

## Terms of Reference

### Mid-Term Strategic Review of the progress of the Strategy 2030 within a changing context and sector, and an evolving HelpAge

#### 1. Background

HelpAge International is a registered charity in the UK, leading an international network focused on ageing issues and supporting older people globally.

HelpAge works with more than 200 members in 90 countries to help older people claim their rights and challenge discrimination and poverty, so that they can lead dignified, secure, active and healthy lives.

HelpAge operates through a global team with staff based across the world. Through this structure HelpAge delivers its Strategy 2030, [Ageing in a Just World](#), with a focus on four focus areas: Healthy Ageing, Income Security, Inclusive Humanitarian Action, and Society for All Ages. The Strategy serves as a 10-year strategy framework for guiding decisions on focus, priorities, investments and resource allocations in annual planning. In 2021, informed by its values, history and commitment to locally-led development, HelpAge embarked on a transformation journey through three strategic shifts: delivering value-add as a Supporter, Convener, and Thought leader, through global portfolios and a global operating platform; commitment to partner-led programming (PLP); and transition of country programmes and offices to locally-led entities. As part of this process, four focus areas were also prioritisation, as the basis for four global portfolios. (See Annual Reports for an articulation of how this is delivered in practice.)

As we approach the midpoint of the 10-year Strategy 2030 and in the context of a rapidly changing and ageing world and humanitarian and development sector, HelpAge is looking to commission an independent strategic review to assess progress made in the implementation of Strategy 2030 and how the strategy and organisational design may need to evolve within an ageing and changing world, a changing sector, and an evolving HelpAge.

#### 2. Purpose and scope

The purpose of the Strategic Review is to **assess the progress HelpAge has made in implementing its Strategy 2030 to date, and to advise if and how to evolve the Strategy and organizational design to better respond to the changing external context and sector, and an evolving HelpAge.**

At this mid-point, the Strategic Review offers an opportunity for reflection, learning and drawing out actions required to increase the well-being, dignity and voice of older people. The independently facilitated process can create an opportunity for the organization to listen to and learn from itself.

The findings of the Strategic Review will inform how to optimize the Strategy (if applicable), sharpen/evolve the Strategic Shifts, adjust organizational priorities and resource allocation, and help inform the ongoing evolving of the overall organizational design (capabilities, structure, systems, etc.).

- **Objective 1: To review the performance of the Strategy and Strategic Shifts and identify areas for improvement.**

*How have we performed in the four focus areas to improve the wellbeing, dignity and voice of older people? How have we progressed in our ambitions to be a Supporter, Convener, and Thought leader, as well as the shift to locally-led development? How have the organisational priorities, resource allocations, global platform, systems and capabilities (including evidence gathering and learning) enabled the implementation of the Strategy 2030 and Strategic Shifts? What are some of the reasons for strong and under performance? What do we seek to amplify, and which areas can be improved in the strategy and/or on how we implement?*

- **Objective 2: To assess external factors that may impact/influence changes on the Strategy and identify areas of improvement.**

*What significant external factors (e.g., political, economic, social, technological, environmental) have emerged since the current strategy was developed, and how do they impact the Strategy? How have changes in international development agendas and policies impacted the landscape in which HelpAge operates? What specific aspects of the Strategy need adapting or enhancement to better address the evolving external context and sector? How to strengthen our responsiveness to context changes and opportunities?*

**Objective 3: Informed by the findings under Objective 1 and 2, to recommend** shifts in organisation systems, process, capabilities, and platforms to deliver strategy and identify improvement *Within current and projected resources, how to strengthen organisation planning and resource allocation to become more strategy driven? How to evolve the strategic shifts to deliver Strategy 2030 (and vice versa) and optimally position HelpAge within a changing context and sector? How to adjust or further specify the current strategic shifts? What changes to organisational systems and processes are required?*

Questions are expected to be further developed in terms of scope and specific detail as part of the Expression of Interest and with the HelpAge team during the inception phase of the Strategic Review.

The primary intended users of the Strategic Review are:

- Board (in relation to Objectives 1 & 2).
- HelpAge's Executive Leadership Group (ELG) and
- Leadership Group (LG)

Additional stakeholders are:

- HelpAge staff
- Members of the HelpAge network, including supporting members (Age International, HelpAge Germany, HelpAge USA and HelpAge Canada)
- HelpAge's strategic partners (Sida, Irish Aid, WHO and UNFPA)
- Selected network members and partners

### **3. Approach and methods**

There will be two phases of the review: the inception phase and the review phase.

Inception Phase: The design, methodology and analysis will be fully developed and agreed with the selected facilitator /consultant during the inception phase and included in the inception report. Methodology must include consultations and reflection at multiple levels.

HelpAge is interested in reviewing proposals from consultants which include using participatory research techniques and/or innovative methods, which aim to minimise the extractive nature of the review and build in opportunities for network members and partners to also reflect on and inform emerging findings. The review will be based on applying a mixed method approach with quantitative and qualitative techniques.

The Inception Phase will identify specific areas of inquiry.

Review Phase: Data will be collected from leadership, staff, network members, partners, Supporting Members, strategic partners and other stakeholders depending on the review questions.

HelpAge will provide contacts for key stakeholder consultations.

It is envisaged that the review will adopt interactive and participatory approaches involving the use of mixed methods. The consultants will propose and design a suitable methodology in line with the objectives and questions.

The review will be utilisation-focused, which means the consultants will facilitate the entire process with careful consideration of how all components and actions will affect the use of the review.

The Strategic Review will formulate findings, underpinned by supporting material and analysis. For each, a set of recommendations will be presented for consideration.

### **4. Practical arrangements**

This Strategic Review is commissioned by HelpAge International. The sponsor of the review is the CEO.

The intended primary users are Executive Leadership Group, Leadership Group, and Board.

The process will be guided by a Steering Group. It will approve the inception report and the final report of the review and provide feedback and reflections at key stages of the process, including ensuring the recommendations are grounded and within available and projected resources. The Steering Group will participate in the start-up meeting of the Strategic Review, as well as in the debriefing/validation workshop where preliminary findings and conclusions are discussed.

The lead will be responsible for keeping the various stakeholders informed about the Strategic Review and HelpAge's management response to its findings and recommendations.

## 5. Time schedule

The Strategic Review is planned to be carried out between October 2024 and January 2025.

The timing of interviews will be agreed with the contracted consultant in dialogue with the main stakeholders during the inception phase.

A more detailed schedule of key deliverables for the process will be agreed at inception with the consultant.

## 6. Deliverables

- a) Start-up Meeting: To be held with Steering Group.
- b) Inception Report: The inception report will form the basis for the continued review process and shall be approved by HelpAge International before the process proceeds to implementation. The inception report should be written in English and cover areas of inquiry, present the approach/methodology (including how a utilization-focused and gender responsive approach will be ensured), a stakeholder mapping, consultative process, methods for data collection and analysis (including any relevant frameworks) as well as the full design. The report should spell out how an inclusive approach and analysis will be assured. A clear distinction between the approach/methodology and methods for data collection shall be made. All limitations to the methodology and methods shall be made explicit and the consequences of these limitations discussed. A specific time and work plan, including number of hours/working days for each team member, for the remainder of the review should be presented. The time plan shall allow space for reflection and learning between the intended users of the Strategic Review. The inception report should outline an approach to select and prioritise specific areas for inquiry, balancing focus and a holistic analysis.
- c) Data collection tools: Develop the data collection tools and set of workshops and have them approved by HelpAge International and partners before data collection, analysis, interpretation.
- d) Draft report: The firm/consultant will prepare a draft report with details of findings, recommendations and lessons learnt for review by HelpAge International.
- e) Validation workshop: Hold a validation workshop/meeting with relevant HelpAge programme staff and stakeholders as part of the validation and feedback. This includes specific engagement with the HelpAge Board and Executive Leadership Group (ELG).
- f) Final report: The final report shall be written in English with a clear structure. The report should not exceed 25 pages (excluding annexes) and the executive summary should be a maximum of 3 pages. The approach/methodology and methods for data collection used shall be clearly described and explained in detail and a clear distinction between the two shall be made. All limitations to the methodology and methods shall be made explicit and the consequences of these limitations discussed. Findings shall flow logically from the data, showing a clear line of evidence to support the conclusions. Conclusions should be substantiated by findings and

analysis. Recommendations and lessons learned should flow logically from conclusions. Recommendations should be specific.

- g) Provide HelpAge with all data: This will be both in electronic and hard copy (MS Word document, PowerPoint slides).

## **7. Team qualification**

The team leader will have documented skills and experience from conducting strategic reviews and leading teams, including communication and facilitation skills. The team leader should have English language skills. The team shall include the following competencies:

A CV for each team member shall be included in the call-off response. It should contain a full description of relevant qualifications and professional work experience for each member.

It is important that the competencies of the individual team members are complimentary.

To accomplish the objectives of the Strategic Review, the consulting firm/consultant should have a multidisciplinary team with key qualifications and competencies as follows:

- a) A postgraduate degree in a relevant humanitarian and development work related to social science, gender studies, human rights, sociology, project management, and monitoring and evaluation
- b) Relevant professional experience in social science, human rights and development research
- c) Experience conducting similar organisational / strategic evaluations or reviews
- d) Should have knowledge and experience in at least any of the following key crosscutting issues; gender, age, inclusion and disability issues
- e) Strong background and experience in data collection and analysis
- f) Proven experience in undertaking evaluation/research and leading teams, with outstanding skills in qualitative and quantitative research and data analysis
- g) Knowledge of participate research methods
- h) Excellent communication and report writing skills
- i) Experience or knowledge of working on ageing or relevant ageing issues desirable but not essential

## **8. Financial and human resources**

The maximum budget amount available for the Strategic Review is 25,000 GBP.

The contact person at HelpAge is the Global Planning and MEAL Advisor, Theresia Pasiens Kapinga.

Relevant documentation will be provided by the focal person.

Payment will be based on submission of delivery that are satisfactory and have been assessed by the HelpAge team to be of good quality.

- 30% of the contract value after the submission and approval of the inception report
- 40% of the contract value after the submission and approval of the draft report
- 30% of the contract value after the submission and approval of the final report

Taxation laws will apply on the overall consultancy fee.

## **9. Annex**

- HelpAge International's Strategy 2030 - [Strategy 2030 | About us | HelpAge International](#)
- HelpAge's Annual Report [2020-2021](#), [2021-2022](#), [2022-2023](#)

## **Safeguarding**

HelpAge International is committed to safeguarding the communities with which we work, our partners, staff and any others who we come into contact with. Therefore you will also be responsible for:

- Preventing harm and abuse from our people, operations and programmes, to anyone that encounters our work;
- Reporting all safeguarding incidents you see, hear, hear about or suspect, using our internal reporting mechanism;
- Complying with all safeguarding framework policies and practices
- Completing mandatory training courses relating to our safeguarding policy framework and complying with HR vetting procedures.

## **Diversity & Inclusion**

HelpAge International is dedicated to creating a diverse and inclusive environment for all its employees/consultants while extending the culture of inclusion into our work.

We believe that our workforce should reflect the wide diversity of the communities we serve, and that diverse voices should be elevated and intentionally integrated into our work. We embrace difference and diversity of identity, experience, and thought, and actively strive for inclusive behaviours across our work regardless of gender, race, disability, age, nationality, ethnic/national origin, sexual orientation, religious beliefs, marital status, pregnancy, social status, and political beliefs.

## **Application Process**

Interested consultants are invited to submit an Expression of Interest (EOI) for delivery of the assignment and 1-2 examples of previous work to HelpAge HR

[Jobs@helpage.org](mailto:Jobs@helpage.org) with the email subject: Consultancy – Mid-term strategy 2030 Review

The EOI should include:

- Cover letter outlining their suitability for the assignment.
- CV highlighting relevant experience.
- A brief proposal detailing the approach, methodology and proposed budget.

Applications should be submitted by **Tuesday, 24 September 2024**.