Evaluation of HelpAge International, core support partner for Sida (Swedish International Development Cooperation Agency)

Executive Summary

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EXECUTIVE SUMMARY

Evaluation background and aims

This report presents the main results of the evaluation of HelpAge International which is part of the four-year agreement between Sida and HelpAge International, receiving core support from Sida from June 2015 to December 2018. The focus of this evaluation is to provide recommendations towards HelpAge's future International strategy. The starting point for the evaluation approach is HelpAge's organisational 2020 Strategy and Theory of Change (ToC).

HelpAge International thematic priorities:

- *I have the income I need*
- *I enjoy the best possible health and quality of life*
- *I am safe and secure, free from discrimination and abuse*
- *My voice is heard*

The thematic priorities of HelpAge International's Theory of Change are translated into strategic goals (and sub goals) in the results framework. HelpAge International identified five different pathways through which the objectives can be reached: the network approach, programme delivery, advocating for change, strengthening voice, and knowledge and evidence.

The evaluation is used to assess and test the relevance, effectiveness and sustainability of HelpAge's Theory of Change and the effectiveness of HelpAge's ongoing integration of inclusion (of age, gender, and disability) across all its work. The evaluation questions, as presented in the ToR (see Annex 7) are:

Relevance

- *To what extent is HelpAge's strategy Theory of Change relevant to the needs, rights and priorities of its intended beneficiaries (i.e. older women and men)?*

- *How well is HelpAge able to articulate and evidence its approach and success in targeting, reaching and including the poorest and/or most vulnerable or marginalised older people in its programming, humanitarian response and advocacy work?*

Effectiveness and Sustainability

- *To what extent is HelpAge able to demonstrate sustainable results delivery of (at outcome level at country, regional, global and network levels) across all five pillars of its Theory of Change and strategic goals?*

- *How effectively and sustainably is HelpAge working across each of its five ToC pillars to achieve intended results and adopting more inclusive approaches throughout?*

- *To what extent is HelpAge able to sustainably generate, share and use learning across the organisation and Network to strengthen capacity and improve results delivery across its strategic goals?*

These questions have been further developed and agreed with the contracted evaluator during the inception phase. Detailed information on the evaluation approach, data collection methods, the evaluation matrix, which elaborates on the evaluation questions, are presented in Annex 2.[1]

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[1] To have a good interpretation of this evaluation's key findings it is important to consider how the original evaluation questions have been interpreted and further refined by the evaluator.

Summary of the main evaluation results

HelpAge's organisational Theory of Change is supported and recognised within the organisation, by HelpAge staff in the Secretariat (London and regional hubs) and national offices, by network members and implementing partners. The ToC is recognised as the product of a proper consultation process, which explains the large base of support and ownership at these levels. HelpAge's strategic goals and results framework targets reflect the needs and priorities of older men and women; this was identified during the ToC elaboration process but also during the evaluation activities by older men and women themselves.

The fact that the global ToC is very general and simplified is both a strength and weakness. ToCs constructed by different people at different levels, e.g. HelpAge staff at national levels, network members and partners, local older people organisations, older women and men, individually align with or reflect the global HelpAge ToC with their own accents as the global strategy leaves enough flexibility to adapt the approaches and priorites to local needs.

The weakness of the simplification is that the global ToC doesn't help identify alternative strategies, preconditions, stakeholders or assumptions, which are often context-specific. The evaluation identifies the lack of attention to stakeholders and their positions, for example, regarding their interests, alignment or influence, ... as an important reason why outcome level results, mostly to be identified at the level of boundary partners, remain under-reported in the organisation's documents.

As the components of 'Voice' and 'Advocacy' become more important in HelpAge's work, this urges the need to have a common understanding of the concept of outcome-level results, to have a consensus to specify outcome-level results the organisation wants to be held accountable for and to elaborate an appropriate monitoring system to follow-up on these.

Currently, a lot of the knowledge on stakeholders, their positions, the process and different steps involved in influencing and achieving results, is connected to an individual or a set of individuals rather than being capitalised in the institutional memory of the organisation. The findings from the document study indicate important differences in the extent to which HelpAge is able to demonstrate sustainable results delivery in its reporting at different levels. From a monitoring perspective, the quality of information provided on outcome-level results declines with the reporting level. Where national and programme-specific reports provide information on different stakeholders and different steps associated with the achievement of outcome-level results, this information gets lost in the regional- and global-level reporting.

The most useful part of the global ToC is the link it makes between knowledge and evidence, voice and lobbying and advocacy. This interconnectedness is also widely applied at implementation levels through evidenced-based advocacy by national HelpAge staff, by network members and implementing partners and by older women and men themselves.

For each global strategic goal, the observations from field visits show different steps in the process of influencing, lobbying and advocacy and examples of impact on the wellbeing of older women and men. Changes identified by local stakeholders, including older women and men, refer to international agencies and national (or local) governments taking into account the needs and priorities of older men and women, putting ageing on the (political) agenda, and being open and willing to consider new strategies or adapt existing strategies and policies. Older women and men, organised in structures at local, regional and national levels, have increased their voice to hold responsible government departments accountable. These actions have resulted in improved wellbeing of older women and men.

Within the global strategy, a big challenge for HelpAge's future work is situated at the level of the network development and the network approach. HelpAge is now in the process of changing into a network organisation as their recent commitments, investments and activities related to network development show. At this moment, strategic decisions on roles and responsibilities have not yet been taken. This will influence what the network will look like, what roles the global secretariat will play, and how the network will be governed. These questions are currently dealt with inside the organisation, mostly at the global secretariat level, but important to consider is that there exist different interpretations and expectations of 'the network' amongst staff (at all levels) as well as network members and implementing partners. The current network mapping survey might be a helpful step to see what directions member organisations can and will give to the development of the HelpAge network.

Many issues relating to inclusion, whether referring to gender, disability or specific vulnerable groups identified by the evaluation, have already been highlighted in HelpAge's previous processes and reflection exercises. All HelpAge staff are aware of the organisation's gender and inclusion agenda and commitments. However, rather underdeveloped are the

contextual analyses at the implementation level. Although gender does play a role at implementation level, most programmes do not specify specific gender goals and in documents gender is mostly referred to in terms of (equal) participation rates of women and men but no deeper gender analysis (e.g. analysis of power relations) is presented. A similar observation is made for disability; inclusion commitments have not (yet) translated into specific programme objectives. From an organisational perspective, many commitments can be articulated and charters signed but the first pre-condition of taking gender or disability into account is knowing what issues are at play. Based on local-level analyses, specific goals can be set and approaches to reach these goals can be developed. HelpAge's own decision-making structure lacks an institutionalised platform or group of older peoples' representatives to inform higher-level management decisions.

Main recommendations

The evaluation conclusions were discussed and tested in a validation workshop with the Evaluation Advisory Group and HelpAge staff involved in the evaluation. The workshop also helped shape the recommendations presented in this final report. Following prioritisation, three main areas for recommendations are identified: inclusion, network development and outcome-level reporting. These are further discussed below.

Put inclusion commitments into practice

- Inclusion commitments have not (yet) translated into specific programme objectives. Based on local-level analysis, programmes can include specific inclusion goals (for gender, disability inclusion etc) that go beyond (equal) participation rates.

- Investing (more) in local-level studies or analyses of gender issues will gain insights on, for example, potentially different barriers for women's and men's participation in village-level committees or higher-level representation structures, and potentially gendered impacts of social protection models, access and use of health care services. Based on these insights adaptive strategies can be initiated.

- The validation workshop indicated that while gender is an issue HelpAge staff take to heart, there is no commonly shared vision (yet). Being clearer on HelpAge's overall aims and strategic goals for gender will help discussing and creating a shared vision among HelpAge staff (and vice versa, a shared vision will create clear aims and strategic goals). For example, some staff would like to see achieving gender transformative changes at all levels (organisational and programme) as a strategic goal.

- The institutionalisation of a platform or a representative group of older people to inform HelpAge's higher-level management decisions is an excellent opportunity for older people to give their ideas on, for example, increasing inclusiveness or to be a reference group to which HelpAge is accountable. This also fits with HelpAge's overall strategy to enable the voices of older men and women to be heard in all areas of programming.

Review strategic engagements and communications for network development

- For future work, it is important to further consider to what degree different network members want to be aligned with HelpAge and how to deal with different grades of engagement. For example, what are network members' and implementing partners' expectations regarding funding and resources, and are expectations mutually compatible? Do network members aim at having joint projects, or are they mainly interested in using the network for looser contacts and networking? The recent network mapping exercise will shed a light on these questions. Bottom-up feedback from network members, implementing partners and other local stakeholders will give strategic direction towards the work of network development and is important for the viability and sustainability of the network.

- The evaluation highlighted the diversity of network members and implementing partners involved in HelpAge's work as a major challenge for HelpAge's network development and viability and sustainability of the network. Validation workshop participants felt that presenting this as a challenge, rather than an opportunity, fails to reflect diversity as an advantageous, positive characteristic or as an achievement of HelpAge. Further investments in analysing (and communicating) potential synergies and positive complementarities resulting from this diversity will positively influence viability and sustainability of the network.

- Currently, the work on network development is heavily focussed on organisational issues related to the elaboration and coordination of a network. The link between the needs and priorities of older people and added-value of the network is less clear which makes it more difficult to identify the relevance of network development to the needs

and priorities of older men and women. A future research question for HelpAge specifying and testing the hypothesis that network development is relevant for the needs and priorities of older women and men and then questioning the assumptions behind this, would make the link more explicit.

Revisit HelpAge's organisational Theory of Change

- HelpAge's organisational ToC acts as a strategy implementation model, which is different from ToC approaches commonly used in the development sector. To avoid misunderstanding, HelpAge could refer to the model as its 'strategic implementation model' instead of a ToC.

- Using a ToC approach will help HelpAge in planning, monitoring, learning from, and communicating its contributions to change. This starts with investing in developing local ToCs to identify and make explicit different pathways of change for realising a final (societal) change. A correct use of the ToC as a tool does not limit the change pathways to the organisation's own work or strategies but allows broader thinking on potential impact pathways beyond the scope of what HelpAge is already doing, i.e. identifying alternative strategies. Making alternative strategies explicit is also important for stakeholder identification and analysis. For each change pathway the assumptions need to be made explicit.

Improve outcome-level reporting to better understand and communicate 'how' results have been achieved

- To improve reporting on outcome-level results, these results need to be the focus of HelpAge's attention, instead of activities and outputs. Especially were HelpAge is involved in lobbying and advocacy, often in cooperation with local stakeholders, results should describe what the governments or other stakeholders have changed, and what has changed in the position of these stakeholders, alongside a description of the role and contribution of HelpAge in achieving this change. To this extent, an outcome mapping approach can help to define outcome results for which HelpAge can be held accountable. Improved reporting on outcome-level results should start with a clear stakeholder analysis explaining the roles of network members, implementing partners and other stakeholders. Specifying which 'partners' are advocacy targets, rather than partners, can also make outcome results more explicit.

- Overall, information on network members and implementing partners is rather limited. An overview and contact details of members and implementing partners and explaining their role should be included in reports (and on the website).

- Outcomes or changes at the level of stakeholders can refer to many things and HelpAge can start describing these changes as different steps in the process of influencing, lobbying and advocacy. The links between activities and outputs (for example pilot results or other evidence), and their effects on governments' and other stakeholders' awareness, knowledge, attitude and practices, can be made explicit. Other examples of stakeholders' outcomes are agenda-setting, discursive change, strengthened capacities, and procedural change. These outcomes are based on frameworks used by ODI (2014) and the Dutch Government (2017) to monitor influence and change from lobbying and advocacy activities and could also be used as inspiration for HelpAge to describe different outcomes of its work.

Strengthen HelpAge's learning approach

- Having more opportunities for peer learning for local-level structures such as the older people's organisations would meet a demand of older people at programme level. Local-level platforms can be arenas of exchange and peer learning between OPMGs, OPFs, OPSHGs, VDCs etc. Peer learning works best when similar actors are brought together in informal meetings with little or no formal presentations, little or no formal speakers. HelpAge support should focus on bringing the peers together and facilitating feedback and learning between them and avoid uni-directional transfers of knowledge. South Research experience suggests strategies of 'Intervision' and 'Perception Collégiale', where groups can talk about their struggles and problems, and other groups give their own interpretations and can formulate their own suggestions, are approaches that give good results.

- There is currently little evidence as to whether and how HelpAge's thematic learning groups are acting as catalysts to create new insights or disseminate learning for wider audience and other stakeholders in the network. Further follow-up and analysis is needed to provide a more detailed analysis of the balance between investments made in learning groups and the results and satisfaction of participants. Striking this balance also requires taking into account existing learning platforms outside HelpAge's structure (at international, national and local levels) to identify the added value of HelpAge learning groups in addressing existing learning gaps (and needs). Moreover, if the benefits of learning groups are limited to HelpAge staff, the added value of this structure can be questioned as HelpAge staff is already organised in the global and regional team meetings.