities in England suffered unprecedented reductions in funding since 2010. NHS funding has increased but against a backdrop of ever-rising demand and escalating costs. Funding cuts have been especially severe in socio-economically deprived areas such as Teesside.

This squeeze in public spending will continue to put immense pressure on adult social care and health budgets, directly affecting the ability of local authorities and the NHS to deliver against their statutory duties, let alone provide added value services which would especially benefit older people.

Fuel and food poverty is an on-going problem, and the demand for emergency food packages has increased by 94% over the past five years, with over 150,000 food parcels handed out in the North East in 2023/2024. In 2023 there were an estimated 13% of households in fuel poverty in England.

The roll-out of Universal Credit in the UK is designed to be completed by March 2026. The cost of living crisis and continuing uncertainty over the delivery of Brexit, and the global economic shocks caused by wars and trade wars is likely to bring further political upheaval and potentially further damage the economy of the Tees Valley.

This pressure on public services demands a response from voluntary organisations such as Age UK Teesside, which has the capability to increase its service delivery to meet the needs of older people in the area in partnership with the four local authorities, NHS organisations and other charities.

3. About Age UK Teesside

Age UK Teesside is a local, independent charity operating across the four local authority areas of Hartlepool, Stockton on Tees, Middlesbrough and Redcar & Cleveland.

The organisation is currently a “network partner” of the national charity Age UK and part of a network of over 120 other Age UK organisations across the UK.

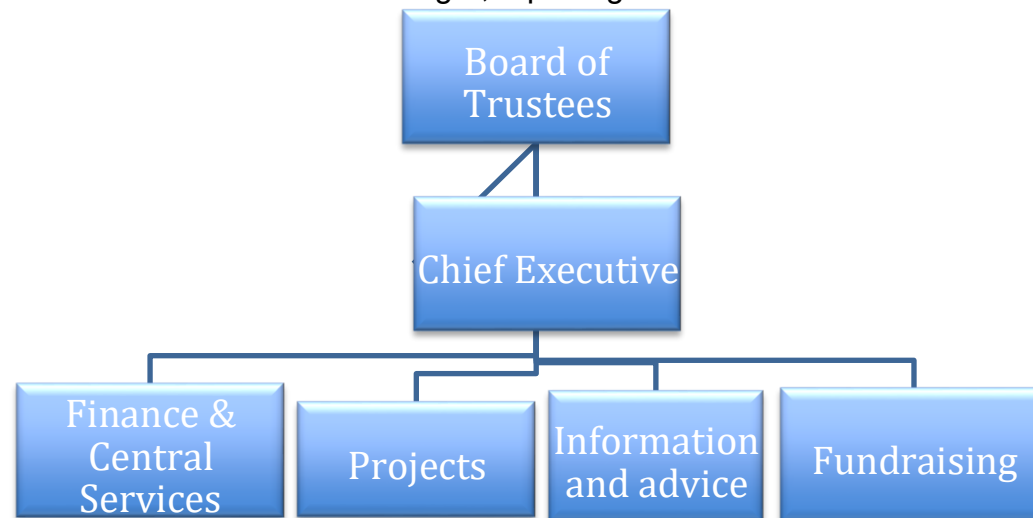
Age UK Teesside operates from its head office in Middlesbrough and satellite locations in the other three boroughs, and has approximately 20 full and part time staff as well as over 200 volunteers.

In 2017/18 our staff and volunteers successfully supported around 7,700 older people in the community, delivering services including financial and benefits advice, social activities, dementia support, health and wellbeing, befriending, financial and disability services and energy advice.

Our organisational and management structure reflects the four core areas of activity:

1. Projects
2. Information & advice
3. Fund raising
4. Financial & central services

Each core area has its own manager, reporting to the Chief Executive.



Age UK Teesside - organisational structure

The organisation is well equipped to play a leading role in confronting the challenges facing older people in Hartlepool, Stockton, Middlesbrough and Redcar & Cleveland:

- We operate from a sound financial position.

- Our staff and volunteers are highly motivated and empowered.
- We work successfully with many local partner organisations for the benefit of older people.
- We have a strong, positive reputation locally.
- Our operating locations across the four boroughs allow us to work with all communities across Teesside.
- We have excellent, accredited quality and operational standards (Age UK National Standards).
- As a full service organisation, we are able to provide many of the needs of people in later life in the area. · Our loyal user group values our personalised, face-to-face service.

However, we recognise the need to improve our performance even further to meet the challenges ahead. We must:

- Further improve public awareness and reputation amongst a wider audience
- Maintain and increase our funding from grants and, importantly, fundraising to ensure we grow our unrestricted income to ensure self sufficiency
- Improve and expand our partnerships whilst maintaining our relationships with current partners and supporters · Maintain and develop a diverse board with expertise to support the charity and provide strategic leadership
- Use an evidence and research based approach to services.

We must also seize new opportunities to improve and broaden our service delivery through:

- Improving our profile and presence in the media
- Increasing our volunteer workforce
- Providing training and personal development for our staff, volunteers and trustees
- Being innovative and creative in the development of our organisation and our services
- Identifying and responding to commercial, trading and fundraising opportunities.

4. Strategic objectives 2025-28

The scale of the challenges facing older people and our organisation have encouraged us to adopt an ambitious set of strategic objectives for the three years of this plan.

Whilst being prudent in the financial and organisational management of Age UK Teesside, we nonetheless aim to offer more services to a wider range of older people in all communities across the area.

Our key strategic objectives are to:

- 1. Celebrate later life, promoting the positive aspects of ageing and the contribution that people in later life make to Teesside.***
- 2. Be relevant, by continuing to provide appropriate and inclusive services and partnerships to help people in later life in Teesside to live independent, happy and healthy lives.***
- 3. Diversify and increase unrestricted income (i.e. income which is not ring-fenced for specific projects) and contribution to core operating costs.***
- 4. Continue to increase awareness about issues relating to ageing.***

5. Service development

Our existing services for older people in Teesside include a wide range of: social inclusion and health & wellbeing activities; information and advice; dementia care; and befriending

5.1. Innovation in service delivery

In the period 2025-28 we intend to continue with these services, where possible, and to deliver additional opportunities for older people – based upon the strategic priorities of the four local authorities, the NHS in Teesside, Integrated Care Boards and other partner organisations, as well as our own objectives.

Our main funders have made it clear that in future they hope to provide financial support for new and innovative approaches to promoting independence, wellbeing and choice for older people. In addition, they hope that new services can become financially self-sustaining in the longer term.

We will respond by seeking to develop new services. We will do so by:

- Researching best practice elsewhere in the Age UK network and adapting these ideas for application in Teesside.
- Developing our new Services Sub-Committee to cultivate our own approaches to the challenges we face. The group will have input from our trustees, managers, staff and volunteers.
- Mapping our new ideas against a hierarchy of older people's needs and funders' priorities, identifying gaps and filling them where possible.
- Working where possible with researchers with shared interests who can provide high-level validity to our work.

5.2. Working in partnership

Partnership working is a vital component of our success. We have excellent relationships with our partner local authorities, NHS organisations, other charities, educational institutions, community organisations and the private sector.

We believe that further improving our relationship with partners, and seeking out new partners with whom we can work, will enhance our ability to reach out to a wider range of older people across Teesside. We will therefore aim to extend our contacts and develop opportunities with diverse groups in the communities of Teesside.

6. Investing in people

We will provide our management, staff and volunteers with the support they need to maximise their potential, empowering them to engage with older people and help us to deliver the high-quality services which the older people of Teesside deserve.

6.1. Board of Trustees

The Board of Trustees is made up of volunteers who are responsible for ensuring the organisation carries out its legal, financial and charitable duties. The board members also provide a range of specialist management skills.

To ensure the board is fully equipped to drive the continued development of the organisation, we will:

- Where required, recruit new trustees with the knowledge, skills and experience we need, especially professionals from the health and adult care sectors.
- Ensure that the board is “refreshed” on a rolling basis, working to the guidelines recommended by Age UK.

6.2. Management team

Our support and development for the management team will include:

- CPD programmes for all managers
- Regular one-to-ones and reviews/appraisals
- Setting of clear business objectives
- Specialist training

6.3. Staff

For staff we will undertake:

- A biennial satisfaction survey
- Regular one-to-ones
- A staff development programme
- Specialist training

6.4. Volunteer recruitment and management

Age UK Teesside volunteers fulfil a wide range of roles, including supporting our projects working with older people and working in our central services department.

We believe that having an optimum balance between professional staff and volunteers, we are able to both provide high quality services and deliver them at the lowest possible cost to the charity and to those organisations which help to provide our funding. This includes local authorities, charitable trusts and others' organisations.

We will launch a drive to further develop our volunteer resource, aiming both for increased numbers and for the highest possible quality. This will include:

- Recruiting from other networks
- Offering placements for university and college students.

7. Marketing and publicity

Age UK Teesside will continue to run proactive marketing and public relations campaigns aimed at: highlighting the challenges faced by people in later life; raising brand awareness and understanding of the work we do; volunteer recruitment; supporting our fund-raising events and activities; and celebrating the value of older people.

To achieve these objectives we will use a full range of communications techniques including: social media; website; video; direct marketing; literature; newsletter; media relations; and a stakeholder outreach programme.

8. Financial Resources

The trustees and management of the Charity will continue to operate a careful and prudent approach to financial management. This approach is to ensure the Charity generates incomes sufficient to meet the costs of delivering project outcomes and managing the costs of running the Charity while retaining sufficient reserves for the future.

8.1. Income

Age UK Teesside receives several forms of income:

- Grant funding for projects and services from various stakeholders and delivered across the Teesside area. Such income is restricted to spending associated with project delivery
- Contributions from the national charity, Age UK
- Community fundraising, mainly based around sponsored events and activities.
- Legacies and Donations
- Corporate fundraising
- Online retailing of used clothing and consumer goods

We will aim to continue growth in income, working on:

- Partnership with a wide range of stakeholders including local authorities, NHS and charitable trusts
- Community fundraising activities
- Expanding corporate donor contacts
- Growing our online-retailing operation
- Continuing to explore the potential for other revenue-generating products and services
- Supporting and sustaining funding from local public services, responding to the need for added value and, where possible, self-funding, sustainable services
- Delivering our services on a paid-for but affordable basis, where appropriate

8.2. Financial Forecasts

The financial forecasts are based on current activities continuing, with inflation on expenditure expected in each forecast year and incomes required to increase similarly each year, to largely meet inflationary pressures.

Restricted activities are mostly project related with associated incomes and direct expenditures for the delivery of specific project outcomes to older people across Teesside, and some contribution to indirect expenditures for support to those projects.

Unrestricted activities largely comprise income and associated expenditures from retail activities and fundraising, with general overhead expenditures for the management and administration of the Charity.

Contributions from the Charity reserves are forecast to maintain current activity levels through a period of high inflation.

Financial governance includes for regular monitoring of income and expenditure throughout each year, including for the requirement to maintain reserves and cash equivalent to at least six months of Unrestricted Expenditure.

FINANCIAL FORECASTS 2022-25

	2022-23	2023-24	2024-25
	Budget	Forecast	Forecast
	£'000	£'000	£'000
Restricted Income	687	756	793
Unrestricted Income	115	115	115
TOTAL INCOME	802	871	908
Restricted Expenditure	-624	-686	-721
Unrestricted Expenditure	-235	-259	-271
TOTAL EXPENDITURE	-859	-945	-992
Restricted	63	69	72
Unrestricted	-120	-144	-156
SURPLUS/-DEFICIT	-57	-74	-84
SURPLUS/-DEFICIT BFWD	542	485	411
SURPLUS/-DEFICIT CFWD	485	411	327

1. Risk analysis

The Board of Trustees, management, staff and volunteers continuously monitor potential risks facing Age UK Teesside and act to mitigate potential damage.

We have developed a risk management strategy which identifies the potential risks to Age UK Teesside, the appropriate control measures needed to manage the identified risk, an assessment of the risk level when control measures have been applied, and any future controls that may be necessary in order to ensure that the identified risk is reduced as far as possible.

We identify the main potential risks facing the organisation in the period as:

Risk	Mitigation	Monitoring
Financial: Economic and political upheaval leading to difficulty in attracting funders, reductions in public sector budgets; reduced long-term funding commitments; raising unrestricted income; and diversifying sources of funds	Intensify fundraising and raising of grant income; maintenance of reserves to ensure service delivery and continuity	Quarterly board reports and daily management monitoring of bid success and income, supported by professional finance manager & treasurer
Staffing: ensuring recruitment and retention of high quality managers and staff; resilience in covering for absence of key personnel	Competitive remuneration and rewarding working environment; empowerment of highly-motivated managers and staff; training support; agreed responsibilities for covering CEO and other senior positions	By CEO and operational managers; exception reporting to Board of Trustees

Health & safety: protection of service users, staff and volunteers	Qualified and trained staff; safeguarding policy; accident reporting and follow-up	Quarterly board reports
Safeguarding: of vulnerable older people	Safeguarding policy and review process; qualified and trained staff	Quarterly board reports; annual board report and review
Business interruption	Maintenance of business continuity plan	Review by CEO

2. Evaluation and reporting

Evaluation of our effectiveness is carried out at our quarterly board meetings. In addition, evaluation and review is undertaken on an annual basis. Targets are set for key objectives.

Detailed monitoring and evaluation is undertaken at board sub-groups for finance, HR and marketing. Evaluation of our projects is also discussed at regular staff meetings and appropriate responses agreed.

The Chief Executive takes responsibility for ensuring that evaluation is carried out for our charitable activities. Age UK Teesside uses Charity Log, a cloud-based CRM charity database, monitoring service delivery and project outcomes.

The Finance Manager is responsible for financial monitoring and reporting.

In addition, projects funded by external organisations are subject to individual evaluation methodologies and reporting procedures determined by the funder.

For the period 2022-25, we will adopt the following key performance indicators:

Objectives	2021/22 Achievement - Actual	2022/23 Achievement	2023/24 Achievement	2024/25 Achievement	Performance Indicator	Comments
Increase the number of older people supported by Age UK	14,010	16,615	17,824		10% annual increase	
Project Success	100%	100%	100%		100% funder approval of project achievement	

Successful Funding Bids	£475,971	£783,587	£520,794			2021/22 figures positively affected by Covid. Decline in income likely.
Fundraising – community & corporate	£16,511	£42,087	£70,411		£32,000 in year one; 10% rise per annum in years two and three	2022/23 figures negatively impacted by Covid. Overall charity giving negatively impacted by economy/inflation in 2022.

Fundraising - retail	£21,886 net	£19,055 net	£8,650 net		10% rise in year one; 50% rise in year two; 50% rise in year three	
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Net financial assets	£684,696	£623,125	£631,105		Manage net financial assets and reduce projected deficit by a minimum of 50%	
Staff morale	90%				Conduct biennial staff surveys: 2023/24 and 2025/26 to assess – aim is to achieve at least 90% staff satisfaction overall	

