Manual for MIPAA plus 10 Bottom-Up, Participatory Approach

"The Voices of Older Persons"

A contribution to the State of the World's Older Persons 2012

HelpAge International

July 2011

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A note upfront

This manual has been developed by HelpAge International, in close collaboration with the United Nations Population Fund (UNFPA), to guide organisations and individuals at national and local level that are contributing to the work leading to the *"State of the World's Older Persons 2012"* Report. The focus of this exercise is to explore experiences, perceptions, fears and hopes of older persons around the world. The research conducted with older people will comprise a major input for the report which is a joint publication by UNFPA and a number of UN agencies, including the UN Programme on Ageing and the World Health Organization, as well as international organisations, including International Federation on Ageing. The publication will be presented to the United Nations Commission for Social Development in February 2013 when the Madrid International Plan of Action on Ageing will be officially reviewed.

For any questions relating to this manual or the project in general, please contact the global project coordinator, Ina Voelcker (ivoelcker@helpage.org).

Introduction and summary

This is a manual for the bottom up, participatory review of the Madrid International Plan of Action on Ageing (MIPAA) with older people. It has been developed by HelpAge International to guide the many partners that will be conducting the review with older persons to allow for systematic compilation and comparison of results across countries.

As the 10th anniversary of MIPAA approaches, the United Nations Population Fund (UNFPA) and HelpAge International are working towards the publication of the *"State of the World's Older Persons 2012" Report.* This will provide a unique opportunity to ensure that older people's voices from around the world are heard and acted upon.

In 2010 a desk-based review of national implementation of MIPAA was undertaken via a review of policies, legislation, institutional arrangements, research and data. This assessment is being followed by this assessment of older people's awareness of MIPAA, their knowledge of and engagement with regional implementation strategies and national actions linked to MIPAA implementation, and the impact of national actions relating to MIPAA on older people.

The purpose of this paper is to support the planning and conducting of the review to elicit the views and responses of older women and men on the impact of national actions which relate to the key provisions of MIPAA in its three priority directions: a) older persons and development, b) advancing health and well-being into old age and c) ensuring enabling and supportive environments.

This review includes a number of activities explained below:

1) **Community profiles:** Collect information to describe each community in which the group discussions (see 3.) will happen. Guidelines and a chart to collect this information are provided on p.13.

2) **Participant profiles:** Collect information on some basic socio-demographic data and initial insights into older people's perceptions. This information will be collected for each participant of the group discussions. Guidelines are given on p.14 and the questionnaire to collect the information is provided in **Annex 1**.

3) **Group discussions:** Collect information on the key provisions of MIPAA through group discussions with older people in two rural and two urban settings. Each group should consist of not more than 6-10 older people (men and women). Guidelines are given on p.15 and a topic guide with further guidance for the facilitator is provided in **Annex 2**.

4) **Testimonies:** Collect stories of two older people per country in form of a short video testimony and a written testimony on age discrimination and rights violations, illustrated by photographs of the older person. The **"Testimony Manual"**, which is a separate manual, gives guidelines and examples for the collection of these testimonies.

5) **Analysis and preparation of outputs:** Allow a few days for analysis and preparation of all outputs. You will find guidelines and a grid to help you with the

analysis in this manual. *(More guidelines and examples will be provided in due course.)*

6) **Presentation:** Give feedback to the community and other audiences. It is good practice to present a summary of the findings to the participating communities during an informal gathering. This also helps you to consolidate findings for future presentations and to receive verification from the community. You can also use the findings to formulate any policy asks for advocacy/campaigns.

Outputs [in English] of these activities at country level include:

1) Four completed community profile charts

2) A summary of the participant profiles (1-2 pages)

3) Copies of all completed participant profile questionnaires

4) A summary of findings (2-4 pages)

5) A completed group discussion analysis grid with quotes and notes from the group discussions

6) A 1-3 minutes video testimony and a written testimony with about 5-10 photographs of the older person

Once gathered and analyzed, the outputs of this study, which constitutes a key approach for delivering on the bottom-up participatory review and appraisal process[1], will be an important part of the *"State of the World's Older Persons 2012"* Report. The report will be presented to the United Nations Commission for Social Development in February 2013 at which the Madrid Plan's review and appraisal will be discussed.

Aims of the study

- To provide authentic older people's voice on the implementation of MIPAA

- To offer a global vision of what needs to be done to ensure the full implementation of the Madrid International Plan of Action on Ageing everywhere

Objectives of the study

- To assess the effectiveness of implementation of MIPAA priorities at the local level

- To identify the gaps between government action and older persons' quality of life in respect to the priority of MIPAA[2]

- To indicate recommendations for future action on ageing

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[1] United Nations, Guidelines for review and appraisal of the Madrid International Plan of Action on Ageing, Bottom-up participatory approach, New York, 2006

[2] Gaps will be identified by comparing the results of the desk-based review of government action and the results of this study.

Background

The Madrid Plan and its review and appraisal

The Madrid International Plan of Action on Ageing and its Political Declaration were adopted in April 2002 by the 159 governments which attended the Second World Assembly on Ageing in Madrid. MIPAA is a comprehensive, detailed and aspirational document which sets out a full range of issues connected with ageing and recommends priority directions, issues and actions to address them (see Box 1). The Madrid Plan is <u>not</u> an international instrument that is binding on its signatories. A 'bottom up review and appraisal' process has been agreed by the Member States of the United Nations (UN) to assess progress in implementation. Since it is comprehensive, it does not assign priorities to its objectives.

Key to its implementation, however, is the building of local, provincial and national policies to respond to discrimination on the basis of age. In the words of Kofi Annan, Secretary General of the UN at the time of the endorsement of MIPAA, "[…] its real test will be implementation. Each and every one of us, young and old, has a role to play in promoting solidarity between generations, in combating discrimination against older people, and in building a future of security, opportunity and dignity for people of all ages."[3]

Thus the aim of MIPAA is to "build a society for all ages" across all regions of the world. It looks at issues of ageing in developing countries as well as in developed countries. For the first time agreements made by governments, linked questions of ageing to existing frameworks for social and economic development, and human rights including the poverty reduction target of "reduc(ing) the proportion of persons living in extreme poverty by one half by 2015".[4]

The additional thrust of MIPAA is that of mainstreaming, i.e. the integration of older persons' issues into wider national policy making. Mainstreaming is intended to lead to the integration of the needs of persons of all ages into the wider policy making process.

Box 1: The Structure of the Plan

> Under each of the Priority Directions there are a number of issues, and recommendations for actions – as follows:
>
> **<u>Older persons and development</u>**
>
> Issue 1: Active participation in society and development (2 objectives, 13 actions)
> Issue 2: Work and the ageing labour force (1 objective, 14 actions)
> Issue 3: Rural development, migration and urbanization (3 objectives, 20 actions)
> Issue 4: Access to knowledge, education and training (2 objectives, 14 actions)
> Issue 5: Intergenerational solidarity (1 objective, 7 actions)
> Issue 6: Eradication of poverty (1 objective, 8 actions)
> Issue 7: Income security, social protection/social security and poverty prevention (2 objectives, 13 actions)
> Issue 8: Emergency situations (2 objectives, 18 actions)

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[3] United Nations, Political Declaration and Madrid International Plan of Action on Ageing, New York, 2003, page v, Foreword

[4] United Nations, Political Declaration and Madrid International Plan of Action on Ageing, New York, 2003, p. 23, paragraph 48, Objective 1, action (a)

> **Advancing health and well-being into old age**
> Issue 1: Health promotion and well-being throughout life (3 objectives, 27 actions)
> Issue 2: Universal and equal access to healthcare services (4 objectives, 22 actions)
> Issue 3: Older persons and HIV/AIDS (3 objectives, 9 actions)
> Issue 4: Training of care providers and health professionals (1 objective, 3 actions)
> Issue 5: Mental health needs of older persons (1 objective, 10 actions)
> Issue 6: Older persons and disabilities (1 objective, 10 actions)
>
> **Ensuring enabling and supportive environments**
> Issue 1: Housing and the living environment (3 objectives, 17 actions)
> Issue 2: Care and support for caregivers (2 objectives, 14 actions)
> Issue 3: Neglect, abuse and violence (2 objectives, 12 actions)
> Issue 4: Images of ageing (1 objective, 8 actions)

Since 2002, the United Nations has produced a number of additional guides for Member States to add impetus to the implementation of the Madrid Plan, such as the 'Guide to the National Implementation of the Madrid International Plan of Action on Ageing'[5]. Member States decided that the review and appraisal of the Plan should be "participatory, bottom up and flexible".[6] In 2007, the United Nations conducted a first review and appraisal, looking at the progress made as per the 'Guidelines for review and appraisal of the Madrid International Plan of Action on Ageing'.[7] This document provides guidance to governments on how to implement the bottom up approach.

For the 10-year anniversary of the Plan in 2012/2013, the UN agreed upon modalities for the second review and appraisal[8]. The theme for this second review is the "Full implementation of the Madrid Plan of Action on Ageing: social situation, well-being and dignity, development and the full realization of all human rights for older persons"[9]. While the second review and appraisal will be conducted at the fifty-first session of the Commission for Social Development in 2013, preliminary findings of the review will be presented at the fiftieth session of the Commission for Social Development in 2012.[10] As governments prepare for this review, the programme of work outlined below will promote the active engagement of older people in the national bottom up approach.

Rationale for this approach

The participatory, bottom-up approach ensures that the voices and experiences of older women and men are heard and listened to; which is anticipated to lead to more age-sensitive national policy making. This approach acknowledges that older people have the capacity, capabilities and legitimacy to contribute to society and reinforces the need to facilitate their participation in decision making processes.

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[5] http://www.un.org/esa/socdev/ageing/documents/papers/guide.pdf

[6] http://www.un.org/esa/socdev/ageing/documents/MIPAA_frmwrk.pdf

[7] United Nations, Guidelines for review and appraisal of the Madrid International Plan of Action on Ageing, Bottom-up Participatory Approach, New York, 2006

[8] United Nations, Commission for Social Development, E/CN.5/2011/7, 2010

[9] United Nations, Commission for Social Development, 48th session, Resolution, E/CN.5/2010/L.6, 2010, paragraph 17

[10] United Nations, Commission for Social Development, 49th session, Draft resolution, E/CN.5/2011/L.13, 2011, paragraphs 9-10

The variety of methods applied in this study allows for an in-depth analysis of older people's voices and experiences. The participant profiles provide the opportunity to collect quantitative information on some basic questions related to ageing. Ideally, this survey will be conducted before the group discussions happen as this ensures that the responses given are as unbiased as possible. Furthermore, replying to these survey questions will allow that participants to get an insight into the topic before they discuss it with their peers during the group discussion.

The group discussions are a method to gain an in-depth understanding of the views and experiences of older people. Views of participants can be corroborated as well as challenged by other participants. The opinions expressed in group discussions may be more realistic than those articulated in individual interviews.

The testimonies, collected as outlined in the separate "Testimony Manual", are a good tool of learning about older people's views in more depth. In addition to the group discussions, semi-structured interviews allow to acquire a better understanding of relationships, locations, emotions, stories, encounters as well as beliefs and values.

Work plan, roles and responsibilities

HelpAge International

HelpAge International (the global project coordinator) is taking the primary responsibility for coordinating the group discussions. This role entails the following responsibilities:

- Overall organisation and direction of the project
- Prepare methodology (includes two pilots) and present to/discuss with partners
- Lead on the strategic development and implementation of the methodology including the data collection instruments
- Provide technical and operational support to partners as required
- Develop MIPAA introductory material and in collaboration with partners material on national action on ageing
- Draw up indicators according to older persons' experiences, rights and needs
- Ensure that deadlines are met and the objectives are in line with the work
- Collate material to go into the writing, editing and publication processes of *"State of the World's Older Persons 2012"* Report
- Prepare final report of the project for UNFPA

Implementing partners[11]

Partners will be responsible for all phases of the study at country level, including:

a. collection of community and participant information,

b. preparation and actual conduct of the discussions,

c. collection of the testimony material as outlined in the separate "Testimony Manual",

d. analysis of information obtained from older persons,

e. presentation of outputs to older people and other audiences, and

f. preparation and submission of outputs to global project coordinator, Ina Voelcker (ivoelcker@helpage.org) by October 15, 2011.

The work plan in Box 2 provides details on the specific responsibilities. Further details are given on the following pages.

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[11] Please note that through generous support from UNFPA, HelpAge International supports activities in 18 low- and middle-income countries. The work in country is done by HelpAge country offices and the wider HelpAge network. In addition to this, other organisations are invited to join this initiative by applying this methodology to their countries and sharing the outputs with HelpAge International by October 15, 2011.

Box 2: Work plan

July – October 2011 Invite older persons for the group discussions Collect information through participant profile questionnaire (see **Annex 1**) Conduct four group discussions per country (2 urban/2 rural; topic guide see **Annex 2**) Collect a video testimony and one written testimony with photos (2 testimonies per country; see separate "**Testimony Manual**") Complete group discussion analysis grid with notes and quotes of the four group discussions (see **Annex 3**) Analyse group discussion material Return to communities to share outputs Share material at national level Share all outputs with HelpAge International (15/10/2011)	**All partners**
November/December 2011 Analyse outputs of all partners and prepare report for inclusion in the "State of the World's Older Persons 2012" Report Finalize and submit inputs, as they come in to lead agency (i.e. UNFPA)	**HelpAge International**

Preparation for the study

1. **Selection of facilitators:** The **lead facilitator** who moderates the group discussions should not be too intrusive and should rely on a rather unstructured setting for the discussions to elicit the opinions, views and perspectives of the participants. He/she should have experience in participatory methods and working with older people.

   The **assistant facilitator** is responsible for the voice recording of the group discussions and the note taking. He/she should take as much and as detailed notes as possible. He/she needs to be experienced in taking notes in situations where more than one person might talk at once.

2. **Selection of communities:** Select two rural and two urban communities in different parts of country. Consider criteria such as location, size, access to services, religion/culture etc. to give a diverse selection as possible.

3. **Selection of participants:**
   - 6-10 older people
   - Various ages (All being pension age or 60 years and over. Ensure a good spread of different ages and ensure people aged 80 years and over are included. Take the age structure of your country into account.)
   - Gender balance (Again make sure to reflect the ratio of men and women in the country.)
   - Have one group with members of older people's groups and one with older people that are not active in such groups in both rural and urban areas. This ensures to include the most marginalised older people and that those have a voice that are not usually heard as this is the spirit of the bottom-up approach.

4. **Material** (***** indicates that translation will be required unless the study will be undertaken in English):
   - Community profile chart (1 per community, Box 3)
   - Participant profile questionnaire***** (1 per participant, **Annex 1**)
   - Group discussion topic guide***** (**Annex 2**) and paper for note taking
   - Group discussion analysis grid (**Annex 3**)
   - Testimony Manual (see separate file for details)

5. **Technical equipment:**
   - Voice/tape recorder for recording of group discussions and case study
   - Photo camera for group discussions and case study
   - Video camera (and tripod) for recording of video message
   - Charged batteries
   - Flip paper and pens

6. **Logistics:**
   - Select venue (quite and easy accessible for participants)
   - Transport for group discussion participants (if required)
   - Refreshments for group discussion participants

Guidance on the different activities

Activity 1: Community profile

Collect information on all four communities at any time during the study. Use the following chart (Box 3) for each community. Please give a number to all communities reflecting if they are urban or rural (i.e. R1, R2, U1, and U2). This community number will help you with the analysis of the findings.

Box 3: Community profile chart

Country: _____ **Region/province:** _____ **Community number** (e.g. R1, R2, U1, U2): _____ **Name of community:** _____	*Please keep this space free.*
1. Approximate number of households	
2. Population size (estimate if necessary)	
3. Percentage of population aged 60 years and above (estimate if necessary)	
4a. Number of health centres in the community	
4b. If there are none, how far is the nearest?	
5. Main source of drinking water for majority of population	
6a. Main sources of livelihood for men	
6b. Main sources of livelihood for women	
7. Additional info (e.g. resettlement area, risk of emergencies, amount/type of activities by CSO/development partners, predominant faith/religion)	

Use this description when you write up the findings for your national advocacy work.

Activity 2: Participant profile

Please collect participant profiles with all older people who have agreed to participate in the group discussion. This will take about 45 to 60 minutes. Ideally do this beforehand while selecting the participants. If this is not possible do it after the group discussion. If the older people are highly literate, the facilitator can read out all questions and all older people can complete their own forms simultaneously. If you do this, please ensure that the participants do not share/discuss their answers. The questionnaire is provided in **Annex 1**.

If you decide to collect the information while you are selecting participants, you may want to use the statement provided in Box 4 to introduce yourself and this study to all potential participants.

Box 4: Introductory statement for all activities

> o   Our names are … and we are from … (name of organisation). We are working with HelpAge International and the United Nations Population Fund (UNFPA) to learn more about the situation of older persons and how this might have changed over the last 10 years. This work will culminate in a global report on the 'State of the World's Older Persons 2012' to which many other United Nations and other international organizations are contributing. Many older people from different countries are contributing to this project, which will be presented at the Commission for Social Development in 2013. The report will also be presented at international meetings to see how the lives of older people have changed and what needs to be done to improve things.
>
> o   To capture what the situation of older people is we are inviting 6-10 older people of this community to take part in a discussion. We are interested in your views on aspects of your lives, such as health, work and how well you feel supported.
>
> o   We will not use your names in any report and what you say will remain anonymous. It is very important to us to hear from your experiences and we want you to feel able to speak freely. Please note that your participation is voluntary and that you can withdraw from participation at any time.
>
> o   The discussion will take about 3 hours – with a break.
>
> o   Before you decide if you would like to participate, do you have any questions about anything I just said?
>
> o   …

If you need to translate the questionnaire, please note any questions that were challenging to translate. Try to print every question and its answer options on one page; do not split questions over two pages.

Please number all participant profile questionnaires on the front page (e.g. 1-40). Also note the community number (i.e. R1, R2, U1, U2) on the front page. This will facilitate the later analysis. Once you have completed all participant profiles and done all group discussions, you can analyse the information.

Produce a one to two pages participant profile summarising the information of all questionnaires. Focus on the socio-demographics of the participants and any other questions you think are particularly important in the context of your country.

Activity 3: Group discussions

Summary

Please carry out <u>four</u> group discussions with your selected older people in the two rural and two urban communities. Use the group discussion topic guide in **Annex 2** to guide your discussions. This outlines an introductory and concluding session and provides key questions for six main themes:

> Introductory session: Knowledge of MIPAA & national policy [all groups]
>
> 1. Contributions & participation (ca. 1 hour)
> 2. Secure income & work (ca. 1 hour)
> 3. Health & care giving (ca. 1 hour)
> 4. Discrimination & rights (ca. 1 hour)
> 5. Housing & environment (ca. 15 minutes)
> 6. If relevant, Emergencies (ca. 15 minutes)
>
> Conclusion: Further information about MIPAA [all groups]

Preparation

Share themes

In order to generate deeper insights, it will not be possible to cover all six themes with all four groups. To enable themes to be discussed in depth, share the themes once between the two rural groups and again between the two urban groups. This will enable you to cover all the themes between the two rural settings and all the themes between the two urban settings. In this way, each group will discuss three themes as well as introductory and concluding sessions.

The theme on <u>Emergencies</u> can be discussed in countries with on-going or recent experience of emergencies, and omitted in countries where it isn't relevant.

This is an example of how to split the themes, but you decide how to share the themes:

Box 5: Example how to split themes

1st <u>rural group</u>	2nd <u>rural group</u>
Introduction: Knowledge on MIPAA and policy	Introduction: Knowledge on MIPAA and policy
Contributions & participation	Secure income & work
Housing & environment (if relevant, emergencies)	Housing & environment (if relevant, emergencies)
BREAK	BREAK
Health & Care giving	Discrimination & rights
Conclusion: MIPAA & feedback	Conclusion: MIPAA & feedback

Share all themes in the same manner again between urban groups. Please go through the topic guide and prepare the flips according to your structure.

Timing

Please allow about three hours for one group discussion. You will need about an hour to discuss each theme. Some themes may take longer than an hour and others less, so be flexible. We suggest that you organise your discussion in two parts, with a refreshment break in the middle. Be sensitive to participants' mood: conclude discussion or take a break when they are tired. Plan with participants for half a day of their time.

Remember that, if you haven't done so yet, you will also need to complete the participant profile questionnaires with all participants. This will take 45 to 60 minutes.

Preparing for the discussions

Some themes, because of their complexity, provide many questions, and you will not have time to investigate all of them in the depth required. Please review the questions before each group discussion and prioritise those that are most relevant and important in your context. Remember, you do not have to cover all the questions or ask them in any particular order. It is more important to generate discussion that leads to <u>new and in-depth insights</u>.

Take time to read the questions before the group discussions and ensure you understand the concepts and that you can explain them in your own words to the group. Be flexible and when necessary use your own words to ensure the group understands the topic/questions.

Materials

- Group discussion topic guide (**Annex 2**) & paper for notes

- Flips with translated statements for discussion. Participants will be asked to discuss various statements during the discussion. If participants read, please write these statements clearly on separate flips. (See <mark>highlighted in green</mark> in right hand column of **Annex 2**)

- A hard copy of MIPAA and any other materials on MIPAA for introductory and concluding sessions

- Tape recorder, camera, video if you have permission to use them

Facilitating and recording

We wish to explore themes in more depth than before and a relatively small group makes this more manageable. Try to encourage the group to consider deeply and to discuss with each other – rather than responding to you in turn. Note any new issues coming out of the discussion. Bear in mind that not everyone needs to respond to each question. Ensure that discussion is not dominated by one or two persons.

- To encourage deeper analysis - "Why is that?"

- To encourage discussion - "Please tell us more about that."

New issues

Issues that are not in the guide, for example, debt or child labour may be central to the theme in question – allow these to be explored. Note new issues down and crosscheck in other group discussions.

Note taking

Good notes will save time and help you with analysis. Organise your notes with sub-headings for each main question and new issues. Record exactly what people say, so that you end up with a script of quotes. You won't be able to record every word but try to capture important, surprising or minority responses. It is useful to use margins at each side of your notepaper – to note initial of speaker (for gender analysis) and to note questions for follow up.

Teamwork

Facilitators work as a team. While lead facilitator asks the open questions and guides the whole discussion, the note-taking facilitator can also ask follow up questions, pick up on new issues and help with timing. Feel free to talk with each other during the session – to prioritise when time is running out or to crosscheck something.

If your resources permit, allow for a team of four; one lead facilitator, one note taker, one assistant (e.g. for flips, voice recordings, drinks, unexpected events) and one photo-/videographer.

After each discussion

Facilitators should sit together as soon as possible after each discussion to reflect on the information and review their notes. Make brief notes on:

- key issues – disagreements & consensus
- any gender differences
- new issues, surprising and unclear points for follow up
- significant changes for older people over the last 10 years

Keep these notes to use for the summary of findings and the group discussion analysis grid.

Activity 4: Testimonies

As outlined in the "Testimony Manual".

"This manual provides guidelines to collect video and written testimonies on issues of age discrimination (or discrimination in old age). Both methods are one of the most direct, engaging and effective ways to bring older people's voices to a global platform. These are key tools in giving voice to older people across the globe to tell a story in their own words."

Activity 5: Preparation and analysis of material

Once all material has been collected through activities 1 to 4 it can be analysed. Please try to schedule a few days for analysis and write up to get the best out of all material you collected. The preparation and analysis of material includes several steps for each of the activities as described below:

1. Summarise information of the community profile sheets for your own use (see Activity 1)

2. Summarise the information of all participant profile questionnaires (see Activity 2)

3. Summarise findings of the four group discussions (see below)

4. Complete group discussion analysis grid with all notes and quotes from the group discussions (see below & **Annex 3**)

5. Edit video testimony, write up written testimony and select photographs (see "**Testimony Manual**")

Remember that these materials need to be in English.

Analyse the group discussion material…

… write a **summary** of all four group discussions (2-4 pages). Use your summaries of each discussion and the following questions to guide you:

- What are the key issues raised in most communities? Give details, don't just mention the theme but give details of this issue and why it is so important in this context.

- What are significant differences between the rural and urban communities, if any?

- What are significant differences between groups composed of active members of older people's groups and non-active members of the community, if any?

- What are new issues or surprising findings?

- What are the key changes for older people, if any, that occurred over the last 10 years? Mention both, good and bad changes.

… using the **group discussion analysis grid** (**Annex 3**). Fill in the analysis grid with your hand-written notes and quotes from the voice recordings of all four group discussions.

- Look at the group discussion topic guide (**Annex 2**) and give information on all the questions you discussed under each theme.

- Write down your own notes from the group discussion and then from the voice recordings. Listen to the voice recordings and while you do so fill in the grid.

- When completing the grid, highlight key issues and similarities as well as differences between the communities in the right hand column of the grid.

For you own use, you may want to keep the details and produce a report bringing together the different components. While the community and participant profiles will be

used to describe the background of the participants, the group discussion material should build the core of the report. To illustrate these findings you can use the testimony material and the photographs taken during the group discussion and collection of the testimony material.

Activity 6: Sharing and presenting of findings in country

When you finished the analysis and collected the case studies, you may wish to share the findings with the participants in the communities. This is good practice as this gives them a sense of inclusion and gives you the opportunity to practice sharing of findings and to validate your findings.

In addition, this rich material can be used for any public events, campaigns or meetings on any of the themes, and to feed it into the official MIPAA review and appraisal process in your own country.

Outputs

Please share the outputs as outlined on p.5, with the global project coordinator, Ina Voelcker (ivoelcker@helpage.org) by **October 15, 2011.**

Thank you!

Please contact me if you have any questions or suggestions.

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ANNEX

1. Participant profile questionnaire

Participant profile questionnaire

Please number these participant profiles (e.g. 1-40) and write down the community number (i.e. R1, R2, U1 or U2).

Community number: _____   **Participant number: _____**

Please note the instructions in brackets. Sometimes you won't need to ask the older person but you can reply based on observation.

If you change your mind and need to tick another box, please block out the box that you don't want to tick and tick the one you would like to choose.

PART A: Socio-demographics and living arrangements

1) How old are you? *(You might need to refer to historical key events and ask how old they were at that time. Tick one box only.)*
   - ☐ Under 60 years of age
   - ☐ 60-64
   - ☐ 65-69
   - ☐ 70-75
   - ☐ 76-79
   - ☐ 80-85
   - ☐ 85-89
   - ☐ 90 years of age and over
   - ☐ Don't know

2) How many adult children do you have? *(Write down the number of adult children.)*
   ____

3) How many grandchildren (and great-grandchildren) do you have? *(Write down the number of grandchildren and great-grandchildren.)*

   ____

4) Are you ...? *(Tick one box only.)*

☐ Married

☐ Single

☐ Widowed

☐ Other (State here.)

☐ _____

5) Sex *(Complete by observation. Tick one box only.)*

☐ Male

☐ Female

6) Over the last month, did you do any work to get money? *(Tick one box only.)*

☐ Yes (Give details.) _____

☐ No

☐ Don't know

7) How would you describe your current health status? *(Tick one box only.)*

☐ Very good

☐ Good

☐ Fair

☐ Bad

☐ Very bad

☐ Don't know

8) What is the highest level of schooling you completed? *(Tick one box only.)*

☐ Less than three years schooling

☐ Primary School

☐ Secondary School

☐ College or University

☐ Don't know

9) Are you the owner of the house you live in? *(Tick one box only.)*

☐ Yes

☐ No

☐ Don't know

10) Who lives in your home with you? *(Tick all that apply.)*

- ☐ No one else but me
- ☐ Spouse or partner
- ☐ Children
- ☐ Grandchildren
- ☐ Other relatives
- ☐ Non-relatives

Total number of people in your household: _____

11) Which support do you (or another household member) currently receive?

(Several answers are possible.)

- ☐ Old age pension
- ☐ Disability grant
- ☐ Unemployment grant
- ☐ Child support grant
- ☐ Maternity grant
- ☐ Vulnerability grant
- ☐ War veteran grant
- ☐ Other _____

ADDITIONAL QUESTION 1:

Which of these best describes you? *(Tick one box only.)*

- ☐ No religion
- ☐ Buddhist
- ☐ Christian
- ☐ Hindu
- ☐ Jewish
- ☐ Muslim
- ☐ Sikh
- ☐ Any other religion _____

12) Are you involved in any kind of older persons'
organisation/club/association/group? *(Tick one box only.)*

    ☐   YES

    ☐   NO

    ☐   Don't know

PART B: Insights on Ageing

Please explain what "age discrimination" is.

Age discrimination is treating somebody less favourably because of his/her age.

These are some examples:

- Losing your job because of your age
- A doctor deciding not to refer you to a consultant because you are 'too old'
- Finding that an organisation's or individual's attitude to older people results in you receiving a lower quality of service
- Being refused loans, insurance, banking services etc because of your age

13) Do you believe age discrimination, a different treatment of a person simply because of age, exists in general in the daily life of older people? *(Tick one box only.)*

    ☐   YES

    ☐   NO

    ☐   Don't know

14) Have you experienced age discrimination over the last 12 months? *(Tick one box only.)*

    ☐   YES

    ☐   NO

    ☐   Don't know

15) To what extent do you feel that people treat you unfairly? Please select the answer that best describes your feelings. *(Tick one box only.)*

    ☐   Not at all

    ☐   Not much

    ☐   To some extent

    ☐   Quite a lot

    ☐   A great deal

16) How easy do you find it to access healthcare when you need it? *(Tick one box only.)*

    ☐   Very easy

    ☐   Easy

    ☐   Neither easy, nor difficult

    ☐   Difficult

    ☐   Very difficult

17) How easily does your income pay for basic services (water, electricity, healthcare, food and decent housing)? *(Tick one box only.)*

    ☐   Very easy

    ☐   Easy

    ☐   Neither easy, nor difficult

    ☐   Difficult

    ☐   Very difficult

18) How often do you find yourself worrying about problems with money e.g. to improve your housing, health, schooling of your grandchildren etc.? *(Tick one box only.)*

    ☐   Always

    ☐   Very often

    ☐   Often

    ☐   Sometimes

    ☐   Never

19) To what extent do you feel that people treat you as an older person with respect? Please select the answer that best describes your feelings. *(Tick one box only.)*

    ☐   Not at all

    ☐   Not much

    ☐   To some extent

    ☐   Quite a lot

    ☐   A great deal

20) How often do you feel lonely? *(Tick one box only.)*

- ☐ Always
- ☐ Very often
- ☐ Often
- ☐ Sometimes
- ☐ Never
- ☐ Don't know

21) Does fear of violence affect how you go about your daily life? *(Tick one box only.)*

- ☐ YES
- ☐ NO
- ☐ Don't know

22) Are you caring for others? *(Tick one box only.)*

- ☐ YES
- ☐ NO
- ☐ Don't know

23) If you are caring for others, how many people are you caring for? *(Tick one box only.)*

- ☐ None
- ☐ One
- ☐ Two
- ☐ Three
- ☐ More than that
- ☐ Don't know

24) If you don't do any work to get money and you would be given the opportunity, would you like to be paid to work? Imagine. *(Tick one box only.)*

- ☐ YES
- ☐ NO
- ☐ Don't know

25) Do you use a mobile phone? *(Tick one box only.)*

- ☐ YES
- ☐ NO
- ☐ Other _____ (Please specify.)

26) How much control do you feel you have in making personal decisions that affect your everyday activities? *(Tick one box only.)*

- ☐ Control over all decisions
- ☐ Control over most decisions
- ☐ Control over some decisions
- ☐ Control over very few decisions
- ☐ No control at all

27) Would you like to change anything in your life? *(Tick one box only.)*

- ☐ YES
- ☐ NO

28) Who do you think contributes <u>most</u> to any change in your own life? *(Tick one box only.)*

- ☐ Myself
- ☐ My family
- ☐ My community
- ☐ The local government
- ☐ The State government
- ☐ Other (Please specify.) _____

29) Do you think your government is doing its best to make sure you lead a comfortable life in later life? *(Tick one box only.)*

- ☐ YES
- ☐ NO
- ☐ Don't know

30) Taking everything into account, how satisfied are you with the way you live these days? *(Tick one box only.)*

- ☐ Very dissatisfied
- ☐ Dissatisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Satisfied
- ☐ Very satisfied

Thank you very much for your time and openness!

2. Group discussion topic guide

SETTING THE SCENE (10 minutes)	Notes
Use this outline to introduce your discussions in all communities: *- Our names are … and we are from … (name of organisation). We are working with HelpAge International and the United Nations Population Fund (UNFPA) to learn more about the situation of older persons and how this might have changed over the last 10 years. This work will culminate in a global report on the 'State of the World's Older Persons 2012' to which many other United Nations and other international organizations are contributing. Many older people from different countries are contributing to this project, which will be presented at the Commission for Social Development in 2013. The report will also be presented at international meetings to see how the lives of older people have changed and what needs to be done to improve things.* *- Thank you for agreeing to take part in this discussion. We expect that this will take about 3 hours, and will include a break with refreshments. Please note that your participation is voluntary and you can withdraw from participation at any time.* *- We are interested in your views on aspects of your lives, such as health, work and how well you feel you are supported by the government. We particularly want to ask you what <u>changes or improvements</u> you have seen for older people in your community <u>over the last ten years</u>. We would like you to think generally about the situation of older people in your own community, including those who may be too frail to participate in this discussion.* *- After the discussions, we will return to share the findings with you (add details if possible).* *- We will not use your names in any report and what you say will remain anonymous. The information you give us is very important and we want you to feel able to speak freely.* *- We would like to ask your permission to tape record the discussion and to take photographs. You do not have to agree to either of these.* *- Do you have any questions about anything I have said?* *- Before we start let's introduce ourselves – please just give your first name only.*	It might be helpful to have small name cards that participants can place in front of them. This also helps facilitators when recording responses. It might be easier to focus, if you write this on a flip that can be kept visible during the whole discussion.

KNOWLEDGE OF POLICY / MIPAA (20-30 minutes)		Notes
To assess awareness of MIPAA, regional implementation strategies, national actions.	Have any of you heard about the Madrid International Plan of Action on Ageing? Please tell us what you know about it? Tell us <u>how</u> you came to know about this? (who, when etc) Please tell us what, if anything, your government or local government has done to improve life for older persons in the last 10 years? (any new measures, new laws, programmes, pension reform, changes in attitudes, consultations or actions to raise awareness about MIPAA) Have you been directly involved in any meetings to discuss actions to support older people, at local or national level? Please describe these. *Please discuss this statement:* "*In general, older people's views and needs are given more priority by governments now compared to ten years ago.*" Do you agree or disagree with this statement? Please give reasons. Now we would like to give you some information on MIPAA, as we would like to hear your views on some of the issues that are highlighted in the MIPAA. The Madrid International Plan of Action on Ageing is divided into three main areas, older people and development, health and well-being and supportive and enabling environments. *(Elaborate for 1-2 minutes)*	*Given the rest of the themes please do not allow more than 30 minutes. Need to ensure there is time to discuss the last statement.* ==If the group read, prepare this statement on flip. If not, read it out to them. Allow them to discuss while you take notes.== Provide some information on MIPAA (see pp.5-9). This will help the older people to understand the purpose of this discussion.

MIPAA issues	CONTRIBUTIONS, INCLUSION & PARTICIPATION (ca 1 hour)	Notes
Recognition of older persons contributions (para 21)	Please would you talk about the main contributions that you & other older people make for the wellbeing of the family / community. Please give examples of ways in which you feel such contributions are valued and supported. Give examples of when you feel older people's contributions are not recognised? Think about your contributions over the last ten years - In which ways, if any, have government programmes or laws helped you to continue making these contributions? Please give concrete examples.	Keep very brief e.g. care giving, income, pension, labour, education…
Participation (para 22)	Tell us of any experiences when you were consulted over an issue – by government or other agency. (health, housing, transport) Give specific examples. What if any change resulted from this?	e.g. improved health service, pension, transport, IG schemes, credit, education/training
	Please describe any organisations or groups that you belong to in which you are consulted on policy issues/improving services. What motivated you to join this group? What are the main achievements/change in policy?	e.g. special councils, local councils, advisory bodies, ADA campaign. Focus on groups that represent OP in wider decision making processes.

	Think about the last elections and whether you voted? If you voted, why did you feel it was important to vote? If not, what prevented you from voting? What would encourage you vote or take part in decision-making? *Or discuss the following statement:* "*There is no point in older people voting because nobody listens to older people anyway.*" Do you agree or disagree with this statement, and why? What would encourage you to take part in discussions with government about the things that are important to older people?	Chose the question that is most appropriate in the political context of country. ==Write statement on flip or read out and allow group to discuss==.

MIPAA issues	SECURE INCOME & WORK (ca 1 hour)	Notes
Employment (para 28)	Please talk about the main types of work older women & men do in this community to get money. Would you say that work is available for all OP who want to work?	Keep brief. Note formal, informal, seasonal, ad hoc, regular work. Are women & men equally able to work? Reasons.
	Thinking about the last ten years, please describe changes in the <u>availability</u> of work and <u>type</u> of work OP do.	
	Is there more or less work? Why is this?	Note changes for women and men if different
	What are the barriers to getting work?	
	Change in types of work and conditions (health risks)	
	Has the money OP get increased or decreased? Why is this?	
	What are the reasons for these changes?	
	What is the situation for younger people?	
Rural development & migration (para 32-34)	<u>Communities affected by migration</u>: Tell us about any government programmes you know about that support older people in migration households, who have little income and may care for grandchildren. What main things could the government do to support OP? Please give concrete examples.	Ask this only if relevant to community

	We'd like to know about any new laws or government programmes in the last few years that affect the ability of older people to have decent work. Please talk about <u>improvements</u> you know about or <u>new obstacles</u> for OP who want to work.	Measures that affect <u>access</u> to work and <u>quality</u> of work experience. e.g. transport, pensions, health services, access to credit, training.
	Please tell us about the ability of older people to get financial services, for example, credit, bank accounts, saving schemes. What, if any, services do/would older people use most and how do/would they benefit? How have these services improved for older people in the last few years? What prevents older people using such schemes? What can they say about household debt?	Access to financial services
Access to knowledge, education & training (para 40-41)	Please describe the main ways that older men & women get information and communicate with others. How has this changed in the last few years? What sort of information do older people want most and how could this be provided (what media – radio, print, face to face, computer…..) Please talk about any training or education schemes that you or other older people have received in the last few years. How has this improved access to work, income, quality of life? What new skills or knowledge would improve lives for older people here? What things prevent older people from continuing their education or training? What if any	

	opportunities are there for older people to help educate or train others (e.g. health workers, working with school children …)?	
Income security, social protection (para 52-53)	Income from pensions and other benefits is a vital component of security for older people. Think about the last ten years – what measures has the government made to increase or introduce new cash benefits specifically for older people? What difference has this made to OP households (ability to work, better health care, nutrition, education)?	Facilitators will already know what if any pensions and benefits are available for OP.
Poverty eradication (para 48)	Please talk about any worries to pay for basic services, food, shelter etc.

Think about when you started getting your pension – please describe the most important differences this pension income has made to your life. | For pensioners only – confidence, ability to contribute, health, care of grandchildren, etc. |

MIPAA issue	HEALTH & CARE GIVING (ca 1 hour)	Notes
Health promotion & wellbeing (para 66-68)	It is well known that the way we live when we are young (living conditions, diet etc) affects our health in old age. What factors of your childhood and adult life would you say have affected your health today, in a good or bad way? What were the main positive & negative factors? Think about the situation for young people today. Which, if any, of the factors you just described have changed for young people today? (is it better, same, worse) Think about the last ten years – what new things has the government done that has most helped older people to maintain their health in old age? (health services, information, pension & cash benefits, access to food, clean water…)	Note positive & negative factors, differences between women & men. Diet, education, work, family size, health care, smoking/alcohol use, being a minority group, lack of resources etc.
Universal & equal access to health care services (para 74-7)	Please describe the main health services that are available to older people in this community. Which of these do you use most? What, if any problems do you have in getting these services? Think about these statements: "*Health services should be freely available to everyone regardless of age.*" "*Good quality health care for older people also benefits their families and communities.*" How well is this viewpoint demonstrated in practice in your own experience? What do you think are the reasons for this?	Note any barriers – cost, transport, lack of medicines, equipment, training of health workers…women & men <mark>Write the statement on flip if OP can read, or read it out.</mark> Note whether main issues

	Please talk about your main health concerns if any. What new services or programmes would most help you with these concerns?	are chronic or infectious diseases. New services - as well as health services, this could include exercise, clean water, information, counseling, home support etc.
Older people and HIV/Aids (para 79-81)	Communities affected by HIV/Aids: It is now recognised that older people are affected in many ways by HIV & AIDS, e.g. through death of family members, becoming carers, & becoming infected themselves.. Tell us about any programmes / services in your community that help older people in any of these situations. What kind of services would most help OP in such situations – please give specific examples.	Note whether government/NGO/community based initiatives & area of focus – access to treatment ART, testing, nutrition, education, home support. How are OP included?
Care & support for caregivers (105-106)	Many older people have care giving responsibilities e.g. for sick & disabled members, for grandchildren in migrant households, for spouses. This can place huge emotional & financial strain on OP. Please describe what, if any, support is available for older carers in this community. Tell us about any programmes that specifically include OP.	Focus on the care giving that is relevant to the community. Note whether support is government or community based. Women & men.
	Now please think about any programme providing care for older people in this country/community. Think about the last ten years – what programmes has the	Note support for older people and support for carers of older people. In

	government introduced to help older people who need care in the home, community or residential care. Please mention what support, if any, is provided to those who care for older people at home.	HIV&AIDS affected communities, ask about services for OP with HIV/Aids & older carers.
Training of care providers & health professional (para 83)	Care providers and health professionals (doctors, nurses..) are better able to help older people when they have training in issues of ageing and geriatric care. What do you know about the training received by care workers and health workers in this community, & whether this included geriatrics / care of older people? Please describe any changes in health and care services for older people you have noticed in the last ten years?	In HIV/Aids affected communities, ask about training of HIV/Aids workers.
Mental health needs (para 86)	Please describe what you know about the mental health of older people in this community – this includes illnesses such as depression and types of dementia. - In general, how are older persons with these types of illness treated by members of the community? - How are older persons with mental illnesses treated by health professionals? Over the last ten years, how have services in mental health / psychiatry changed or improved for older people? How have they changed for other age groups? What programmes would help OP with mental health issues – please give concrete examples.	Ask about attitudes to OP with mental illnesses (stigma, social exclusion, association with witchcraft …) as well as treatment & care by health professionals. Ask about older women and men – are there different attitudes?
Older persons &	Please describe what your government does to help older people with disabilities (cash	Ask about attitudes to OP with disabilities – is this

disabilities (para 90)	transfers, mobility aids, training, housing adaptations, care at home....) In what way, if any, is this different for other age groups? Think about the last ten years - What, if any, improvements or new services have been introduced for OP with disabilities?	the same for all age groups?

MIPAA issue	DISCRIMINATION & RIGHTS (ca 1 hour)	Notes
Rights of older persons	We did already talk about some of the benefits you receive. Let's elaborate a little on this. Please tell us what entitlements, benefits, or services you receive from government because you are an older citizen? What, if any, problems do older persons have to get their entitlements? Over the last ten years, what new entitlements for older people have been introduced?	Entitlements in old age – e.g. pension, other cash transfer, free health care, transport, discounts on fuel, carers or guardian benefit…
	As an older person what aspects of your life do you enjoy most? What aspects of your life do you feel you no longer enjoy because of your age?	Note the main good things & 'rights' that OP enjoy now and what they no longer enjoy in old age.
Neglect, abuse & violence (para 110-111)	Unfortunately, many older people are mistreated because of their age, but this is not often talked about. Please tell us what you know about abuse of older people, for example, neglect, physical harm, emotional harm, sexual harm, financial abuse. In what situations does this abuse happen? (in the home, service providers, carers…) - What support & services, are available for older people who suffer this abuse? - What penalties are there against the people who mistreated older people? - What other measures do you know of that protect older people from abuse? - Think about the last ten years - what has your government done to reduce incidence of abuse of older people (awareness raising, training, penalties, support programmes….)? How do you know about these programmes?	Treat this topic sensitively – some participants may be victims of abuse themselves. Give examples of different types of abuse. Ask how pension has affected the level of abuse, e.g. the pension is taken away (increase of abuse) or the pension makes the older

		person "more valuable" (decrease of abuse).
Images of ageing (para 113)	How would you describe the dominant perception of older women & men in this country? Please give examples. E.g in the press, TV, radio…	
	How has this changed over the last ten years? What are the reasons for this change?	
	Please discuss the following two statements:	<mark>Write the statement on flip if OP can read, or read it out.</mark>
	"*People treat older people with respect*"	
	"*People treat older people unfairly*"	Note negative, positive, neutral overall. Gender differences. Changes over last 10 years & what factors made this change.
	Which of these two views do you feel is true? Give reasons. (You do not have to agree with others in the group.)	
Intergenerational solidarity (para 44)	"*Each and everyone of us, young and old, has a role to play in promoting solidarity between generations…*" *(Kofi Annan, 2002)*	<mark>Write the statement on flip if OP can read, or read it out.</mark>
	- Please describe any opportunities you have to socialize or work with younger adults and children apart from family members.	Encourage discussion. Participants do not have to agree with each other. Note reasons given. Note any differences between women & men.
	- What do you think are the main factors that cause misunderstanding & hostility between young and old?	
	- What government programmes or services help older and younger people to	

		understand and support each other?	e.g. poverty, migration, urbanization, education…
			e.g. pension, care giving, education, rights to work, anti discrimination laws…..

MIPPA issue	EMERGENCIES (ca 10 minutes)	Notes
Emergency situations (para 55-56)	During emergency situations (war, cold weather, earthquake, drought etc.) in your country, in what ways do OP in particular contribute their skills, knowledge & support. Please give examples – women & men. - Older people are also highly vulnerable in emergency situations. If you have experienced an emergency, what special services and relief did emergency workers provide for you and other older people? Please give examples. - what services, types of relief do you think older people should be provided with in a future emergency? Please give concrete examples. - What programmes, if any, has your government introduced to help communities prepare for an emergency? What role do older people play in these programmes? What role do you think older people who are able should play in emergency preparedness?	Refer to the particular emergency situation/s in country. E.g. peace & reconciliation, knowledge, skills, authority…

MIPAA issue	HOUSING & ENVIRONMENT (ca 10-20 minutes)	Notes
Housing & the surrounding environment (para 98-100)	Please think about the environment in which you & other OP live – your housing, access to transport, ability to get to other places. What physical barriers prevent older people from socializing and working as they want to? - Think about the last few years – what, if any improvements have been made to help OP & people with disabilities to participate in social and economic activities? - what could the government and private sector do to remove barriers and enable older people to participate more easily?	e.g. high rise accommodation, lack of electricity for lights and elevators, poor roads & paths, no transport, no wheelchair access, hills, steps, traffic etc.

FURTHER INFORMATION ABOUT MIPAA	Notes

This is an opportunity to share more information about MIPAA. Plan this session as you like, e.g.:
 	
• Share any translated information that you have produced
 	
• Questions & answer session
 	
• How MIPAA could be used by older people
 	
    o After this study
 	
    o In the ADA campaign
 	
    o Campaigns you and older people may be planning on specific issues.
	Time this session according to the time available, participants' needs and levels of concentration. If time is short, do this very briefly and organise another time when you can share this information in more detail, e.g. when you go back to feedback the findings of the group discussions.

Now complete the participant profile questionnaire with all participants if you haven't done so yet.

3. Group discussions analysis grid

Community number	Notes and voice recordings	- Key issues – disagreements & consensus - Any gender differences - New issues, surprising and unclear points for follow up
KNOWLEDGE OF POLICY / MIPAA		
R1		
R2		
U1		
U2		
CONTRIBUTIONS, INCLUSION & PARTICIPATION		
R1		
R2		
U1		
U2		
SECURE INCOME & WORK		
R1		
R2		

U1		
U2		
HEALTH & CARE GIVING		
R1		
R2		
U1		
U2		
DISCRIMINATION & RIGHTS		
R1		
R2		
U1		
U2		
EMERGENCIES		
R1		
R2		
U1		

U2	
HOUSING & ENVIRONMENT	
R1	
R2	
U1	
U2	
ANY OTHER NOTES & IMPORTANT QUOTES	
R1	
R2	
U1	
U2	