

Management Response to the Sida Evaluation Recommendations

December 2018

Background

With HelpAge's current core-funding partnership agreement with Sida ending in December 2018, this external evaluation provided a timely and valuable opportunity for an independent perspective on our strategic progress over the 2015-18 grant period, and specifically for testing the relevance, effectiveness and sustainability of our organisational Theory of Change as a strategic implementation model for delivering our 2020 strategic goals. We also welcome its observations on the effectiveness of HelpAge's ongoing efforts to strengthen age, gender and disability inclusion across all our work.

The evaluation findings helpfully build on HelpAge's internal mid-term strategy review in 2017, which informed our direction and focus over 2018-20. Its forward-looking perspective will usefully inform the organisation's thinking in developing our strategy and theory of change for strengthening our network secretariat role in fostering positive change for older women and men beyond 2020. We hope, too, that the external perspective it offers will usefully complement our own organisational performance reporting.

The world is changing dramatically, particularly in terms of its demographic configuration as populations age. This challenges us to continuously seek ways of working over our next strategy period that enable HelpAge and the Network to remain relevant in advancing the rights of older women and men, whilst also supporting societies to adapt their policies and systems for ensuring income security, health and care, and protection and inclusion of older people. This commitment will bring new uncertainties and learning.

From January 2019, therefore, we will begin a new phase of strategy development for the 2020-30 period. The evaluation's findings, conclusions and recommendations will feed into this process, which will include both internal reflection and external consultation on our strategic direction and focus, and any adjustments needed to our strategy implementation model (Theory of Change) for delivering this.

Our overall response

We welcomed the evaluation approach adopted by the evaluator, particularly the opportunity provided to accompany the two country visits, which provided valuable learning for us, and, through the validation workshop, to help inform her selection of focus areas on which to develop her recommendations. We are particularly encouraged by the following findings:

1. That our global ToC is providing strategic direction and helping to align programmes with global approaches;
2. That our strategic goals and results targets reflect the needs and priorities of older men and women;
3. That our inclusion focus has been adopted and implemented in our humanitarian programmes and is beginning to grow in our development programming;
4. That our reports show good examples of where we are effectively capturing evidence of policy shifts and how these are linked to the results of our lobbying and advocacy work;
5. That for each of our strategic goals, our influencing, lobbying and advocacy work has resulted in changes for key stakeholders, and that there are examples of positive impact on the well-being of older women and men;
6. That older women and men have increased their voice to hold governments to account, and that these actions have resulted in improved wellbeing;

7. That learning is recognised as a key priority for staff, network members, implementing partners and governments we work with, and that our knowledge and evidence approach is resulting in changes in stakeholders' knowledge, capacities and policy positions;
8. That local actors recognise HelpAge's technical input and expertise and see the training and experience-exchange opportunities we offer them as key vehicles for learning.

The evaluation usefully identifies key challenges and issues for consideration around our inclusion agenda, network development, outcome reporting and organisational and network learning. These resonate well with our own sense of some of the critical areas of work requiring further development or investment over the current strategy period, as well as further reflection in our forthcoming 2030 strategy development process.

Our responses to specific recommendations are outlined below with Director leads identified for taking agreed actions forward. These will be reflected, as appropriate, in our 2019/20 Business Plans and our 2030 strategy development process. We will report back on progress through our internal reporting processes and in any future reporting to SIDA.

Of the 14 recommendations made, we fully accept eight and partially accept six, for reasons outlined below.

Recommendation	Accept	HelpAge Response
1.		Put inclusion commitments into practice
1.1	Partially accept	<p>Our mapping of inclusion practices in our programmes (completed for our global staff conference in 2017) revealed that while there are pockets of good practice in specific countries and programmes (including in Tanzania and Myanmar), which show we are putting into practice our age, gender and disability inclusion commitments, there is more to do to systematise this across all regions and areas of work. We have now (in December 2018) embarked on an organisational assessment and action planning process to help address this.</p> <p>However, we fully recognise the need to go beyond gender as an issue of equal participation of women and men, or of numbers of older people with disability being engaged in our programmes, to examine and address inclusion barriers relating to age, gender and disability to enable more equal participation and greater gender equality for older women. This is echoed in our recent research on ageing and gender with Warwick University (Transforming Gender Relations in an Ageing World, a Policy Discussion Paper, August 2018) and is now being addressed through a global gender action plan for 2020 (December 2018), which resulted from this collaboration and was agreed during the evaluation period. This includes commitments around strengthening our data, evidence and learning on ageing and gender, strengthening gender analysis within programme design and advocacy messaging, and creating more opportunities for policy influencing on gender-transformative actions, particularly for older women.</p>
1.2	Fully accept	<p>Under our global gender action plan for 2020, local-level gender analysis in programme design remains a minimum standard for all HelpAge programmes, aiming to ensure our interventions are at least gender sensitive and transformational for older women, wherever there are opportunities for this. We have also agreed to expand our Gender Focal Points (GFPs) approach and develop a trainer-of-trainers training package for equipping GFPs to strengthen their own capacity on gender analysis, and refreshing and supporting that of staff, Network Members and partners. GFPs will allocate 10% of their time to support teams in taking forward their gender inclusion responsibilities. ToR for GFPs are now being firmed up and GFPs in each region/dept identified.</p> <p>Training will include strengthening gender analysis in project funding proposals and design and promoting collection, analysis and use of sex-, age- and disability disaggregated data (SADDD) in programmes to facilitate better understanding of barriers to inclusion, particularly for older women, and generate evidence for strengthening gender and disability inclusion in our own and others' work – including on social protection, health and care and</p>

			<p>other core themes. A target for this is now reflected in our organisational results framework and we will report on this from 2019.</p> <p>Under our global gender action plan, we are also seeking out new partnerships and funding opportunities for strengthening our data, evidence and learning on ageing and gender and creating opportunities for wider policy influencing on gender-transformative actions within our ageing work. This includes reaching out to gender-focused and women's rights organisations who can work with us on this. New investment has been committed to deliver this gender action plan, and all Business Units have been asked to identify how actions can be resourced via core budget allocation and resource development efforts.</p>
1.3	<p>The validation workshop indicated that while gender is an issue people take to heart, there is no commonly shared vision (yet). Being clearer on Help Age'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.</p>	Fully accept	<p>A first action in our gender action plan is to embed a clear vision and rationale for gender mainstreaming. This will be done through updating our Gender Equality Policy and our Gender Minimum Standards in Programming guidance to align with this plan and reflect the agreed outcomes of our gender research with Warwick University. We have committed to ensure this vision is reflected in all new (and refresher) staff induction (via updated e-learning gender and ageing module), and that clarity on gender attitudes and behaviours expected of all staff flows from our refreshed organisational Values, which include inclusive behaviours.</p> <p>Three new gender results targets for 2020 have been added to our organisational 2020 results framework, actions towards which will be reflected in our business plans for 2019/20 and reported on via our internal reporting processes and in our reporting to Sida. These include:</p> <ul style="list-style-type: none"> • All HelpAge external advocacy outputs will include gender analysis as part of their production process to inform and strengthen our advocacy messaging; • We will be able to demonstrate improved use of SADDD in our work in a number of target countries - number to be decided following baseline survey; • A target percentage of new project funding proposals will be meeting HelpAge's gender minimum standard (at least Gender Sensitive) – target to be set following baseline review. <p>We will explore the possibility of gender transformative change becoming an explicit strategic goal in our strategy development process for 2030. In the meantime, we have asked all Hubs/teams, and invited Network Members, to discuss this as part of their own reflections on Warwick University's Policy Discussion Paper on Ageing and Gender, August 2018. To this end, our action plan includes, for example, a commitment to build more integrated ageing and gender messaging in our policy advocacy work, including via active consideration of the Discussion Paper. We have also agreed to convene cross-Hub forums to agree on key 'takeaways' from this that will inform programme design as well as national, regional and global advocacy messaging, as a tool to achieve gender</p>

			transformative change, particularly for older women.
1.4	The institutionalisation of a platform or a representative group of older people to inform HelpAge's high-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 overall mission to enable the voices of older men and women to be heard in all areas of programming.	Partially accept	<p>Strengthening older people's voice is one of HelpAge's four strategic goals, aiming to facilitate older peoples' independence, autonomy, empowerment, accountability, participation and agency. This commitment includes constantly seeking ideas and views from older people in shaping the strategic direction of our work. We made efforts to include older people's voices in our 2017 strategy refresh and are considering how best to do this effectively in planning our approach to 2030 strategy development to enable older people to be consulted and engaged.</p> <p>Following the 2017 strategy refresh, we committed to scale-up our 'Voice' work, which includes listening to the views of older people in making management decisions, both within HelpAge programming and within our network secretariat role. While HelpAge has for many years facilitated older people's participation and inputs in high-level regional and global forums, our experience tells us that more can be done to strengthen Voice at national and local levels. To this end, we are now working to create networks of organisations working for older people at national level (or strengthen national federations of older people's associations that already exist) and foster national ageing platforms. These act as representative bodies that can listen to and reflect older people's issues at national level and thus strengthen the work of HelpAge and its network members in a country. Such bodies also play a role in influencing national policies related to population ageing and hold government accountable for the implementation of ageing policies and programmes.</p> <p>Following a recent independent review of our Age Demands Action (ADA) campaign, we are now also actively considering how an older person-led ADA steering group could directly strengthen older people's voice in global campaign decision-making. In all such cases, we are careful to ensure older people's direct involvement is not nominal or tokenistic, but genuinely allows their voices to be exercised and heard. Reflecting our mandate, the HelpAge International Board and Directors' group are also well represented by older women and men.</p>
2.	<i>Review strategic engagements and communications for network development</i>		
2.1	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	Fully accept	HelpAge's understanding of and engagement with the network and network members' expectations has picked up significantly over the last two years under the leadership of the Network Coordination and Development team, which formed in 2017 and adopted a network development model which is now being pursued. During our strategy refresh in 2017, for example, we consulted our members extensively on their expectations of HelpAge

	<p>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.</p>		<p>as a network secretariat, including via one-to-one consultations with 64 members, focus group discussions with key others, and an online survey to all 138 members.</p> <p>The results of our recent network mapping survey emerged towards the end of the evaluation process and are now being actively interrogated to help us better discern and respond to our network members' needs, interests and areas of expertise. Network members will also be consulted on HelpAge's strategy development process for 2030, which will help shed light on some of these questions.</p> <p>However, given the diversity of the Network, we are not expecting or seeking uniformity of engagement by all members. We recognise that members will select a level and type of engagement consistent with their own mandate. For HelpAge's role as a network secretariat, the most important link between members will continue to be around the focus on population ageing. We will continue to foster and facilitate context-specific engagement by all those wishing to be part of the network. This may include supporting network member fundraising, as we are currently doing in Africa, or organising regional events to bring interested network members together with other key stakeholders (eg researchers, governments, donors) to exchange around common themes.</p>
2.2	<p>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</p>	<p>Partially accept</p>	<p>HelpAge sees the diversity of the global network as a great opportunity and strength in delivering its goals and sustaining its work. This is bolstered when we partner with a diversity of members, partners and actors. Harnessing this diversity can and does lead to positive and long-term change for older people.</p> <p>We acknowledge, however, that HelpAge's capacity as the network secretariat is a key constraint in servicing the diversity of the network. To address this, over the last year key investments have been made to map our membership and get to know our members even better. As per our response to Recommendation 2.1, we are now acting on these results to better discern and respond to network members' needs and interests and harness their expertise. Each HelpAge business unit will now interrogate the results of our network mapping and database to enable us to develop plans for how we work with/through/for our network membership.</p> <p>Ongoing investment in the delivery of an online Knowledge Platform will assist with this. Once in place, this platform will enable Network Communities of Practice to develop and share knowledge and expertise on key themes, thereby realising potential synergies and positive complementarities at local, regional and global levels. Our strategic approach to Network growth will also enable synergies between members: prospecting for new members, and growth gap analysis, will enable us to target and recruit new members who</p>

	influence viability and sustainability of the network.		offer to positively complement work on existing priority themes and lead to the emergence of new ones.
2.3	<p>Currently, the work on network development is heavily focused 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.</p>	Partially accept	<p>As a secretariat to a global network, HelpAge works with, through and for its network members, most of whom are civil society organisations. In turn, our members work with, through and for older people in communities. The link between our work with the global network and the needs and priorities of older people is continuously maintained through this relationship and the regular consultations we undertake with network members.</p> <p>Our strategy refresh process in 2017 informed our medium-term plan for developing the network. We consulted with over 60 network members and older people's associations (OPAs) to ensure our strategic priorities for the Network aligned with that of members and older people. We will repeat this process in developing our 2030 Vision and Strategy, thereby ensuring this link is maintained as we look to the future.</p> <p>This link between older people's priorities and network development is also maintained through our global campaigning platform, Age Demands Action (ADA). The majority of ADA campaigning partners are also network members. Campaign partners work directly with older people on issues identified and led by them. Consultations with older people via ADA partners and network members also inform our wider advocacy work, which is increasingly moving towards a model where advocacy messages are endorsed by network members.</p> <p>An independent review of ADA in 2018 sought to test its link and relationship with the network. The final report and recommendations emerged after the Sida evaluation. It recognised there is more we can do to strengthen the link between the ADA platform and the network and we are now developing our response to its recommendations, which will look to positively implement the suggestions the review offers.</p> <p>Our future ambitions for the network will include connecting our work with the global network and national platforms to our work on Voice and mobilising a movement of older people to deliver a joint vision for change.</p> <p>The evaluation country visits also usefully highlighted our need to provide clearer guidance and terminology for HelpAge teams to better distinguish in communications between our work with the global network membership vis-à-vis our work on regional and national platform-building and/or local-level 'networking' that is core to partnership and programme work.</p>
3.	<i>Revisit HelpAge's organisational Theory of Change</i>		

3.1	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.	Partially accept	HelpAge's organisational Theory of Change will be reviewed and revisited towards the end of our 2030 strategy development process in 2019, once the outcomes of the process are clear. We will then be able to test its continued relevance and decide on any adjustments needed, to ensure it is fit for purpose for supporting delivery of our new strategy. This will include consideration of the most appropriate ways of naming, framing and communicating it to staff, Network Members and other key stakeholders, including our core funding partners. However, its practical use at all levels is what we are most committed to ensure, and we are encouraged by the evaluation finding that our global ToC continues to provide strategic direction to programmes and help them align with our global strategy.
3.2	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.	Partially accept	The value of theory-of-change based approaches to work are well understood within HelpAge at multiple levels (as the evaluation findings testify). We are aware that there are several different ToC models in use across the sector, rather than one single approach. As part of our business plan for 2018-20, we are now developing an organisation-wide MEAL framework (for Monitoring, Evaluation, Accountability and Learning) for HelpAge which aims to support more consistent and systematic approaches to MEAL across our programmes and Network secretariat role. This will include basic guidance (with references to further resources) on theory-of-change approaches for use at programme, thematic or organisational levels. We will determine the level of investment required to help further embed our understanding and use of ToC approaches across HelpAge teams once the MEAL framework is agreed, and the capacity-development requirements of staff and partners for implementing this are identified through its piloting and testing phase from 2019-20.
4. <i>Improve outcome-level reporting to better understand and communicate 'how' results have been achieved</i>			
4.1	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	Fully accept	Approaches for improving the quality of outcome reporting across HelpAge, including for our advocacy work, will also be addressed in our MEAL Framework and accompanying guidance. A first draft of this is now being developed for testing and piloting in 2019-20. This will include guidance on theory-of-change approaches and other methods, such as contribution analysis and process evaluation (eg to track our contribution to progressing a new UN Convention for older people), that offer to deepen our understanding of how

	<p>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.</p>		<p>change happens, and our role in this, as well as enabling us to better evidence outcomes for older women and men.</p> <p>We will take a menu-based approach to this, rather than prescribing one tool, such as outcome mapping, as we are conscious of the variety of methods and tools that can potentially support and reflect the diversity of our work. Selection of tools, and the pace at which teams are able to progress this agenda, will be locally determined, reflecting our decentralised structure, but this will be supported by our global MEAL Community of Practice (CoP) which brings together key MEAL staff across HelpAge to share and learn from each other’s and sector-wide MEAL best practices and help inform the development of our global guidance.</p>
4.2	<p>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).</p>	<p>Fully accept</p>	<p>A profile of all network members with contact details is included on HelpAge’s website, and a list of affiliated network members appears in our Annual Report each year. In December 2018, we launched a new network database as an internal tool to support staff to work with, through and for the network. This contains comprehensive information on all members, including prospective and disaffiliated members. We will display some of this information via an interactive map on the Knowledge Platform in a second phase of development.</p>
4.3	<p>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</p>	<p>Fully accept</p>	<p>All our advocacy processes include a monitoring and evaluation plan which aims to assess and articulate the results of our advocacy and influencing efforts on advocacy targets, for example, in our work towards a UN convention for older people. The evaluation accurately highlights, however, that we could do more to strengthen this. There are multiple qualitative steps towards influencing agendas that may not be well reflected in our current global reporting mechanisms, which tend to focus on numbers and outputs, though policy change is usually a long-term process, often resulting from multiple change pathways, which makes attribution to HelpAge and network efforts a continuous challenge. Addressing</p>

	<p>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.</p>		<p>this recommendation will require a period of transition. Our Strategy 2030 business planning process will provide space and time to consider this as we develop our new results framework for 2020-20.</p> <p>As per responses to Recommendations 3.2 and 4.1, we will be embedding an outcomes approach to our advocacy and influencing work within our broader organisational MEAL framework. Our Global Advocacy, Ageing and Campaigns team (GAAC) has taken steps towards this in its work on a global Advocacy Framework but, depending on the scale of adjustment required to implement this, further investment in or allocation of dedicated capacity to support this may be needed.</p>
<p>5. Strengthen HelpAge's learning approach</p>			
<p>5.1</p>	<p>Having more opportunities for peer learning for local level structure 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, OPSHG, 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.</p>	<p>Fully accept</p>	<p>HelpAge is passionate about learning, which is one of our four core organisational values. We facilitate learning between staff, Network Members, implementing partners and other key stakeholders at multiple levels (including community-level, eg in Myanmar) and across countries and regions, including through peer exchanges on technical/thematic areas of work, and regional and global conferences. Much of this is published online and made more widely available beyond those directly involved.</p> <p>A core function of our network secretariat role is to enable and facilitate members to learn from each other. HelpAge organises conferences and workshops at regional and global level to provide a platform for network members and other key external stakeholders to exchange and learn from each other on different thematic and policy areas.</p> <p>Facilitation and generation of learning through our work with others will continue to be an important part of HelpAge's role as a Network secretariat and programme implementor. We would be happy to explore new approaches to this, including those recommended by South Research.</p>

	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.		
5.2	<p>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.</p>	Fully accept	<p>We accept that more work is to be done to achieve the objectives of thematic learning groups as vehicles for Network learning and knowledge exchange. Whether these groups are generating new insights or simply sharing existing knowledge, and whether they should be targeted at global or regional level learning, are valid questions which groups will continue to explore as they develop further. These will also be questions for our strategy development process to consider in terms of any future investment required to support Network learning.</p> <p>Some groups have only recently formed, eg on Disability Inclusion, so have still to develop their role. Other groups – eg on Social Protection, Gender, and Protection, Violence and Abuse – have recently captured and published, or will shortly publish, key learning outputs (eg Voice and Accountability in Social Protection: Lessons from Social Pensions in Africa, December 2018). These groups are proving their value in terms of growing staff and Network Member engagement. Thematic learning groups will continue to facilitate peer-to-peer learning and exchange of knowledge and ideas within both HelpAge and the network. As the quality of our outcome reporting improves at all levels, this will also facilitate opportunities for sharing, capturing and communicating learning within and across groups.</p> <p>Using the results of the recent Network Mapping Survey – which only emerged towards the end of this evaluation – we will shortly be looking to reach out to new Network Members with identified areas of thematic interest and/or expertise, to drive up their engagement in learning group activity and opportunities to exchange. Investments have been made this year to support the further development of our Network-facing Knowledge Platform (KP) to enhance this. Further investment will be made in 2019/20, including a Knowledge Management Coordination function which will work across learning groups and facilitate use of the KP across HelpAge and the Network.</p>