

**HelpAge
International**

age helps

Corporate annual plan to March 2012



HelpAge International helps older people claim their rights, challenge discrimination and overcome poverty, so that they can lead dignified, secure, active and healthy lives.

Contents

Introduction.....	3
Our key priorities this year.....	3
Achieving our Strategy to 2015	5
Global action 1: Enabling older men and women to have a secure income	5
Global action 2: Enabling older men and women and those they support to receive quality health, HIV and care services.....	9
Global action 3: Enabling older men and women to actively participate in, and be better supported during, emergency and recovery situations	12
Global action 4: Building global and local movements that enable older people to challenge discrimination and claim their rights.....	15
Global action 5: Supporting a growing global network of organisations to improve their work with and for older men and women	18
Our capacity to deliver	21
Expenditure graphs.....	22
Annex 1: Income by donor targets by March 2012	23

HelpAge International
PO Box 32832
London N1 9ZN, UK
Tel: +44 (0)20 7278 7778
Fax: +44 (0)20 7713 7993
www.helpage.org
info@helpage.org

Registered charity no. 288180

Copyright © April 2011 HelpAge International

Front cover photo: Peter Riukaamya, 73 years old, with his grandchildren, Uganda (Kate Holt/ HelpAge International)

Introduction

During the past year, we continued looking at how to put our mission into practice, both through our work and the way we are structured, in order to support older people and lead a growing international network of Affiliates sharing the same values that underpin our work.

We continued to assess the political, economic and social environment and the direction being taken by the humanitarian and development agenda, which could affect our work.

Externally many of the key issues facing older people are still as in previous years:

- Overall insufficient attention to an ageing world.
- The increasingly negative effects on income of inflation in food and fuel prices.
- The lack of access to basic and geriatric health care.
- Increased migration impacting severely on older people.
- Climate change and increasing impact and frequency of disasters.
- Growing levels of social and economic exclusion and denial of rights of older people.

There are a number of key external issues that are both opportunities and challenges for us and we shall monitor and react to them.

They are:

- The impact of debt and domestic priorities for most member countries of the Organisation for Economic Co-operation and Development (OECD) and its impact on aid commitments – notably within the UK.
- Increasing calls for international aid to be transparent, accountable and demonstrating impact.
- Political upheaval – the potential for the present political unrest in northern Africa to extend.

There are several initiatives and trends that we will monitor and seek to engage with this year and next, including:

- UN Summit on Non-Communicable Diseases (2011).
- World Health Organisation (WHO) Conference on Older People's Health (2012).
- The UN General Assembly Open-Ended Working Group on Older People's Rights.
- Strategy and policy development within UN Women.
- The International Social Security Association Conference (2012).
- The +10 year review of the Madrid International Plan of Action on Ageing (MIPAA, 2012).
- The consultation process for the new European Union (EU) development policy in support of inclusive growth and sustainable development (2011).

This annual plan and budget for 2011-2012 captures our targets and activities for the year. It introduces new output and outcome indicators for assessing our progress year-on-year towards our global actions, which are set out in our Strategy to 2015 document.

Our key priorities this year

Our five-year strategy to 2015 has set HelpAge on an exciting and ambitious course. This year, additional funding from both Age UK and the UK Department for International Development (DFID) will expand our programme in failing states with a focus on partners in eight countries being Colombia, DR Congo, Kenya, Ethiopia, Sudan, Myanmar, the occupied Palestinian Territories and Pakistan and increasing our resource and programme development efforts for Kyrgyzstan, Nepal, Sri Lanka, Tajikistan and Uganda.

Our work in 2011 – 2012 is set out under our five global actions. It features several multi-year priorities:

- Growth of our work in fragile countries.
- Developing different ways of working in middle-income countries where ageing and poverty issues are highly significant.
- Strengthening our accountability, results and performance with a clear vision of our role in policy change, service delivery and network leadership with a compelling plan for change.
- Developing a strong global and local advocacy programme to increase our public visibility and bring greater influence to see our agenda on policy change achieved.

- Continuing to secure and diversify our funding and achieve a moderate income growth that is balanced between restricted and unrestricted.
- Continuing to be cost efficient with a sustainable infrastructure for programme management and support.
- Growing the total number of directly delivered services and support received by older people as a result of our work from 1.2 million to 2 million by 2015.

This year, to achieve positive change in the lives of older people, we will prioritise the following:

In programme delivery and policy change:

- Ensure that at least an additional £300 million is committed in social pensions and statutory benefits for 3 million older people.
- Achieve a significant increase in our direct service activities to improve older people's livelihoods and work opportunities.
- Review livelihoods, community and home-based care models for future scale-up of our programme.
- Delivering our health plan, which focuses the delivery of age-friendly services and the prevention, treatment and management of chronic disease, building strategic partnerships to help us grow and sustain this work. We will also profile older people and our work at the UN Summit on Non-Communicable Diseases.
- Implementing our scale-up strategy for supporting older people affected by HIV and AIDS.
- Building stronger support for global and national rights campaigns on specific issues and towards the development of an international convention on the rights of older people.
- Growing our online profile and web visits through our new marketing strategy, including greater use of blogs, social networking and e-newsletters.
- Developing our network of European activists on older people's rights.
- Developing business plans with Affiliates and partners where HelpAge is reducing our presence.

In strengthening our capacity to deliver:

- Implementation of our new fragile states strategy, investing in our capacity to grow our work in 11 such countries.
- An increase in our capacity to assist older people in emergencies, including the introduction of a new £300,000 Emergency Response Fund.
- Continuation of the roll-out of our accountability framework, focusing on our emergency programmes.
- Sourcing new income to support our technical capacities in social protection.
- Ensuring a sustained commitment from DFID for our work, through influencing and strong delivery of our new DFID Partnership Programme Agreement.
- Strengthening our monitoring, evaluation and learning systems.
- Strengthening understanding of the issues around gender, discrimination, abuse and rights and lobbying for a new UN convention on the rights of older people.
- Reviewing our brand to ensure greater recognition and profile of our work.
- Improving the coordination and standards of our publications and resources across HelpAge.
- Ensuring that we support Age UK's own efforts in achieving its international fundraising targets.
- Continuing our investment in public fundraising initiatives, with a focus on Spain, the Netherlands and the USA and increasing our investments in Germany.
- Continuing to pursue strategic agreements with the Swedish International Development Cooperation Agency (Sida), Irish Aid, Cordaid and the Netherlands government development agency Internationaal Fonds voor Kwetsbare Ouderen (IFKO)
- Growing our supporter base, media profile and Age Demands Action campaign.
- Maintaining the momentum achieved in 2010 – 2011 in implementing our security policy and procedures, with dedicated capacity to monitoring progress.
- Ensuring that we remain a cost-efficient organisation which is sensitive to environmental concerns.

Achieving our Strategy to 2015

Global action 1: Enabling older men and women to have a secure income

Our aims are to:

- Generate further social pension or other benefit commitments of £300 million for 3.2 million older people through our work in advocacy and providing technical assistance.
- Deliver direct programme work to improve incomes through vocational and business training and the provision of loans, materials and assets in 35 countries.
- Deliver a growing programme around protecting livelihoods from shocks and climate change adaptation.
- Lobby governments and micro-finance institutions for better access by older people to micro-credit, labour rights in the informal sector, land and asset rights and the inclusion of older people in cash for work programmes.

Our approaches:

- Global, regional and country level advocacy and communications on the impact of pensions and benefits for older people and their families based on research and evidence.
- Stimulating national advocacy and practical action with older people and civil society to demand access to, or improvements in, pensions and benefits.
- Training government staff in implementing and managing social pension and benefits schemes.
- Providing support, direct livelihoods assistance or cash transfers to older people and their families in places where social security schemes are weak or absent, particularly in fragile states or states adapting to climate change.
- Reviewing and sharpening our livelihoods work for older people and their families.
- Initiating research on micro-credit and older persons friendly financial services.

By March 2012, our work in social protection (pensions and benefits) will have focused on:

Influencing the implementation of social security mechanisms by working with governments and civil society at national level by:

- Continuing technical assistance to ministries in 23 countries, and beginning new engagements in two Latin American countries. This includes country-level feasibility studies, support to exchange visits for government officials and key partners and high-level formal training and micro-simulation modelling of social transfer programmes.
- Supporting the technical capacity, development and growth of national civil society social protection platforms and partners, including trade unions, in 21 countries.
- Exploring opportunities for new partnerships in Brazil, Malawi and Rwanda.
- Assessing the opportunities for reducing our engagement in a number of countries, such as Vietnam, where our partners are now leading work in this area.

Using our work to influence and share learning at regional and international level by:

- Producing a report on "Financing old age" with content on the issues for older people relating to micro-credit or finance support, pensions and work for an independent launch and inclusion in our other communications platforms (online and regular publications).
- Participating in strategic consultations with the UN Social Protection Floor initiative, the World Bank and European Union. This to include campaigning for a specific communiqué on social protection for older people from the EU.
- Seeking closer engagement with DFID in policy development on cash transfers and social protection and encourage visits by senior DFID advisors to our work. This will include working with the UK Grow Up Free from Poverty forum on a social protection event.
- Continuing advocacy with the African Union (AU) to devote resources for monitoring and reinforcing country-level implementation of the AU Social Policy Framework (2009) and

engagement with appropriate organisations to advocate for the inclusion of social protection on the Africa Peer Review Mechanism.

- Engaging with the Association of Southeast Asian Nations (ASEAN) Secretariat and the Asian Development Bank (ADB) in East and Central Asia Central, to ensure the inclusion of social pensions in these organisations' and member states' social protection strategies. This will be as a follow-up on the results of our recent ADB-funded social protection research.
- Utilising our report on the impact of the rapidly expanded informal labour markets (including migration) on government capacities to provide long-term security in old age to create new engagements with international bodies with specific interests in Central Asia, including the UN Economic Commission for Europe (UNECE, Geneva), the International Labour Organisation (ILO, Moscow and Geneva), the UN Population Fund (UNFPA, Kazakhstan) and UNICEF (Geneva).
- Continuing to support intra-regional and international exchange visits between Latin America and Africa for government officials and civil society partners, including a seminar on social pensions in Brazil.

Building a strong evidence base of the value and impact of social protection (pensions/benefits) for older people, by:

- Increasing our work in fragile states through pilot cash transfer programming in Ethiopia, DR Congo, Haiti, north eastern Kenya and Sudan, and ensuring that we effectively document the impact and learning of this work.
- Initiating specific learning activities based on our work in a number of focus areas:
 - the impact of social protection on older people-headed households
 - building knowledge on the contribution of social transfers to livelihoods approaches of older people
 - improving our understanding of the abilities of civil society partners to implement social protection
 - policy options for responding to the rapid change in the labour market structure and simultaneous population ageing
 - documenting evidence of the impact of our work in cash transfers in emergencies and building new concepts for this work in relation to transition to longer-term measures
 - studies on the nature of older people's work and the impact of migration.

By March 2012, our work on sustainable livelihoods will have focused on:

Improving our existing work and implementing new initiatives to build the quality of our programmes. We shall also seek better definitions of the audiences we will need to target to improve the opportunities older people have to decent and appropriate work and to identify strategic partners at all levels to improve the mainstreaming of older people into livelihoods programming. Our thematic global learning review this year will focus on promoting and securing older people's livelihoods, using research completed in 2010 - 2011 and past and new studies and evaluations, particularly those related to income generation work with older people's associations in East Asia.

For the development of models and learning with our partners across this work for development next year and beyond, our key areas of learning and focus will include:

- Using our new risk-reduction approach which incorporates improved assessment of vulnerability to environmental hazard and climate change. This approach will be prioritised in programme design for new work in fragile states and countries susceptible to frequent natural disasters.
- Reducing the barriers to accessing micro-credit facilities from existing micro-credit and finance institutions, particularly for women, and capacity building local partners and older people's associations (Bangladesh, Colombia and Vietnam).
- Improving income and food security for older people in arid and semi-arid regions (Ethiopia, India, Kenya and Sudan).
- Improving livelihoods in refugee and displaced camps (Kenya and Sudan).
- Monitoring the development of locally-designed pilot models for community income generation projects to support the establishment of local "social funds" (India).
- Improving the capacities of partners to provide livelihood support to older carers and vulnerable older people living in care homes (Lesotho and Zimbabwe).
- Creating older people's credit unions (Haiti and Jamaica).
- Providing access to employment for older people through employment centres operated by older people's associations (Haiti).

- Providing climate-resilient and age-appropriate livelihoods and a reduction of household expenditure through cost-saving initiatives and tailored livelihoods support to older carers in Central Asia.
- Compiling studies on the nature of older people's work and the impact of migration (Central Asia and Bolivia).
- Piloting the monitoring of older people's food security and nutrition using a new tool in Mozambique.

There will also be specific work relating to the ILO Decent Work Agenda and the protection of informal workers in our Latin American and global programming.

Table 1 sets out the outputs and outcomes that we shall use to monitor our work in securing income for older people on a year-by-year basis. We will also provide examples and evidence of the impact and effectiveness of our work.

Table 1: Our targets for securing income for older people by March 2012

Strategy to 2015 Indicator	Output and outcome indicators	Baseline at March 2011	Target by March 2012	Change for 2011 - 2012
We will enable older men and women to access a secure income				
20 per cent more older men and women in 30 low- and middle-income countries are receiving state non-contributory pensions or benefits	No. of countries where HelpAge provides technical assistance to governments on social protection (pensions/benefits)	23 countries	25 countries	Two new country engagements initiated
	Coverage and value of new or improved social protection schemes (benefits/pensions)	Zero – we will measure the cumulative additional benefits from this baseline year-on-year	£317 million per year to 3.2 million older people	Governments commit to providing an additional £300 million per year to more than 3 million older people
Households containing older men and women experience sustained improvements in their income and food security in 25 countries	No. of older people's associations involved in income generating work	2,107 older people's associations including 59,000 members	2,743 older people's associations including 86,000 members	600 more older people's associations supported to access income generating opportunities
	No. of older people working to reduce shocks (disaster risk reduction, seasonal poverty, drought and so on)	53,000 older people	102,000 older people	50,000 more older people working to reduce shocks
	No. of older people getting new access to financial services	30,000 older people of whom 54 per cent are women	64,000 older people of whom 56 per cent are women	35,000 more older people are able to access micro-finance or credit services through service delivery or our advocacy work

Global action 2: Enabling older men and women and those they support to receive quality health, HIV and care services

Our aims are to:

- Establish non-communicable diseases as a key priority in the international health and humanitarian policy arena and support older people in developing countries to improve the prevention, management and early diagnosis of chronic illnesses.
- Improve access to age-friendly health services for older people.
- Enable supported self-care and care giving and receiving by older people, their families and communities.
- Ensure the inclusion of older people in new approaches to health financing.

Our approaches:

We will achieve these aims by:

- Building on existing expertise of the network and strengthening strategic alliances.
- Delivering health services where others are failing to do so and/or where we wish demonstrate or develop good practice.
- Engaging in advocacy and policy influencing at national and regional level.
- Seeking to build partnerships with organisations in related health fields, including outreach to the private sector.

We are supporting and implementing health, HIV and AIDS and care service work in 40 countries. Table 2 shows the output and outcome indicators we will use to monitor our work by in 2011 - 2012.

By March 2012, our work in health and care will have focused on:

Programmes of service delivery

We are aiming to assist 360,000 older people receive better access to health, HIV and AIDS and care services – an increase of 150,000 on 2010-2011. We will assist older people by working directly and with partners through:

- Supporting older people's associations to monitor government health service delivery or support the implementation of health activities in 20 countries.
- Helping older people receive homecare, access to doctors, medicines and support with other costs in 23 countries. Our care and support work here also includes the delivery of basic health education.
- Improving the lives of orphans and vulnerable children through psychosocial support to grandparents affected by HIV and AIDS and migration in the Caribbean, Central Asia and Africa.
- Implementing or developing work related to specific non-communicable diseases – particularly diabetes and mental health problems in five countries.
- Supporting or implementing ophthalmic programmes in nine countries.
- Providing a range of self-care and healthy ageing interventions in 15 countries.
- Implementing prevention, treatment and care initiatives in the context of HIV and AIDS in 15 countries, including new initiatives in the Caribbean and Moldova.
- Training health professionals in providing age-friendly services to prevent, diagnose and treat geriatric and/or non-communicable diseases in 17 countries.
- Developing and running community physiotherapy services through our Sponsor a Grandparent programme in India.

Influencing the international community, governments and service providers

We will seek:

- An outcome document that includes commitments to the provision of care and support for older people as a result of our participation at a UN Summit on Non-Communicable Diseases.
- Greater visibility for people over 49 in UNAIDS indicators for HIV and AIDS and a commitment to piloting of a set of internationally used care and support indicators.

- Improved inclusion of older people in humanitarian programmes by the UN humanitarian health cluster systems in DR Congo, Kyrgyzstan, Haiti, Sudan and Ethiopia.
- Adoption of national guidelines on volunteer homecare in Cambodia and Vietnam.
- A commitment to expanding government ophthalmic services in Ethiopia, Tanzania and Zimbabwe.
- Positive outcomes in government commitments to older people's health as a result of a number of Age Demands Action campaigns.
- Improvement of the provision of geriatric healthcare training in Tanzania and Mozambique.
- Improvement of our work with key strategic partners including WHO, UNICEF, the Pan American Health Organisation and Alzheimer's Disease International.

Improving the quality of our work

This year there are several areas of focus in learning and documenting our work to create standard models of best practice. This will support our ability to increase the scale of our work with impact and will include:

- A cross-regional consolidation of our work and models in self-care and healthy ageing and home and community-based care models.
- Capacity building for traditional healers to provide healthcare and referrals to health facilities.
- Documenting our work on "age friendly" primary healthcare services to develop training curriculum guidelines and to improve our key messaging through best practice examples.
- A review of our model of older people's associations in promoting primary health care services in rural areas, using new programme evaluations in East Asia due this year.

Generating new research and communications

We will continue to learn and communicate how to improve older people's health through:

- Producing evidence on the difficulties older people face in enjoying their right to health for submission to the UN Special Rapporteur on the Right to Health for his report to the Human Rights Council.
- Producing of a resource package on home care - "Who cares?" - drawing on programme learning and communications materials from our work in Latin America and Central Asia. This will be supported by a briefing in the August issue of *Ageing and Development* on the cost of care.
- A national study on health needs and the affordability of free or discounted healthcare for older people in Ethiopia, which will be documented and disseminated.
- A study on the quality of health services for older people at local level in Mozambique to strengthen our existing data on access to services. This will help to better define an "age friendly" service and contribute to the Ministry of Health priority to "humanise health services".
- Undertaking research collaborations with University College London and the Caregivers Action Network (UK Consortium) on children and care to build our learning and key messaging on older people and care in preparation for the International AIDS Conference in 2012 and use in our wider work.
- Publishing and disseminating findings of the Africa Regional Inter-Agency Task Team on Care inter-generational relationships study.
- Publishing a report on the data collected by older people's associations in Central Asia on the impact of climate change and seasonal shocks on food and income security, health status, housing and livelihoods in ultra-poor households.
- Producing a study of knowledge, attitude and practices (KAP) on mental health issues in Jamaica, with specific focus on Alzheimer's disease, dementia and depression.

Table 2: Our targets for health, HIV and care by March 2012

Strategy to 2015 Indicator	Output and outcome indicators	Baseline at March 2011	Target by March 2012	Change for 2011 - 2012
We will enable older men and women and those they support to access quality health, HIV and AIDS and care services				
Older men and women in 15 countries can prevent and manage chronic illness	No. of countries providing new geriatric/non-communicable disease training for its health professionals	Five countries	12 countries	Seven more countries working on initiatives to train health professionals
Older men and women in 20 countries receive guaranteed free access to age-friendly health services	No. of older people reporting increased access to health services	204,000 older people of whom 59 per cent are women	362,000 older people of whom 60 per cent are women	150,000 more older people accessing health services
Older men and women in 12 countries receive appropriate HIV and AIDS services	No. of governments increasing access to Anti-Retro Viral treatment or support services for older people and family members living with HIV	Five countries	Ten countries	Governments in a further five countries commit to improved action on treatment and care programmes benefitting older people (Kenya, Tanzania, Uganda, Zambia and Jamaica)
Older men and women receive a range of appropriate primary healthcare services in 25 countries	Total numbers of older people receiving improved access to community based care	17,000 older people of whom 66 per cent are women	44,000 older people of whom 66 per cent are women	25,000 more older people access community based care, with an emphasis on growth planned in fragile states
	No. of older people reporting improved health status (through improved access, service delivery, self-care, improved income, etc)	141,000 older people with a minimum of 60 per cent women	244,000 older people with a minimum of 60 per cent women	100,000 more older people are able to report an improvement in their health status

Global action 3: Enabling older men and women to actively participate in, and be better supported during, emergency and recovery situations

The humanitarian landscape is changing. Demographic change, climate-related and natural disasters, food crises, urbanisation, migration, pandemics and financial crises are expected to drive up humanitarian needs by creating more conflict, poverty and inequality. Combined, they are likely to create chronic vulnerability on a massive scale.

HelpAge has substantial knowledge and experience of emergencies. We have provided assistance to older people in numerous emergencies and greater awareness has been created in the international humanitarian system of the particular strengths and vulnerabilities of older people and the need to both build on and address them.

Our aims are to:

- Support older people and their families in new sudden onset emergencies as they arise.
- Continue to assist older people in emergency and recovery programmes in 13 countries including continuing the major responses we have mounted continued in Pakistan and Haiti.
- Consolidate and increase our work in Kenya.

Our approaches:

Based on our new Emergencies Strategic Plan we will:

- Further increase our operational responses through the delivery of programmes in sudden onset emergencies and fragile contexts.
- Strengthen our technical expertise and evidence, focusing on protection, livelihoods and health, including improved vulnerability and risk analysis.
- Integrate ageing in policy and practice, by stronger field-level and headquarters collaboration with targeted international humanitarian actors.

By March 2012, our work in emergency and recovery situations will have focused on:

Building our operational experience. We will:

- Deliver services to approximately 230,000 older people in our emergency and recovery programmes in 13 countries.
- Focus on growth in our programmes in DR Congo, Ethiopia, Uganda, Colombia and the occupied Palestinian Territories and maintain the scale of our work in Haiti and Pakistan, adapting these to recovery programmes. We are seeking to establish new work in Kenya, focusing on camps, and will adapt our work to the changing circumstances in Sudan.
- Respond appropriately to new emergencies, supported by a new emergency response fund and work in consortia and partnerships with international and national agencies.
- Complete and pilot new needs assessment and beneficiary accountability tools and approaches in our new programme development work, and revise our emergencies manual.

Building our technical expertise and evidence

We will continue to ensure that knowledge and understanding of older people's needs in emergencies is developed and that our practical experience of how those needs can be met is documented and shared widely both within HelpAge and externally. This year we will focus on:

- **Producing new best practice guidelines:** focusing on health, protection in displaced and returning populations, livelihoods and cash transfers (including new concepts for designing work to address the stages of response, recovery and development) and needs assessment. This work will be supported by new advisers for health and needs assessment.
- **Accountability practice:** we will pilot our new accountability framework in Haiti and use the framework to develop key performance indicators for accountability in all new emergency operations.
- **New research work:** we will undertake research in four key areas of our work to strengthen both new areas of engagement in our programming and our influencing. The areas of research include humanitarian financing, cholera interventions and older people, protection

(focusing on displaced and returning populations) and disaster risk reduction, including environmental risk and climate change adaptation). We will collaborate with a range of partners in this work – Medecins Sans Frontiers, UNHCR, ICRC and the relevant UN humanitarian clusters.

Integrating ageing in humanitarian policy and practice

We will continue to integrate ageing in the policy and practice of major humanitarian actors. Our work this year will prioritise influencing through:

- **Engagement with the IASC:** we will continue our work with the UN Office for the Coordination of Humanitarian Affairs (UNOCHA), IASC members and international humanitarian NGOs to ensure the needs of older people are met in emergencies. This will include supporting the reviews of cross-cutting issues and vulnerability in needs assessments by UN agencies and NGOs and developing a training module of the needs of older people in emergencies for field staff. The outcomes we are seeking in the coming years will be that UNOCHA-led multi-sectoral needs assessments are including ageing issues, that organisations are including ageing issues in their applications for funding under the UN Consolidated Appeals process and that this translates into increased action on the specific needs of older people in emergencies.
- **Funding mechanisms:** we will engage with humanitarian donors through the donor-cluster forum and bilateral meetings in order to raise awareness of ageing and to mobilize funding for IASC follow up activities and for humanitarian assistance and protection for older people. There will be a particular focus on the European Commission Humanitarian Office (ECHO) and DFID. We will also continue our review of Consolidated Appeals for the inclusion of older people on an annual basis.
- **Field-level secondments:** we will manage field secondments to UNHCR and the UN Protection Cluster in order to ensure the inclusion of ageing issues in policy and practice at field level. With UNHCR we will produce a meta-report of the findings and recommendations from all our protection cluster secondments over the past two years.
- **Existing partnerships:** we will develop and support collaboration under our agreements with Merlin and British Red Cross to facilitate development of new field level relationships, and produce simple operational guidelines on actions that each partner will take forward to strengthen communication and joint operations.

To monitor our work, we have established four measures for the growth and scope of our work in 2011–2012, shown in Table 3. These will be supported by external and internal evaluations or reviews of our work in specific emergencies.

Table 3: Our targets for emergency and recovery work by March 2012

Strategy to 2015 Indicator	Output and outcome indicators	Baseline at March 2011	Target by March 2012	Change for 2011 - 2012
We will enable older people to actively participate in and be better supported during emergency and recovery situations				
Older men and women receive direct assistance from us and our partners to prepare for, withstand and recover from emergencies	No. of countries where we provide humanitarian assistance or recovery programmes	13 countries	14 countries	New engagements initiated in Kenya
	Total numbers of people benefiting from emergency response and recovery programmes	181,000 older people of whom 57 per cent are women	228,000 older people of whom 58 per cent are women	50,000 more older people supported in emergencies and recovery programmes
Ten major humanitarian agencies recognise and respond to the needs and capacities of older men and women in emergency preparedness, response and recovery	No. of countries where we work to improve national disaster preparedness and response plans	18 countries	21 countries	New engagements initiated in Central and South Asia and Latin America
	No. of humanitarian agencies that specifically respond to older people's needs in their policy and programmes	Three agencies	Six agencies	To continue our work with UNHCR, Merlin and the British Red Cross and create new work and partnerships with UNDP (early recovery cluster), Handicap International and MSF. Other opportunities may arise through our work in Geneva with IASC members

Global action 4: Building global and local movements that enable older people to challenge discrimination and claim their rights

Our aims are to:

- Increase the visibility of older people and ageing issues and see greater inclusion of these issues in mainstream political concerns.
- Support a network of Affiliates, partners and public supporters from around the world who support action on global and local ageing issues and who can create dialogue between older men and women, governments, the United Nations and other development actors to ensure social justice and empowerment for older people.
- Lead actions at international level with a coalition of ageing networks to support the new UN Open-Ended Working Group on Older People's Rights.

Our approaches are to:

- Provide leadership, support and information to encourage action by individuals, local older people's groups and associations and national age organisations and networks.
- Support the growth in movements at all levels to create the legitimacy, influence and profile of the issues of international ageing and to sustain pressure on government and society to act.
- Provide opportunities, platforms, information and resources to allow others to take practical action to obtain a better deal for older people to claim their rights and entitlements.
- Support older citizens' monitoring of national poverty reduction or other programmes; paralegal support and "socio-legal" centres and media awareness training and engagement.
- Address specific legal, rights and abuse issues through work at community level, with older people acting as instigators for change within their communities to lobby for legislative change.

By March 2012, our work with global and local movements will have focused on:

Supporting local movements and networks in low and middle income countries

We are continuing to support older people's associations to manage project work and to lead in acting on issues of exclusion from services. We are:

- Aiming to see approximately a 30 per cent growth in the number of older people's associations mobilised, trained and supported to lead and manage project initiatives across 31 countries.
- Aiming to support at least 50 per cent more older people's associations to monitor provision of services by government and other agencies in 19 countries.
- Working with older people's associations and to see a 75 per cent increase in the number of older people being supported to access a service or entitlement.

Mobilising action around specific issues to prohibit and reduce discrimination

Older people, and especially older women, often face acts of discrimination or abuse. We will be working in seven countries on programmes that prohibit or reduce such acts.

- **Tanzania:** will work to improve legislation concerning witchcraft killings and women's inheritance rights. Such improved legislation would benefit about 10,000 older women.
- **Burkina Faso:** reducing the social exclusion of 400 women from services and providing psychosocial support. This work also includes advocacy on reviewing the penal code.
- **Kenya:** develop new activities in relation to preventing witchcraft-related violence.
- **Mozambique:** will continue and develop work to reduce acts of violence in four provinces and the development of methodologies for fighting stigma and discrimination against women in the context of HIV and AIDS.
- **Central Asia:** new programming in three countries on tackling domestic and community violence against older women and men, collaborating with Age UK's partners in Ukraine.
- **Kyrgyzstan:** continuing work on police reforms and the development of community policing to reduce abuse against older people.

- **Jamaica:** intergenerational activities to foster better understanding of children and older people's rights in intergenerational households, aimed at protecting older people affected by rising criminality.

Building an evidence base of the discrimination and rights violations older people face

To create evidence of specific discrimination and acts of abuse against older people to support our call for a convention, we will:

- Undertake at least one analysis, by each international office, of exclusion from services to determine the levels of specific age discrimination being faced.
- Collect case studies on extreme violations of women's rights in Tanzania, Kyrgyzstan and Mozambique.
- Work on domestic abuse in Central Asia for use as a communications "flagship" project.
- Facilitate international events on rights violations, including promoting a statement on extreme rights violations to coincide with World Elder Abuse Day and the World Demographic Association conference, and work with Affiliates and the HelpAge Rights Group to publish a new report on this as a pilot on producing material with the network.

Engaging with existing UN rights mechanisms

In the absence of a UN convention on the rights of older people, we promote the protection of older people by governments through existing UN mechanisms including the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) and the Universal Periodic Review (UPR) of the UN Human Rights Council. These bodies use their reports to hold national governments to account for the protection of their citizens.

This year we shall submit reports to:

- The committees for monitoring the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) in Mozambique and Kyrgyzstan.
- The International Convention on Economic, Social and Cultural Rights (ICESCR) in Moldova and Tanzania.
- Follow-up submissions for the Universal Periodic Review of the UN Human Rights Council focusing on Moldova, Tajikistan, Uganda and Tanzania, plus additional reports based on the forthcoming reporting schedule.

We shall also explore opportunities to develop submissions, or establish new engagements with a number of other bodies this year, including:

- The Inter-American System and Organisation of American States, focusing on Paraguay and Peru.
- The UN Special Rapporteur on the "Right to Health".
- The Human Rights Council on the right to palliative care.
- The UN General Assembly Open-Ended Working Group on Older People's Rights.
- UN Women.

Mobilising committed supporters by key HelpAge Affiliates and HelpAge International

We aim to encourage individuals interested in the issues of ageing to become activists by signing up for a publication, giving money or taking action on a fundraising, communications or advocacy campaign. We are focusing on building supporters through:

- **Online media:** targeting 10,000 people on our database by the end of 2011-2012 and providing multi-media content to Affiliates so that they can grow their own supporter numbers.
- **Publications and corporate materials:** increasing sign-up by 10 per cent a year.

To provide ongoing monitoring of our work, we have established six key measures for the growth and scope of our work in 2011–2012, shown in Table 4. They will be supported by external and internal evaluations or reviews of our work and will be represented by examples of the actions older people and their movements choose to take and their successes.

Table 4: our targets for our work with global and local movements by March 2012

Strategy to 2015 Indicator	Output and outcome indicators	Baseline at March 2011	Target by March 2012	Change for 2011 – 2012
We will build global and local movements that enable older people to challenge age discrimination and claim their rights				
Older men and women lead community action to realise their rights to services and practical support in 25 countries	Overall number of older people's associations being worked with	2,637 older people's associations	3,617 older people's associations	1,000 more older people's associations supported globally
	No. of older people's associations monitoring government service delivery	930 older people's associations with a membership of 33,000 older people	1,455 older people's associations with 51,000 older people as members	500 more older people's associations trained and supported globally
	Total number of older people assisted to claim existing entitlements	65,000 older people of whom 60 per cent are women	117,000 older people of whom 60 per cent are women	50,000 more older people supported to access an entitlement
Older men and women are helped by work that prohibits or reduces discrimination against them in 15 countries	No. of countries where we work to prohibit or reduce specific issues of abuse or discrimination of older people	Nine countries	11 countries	New work initiated with Age UK in Central Asia and the Former Soviet Union
	No. of older people taking action locally around specific rights abuses and exclusion from services	57,000 older people of whom 56 per cent are women	78,000 older people of whom 58 per cent are women	20,000 more older people will be supported to take practical action
	No. of countries where HelpAge is producing reports to UN or other rights mechanisms (including CEDAW or the UN Human Rights Council)	Nine reports produced in seven countries	At least eight submissions in six countries	Submissions to The International Convention on Economic, Social and Cultural Rights (ICESCR) for the first time in two countries
	Progress on the UN convention on older people's rights	A coalition of age-focused NGOs and networks proposed with secretariat services committed by Age UK		A formal agreement established by the new coalition, with a workplan developed
A global group of one million committed supporters is developed by key HelpAge Affiliates				HelpAge's supporter database has 10,000 supporters. Growth in the use of online services and subscriptions to our regular publications by 10 per cent in each area.

Global action 5: Supporting a growing global network of organisations to improve their work with and for older men and women

The Affiliate network is at the centre of HelpAge International's mandate. Over the years, members of this network have been vital as influencers on ageing, partners in the delivery of HelpAge's programmes and supporting evidence, policy, and national action on ageing. A significant part of the board is drawn from the Affiliates. HelpAge is celebrated as a network organisation by the Affiliates and affirmation of Affiliate engagement with our work and vision has strongly emerged through the branding process, the 2009 meetings of Affiliates and HelpAge staff, regional Affiliate discussions and successive board discussions.

Our aims are to:

- Increase our impact by strengthening the HelpAge International network and by working in partnership with other organisations as well.
- Provide leadership and support through developing global campaigning platforms, such as Age Demands Action and national or regional reviews of the MIPAA.
- Convert the high regard for the HelpAge International network into increased profile for ageing and development.
- Ensure the expansion and deepening of the network and its engagement with HelpAge, including developing a stronger network in OECD countries and from the emerging economy countries of Russia, China, India and Brazil.

Our approaches are:

- Working to encourage and support increased leadership from our network Affiliates in our themes of work and our shared advocacy agenda.
- Building the knowledge base of our network to deliver quality work and grow our collective funding base.
- Using our brand to support the positioning and visibility of the HelpAge International network and the issues it seeks to address.

By March 2012, in our work with the global network will have focused on:

Working better globally with Affiliates. We will:

- Develop compelling evidence for the MIPAA+10 reviews in 2012: supporting Affiliates to drive the national and regional action on the MIPAA review.
- Increase the number of Affiliates participating in Age Demands Action from 51 to 55 countries and strengthen inter-Affiliate networking.
- Expand and strengthen our Linking Lives development awareness initiative: we will continue to encourage older people in Europe to advocate for ageing issues to be included in EU development budgets, by linking them with older people in Kenya. We will work with five European Affiliates to recruit activists to link with local partners in Kenya.
- Examine two new campaigns with Affiliates on the themes of "grand-parenting" and older people and chronic illness. We shall also assess the feasibility of a campaign for a UN convention. We will work as part of the HelpAge Rights Group with Age UK, other coalition partners and our Affiliates to further develop a public-facing campaign for a UN convention on the rights of older people.

Encouraging Affiliation to the network

- We are seeking to increase the number of our Affiliates from 80 to 86 this year.
- New Affiliates applications will be submitted to our Board from Ethiopia, South Sudan, Ecuador, Paraguay, Ukraine and Tajikistan.
- We shall explore the requirements for national networks of older people's associations to become Affiliates, following requests from Bangladesh and Latin America.
- Within Europe and OECD countries, we will continue to develop new Affiliate development and nominations in Sweden and Finland.

Affiliate and partner capacity building and development

Our regional offices have identified a number of priorities in this work for the year:

- Institutional development of the older people's network, ANAMPER, in Peru: development of a fundraising and governance framework.
- Support to Affiliate Uganda Reach the Aged Association (URAA) to become a national age umbrella organisation.
- Supporting our African partners to assess their organisational capacities: complete partner capacity assessments in 13 countries and implement the associated actions plans arising.
- Build the capacity of partner organisations in the Caribbean to respond to emergencies and to engage with the rights convention campaign.
- Support the development of draft country network strategies in Paraguay and Ecuador with existing partners and older people's organisations.
- Continue capacity building through our partner exchange programme in East Asia, focusing on health and local accountability mechanisms.
- Launch a Russian language e-newsletter to foster interaction in Central Asia and across the Former Soviet Union.
- Support key partners in Tanzania by information events on concepts to improve older people's participation.

Brand development

We will continue to ensure an effective brand proposition and increase its use by:

- Reviewing the roll-out of the brand across the HelpAge network and producing a brand growth plan for the network, reflecting more refined "age helps" values.
- Refreshing and rolling out visual identity guidelines and brand templates.
- Providing key messages to the eight "sister" Affiliates to support their fundraising.
- Holding discussions with HelpAge India and one other Affiliate to become sister organisations.
- Raising the profile of HelpAge's brand globally by supporting two fundraising and supporter engagement activities with sister organisations.

Transition and succession planning between HelpAge and network members

- We will complete action or business plans to support the transition from HelpAge country programme offices to national organisations in Tanzania, Jamaica and Cambodia.

Strengthening and developing our support and resources for Affiliates

We will continue to develop the services we provide to the network as a secretariat. Key activities this year are:

- The launch of an Affiliate extranet to encourage knowledge sharing.
- Increasing Affiliates awareness of, and engagement with, the Offers and Obligations package.
- Completion of a first round of grants using a new network development fund.
- Progressing actions from the Age UK global influencing and international fundraising meetings.
- Establishing regular correspondence from our Chief Executive Officer to Affiliates.
- Establishing a well-functioning network administration, including receiving fees from Affiliates.

Development of thematic groups across the network

For greater activism by the network and to improve technical capacity building initiatives between our network members, a number of activities have been identified:

East Asia:

- Create regional exchanges on health, replicating models of older people's associations and engagement with the MIPAA+10 review.
- Developing joint network agendas on social pensions, homecare, health and emergencies.

Latin America:

- Create thematic clusters and network engagement around income, health, emergencies/DRR and climate change and on MIPPA+10 planning and activities.

South Asia:

- Create Affiliate and partner steering groups on secure income, health, and emergencies.

The Caribbean:

- Helping to build a national coalition on older people's rights in Jamaica.

Table 5 shows the key outputs and outcomes we will monitor during 2011–2012.

Table 5: our targets for supporting a growing global network by March 2012

Strategy to 2015 Indicator	Output and outcome indicators	Baseline at March 2011	Target by March 2012	Change for 2011 - 2012
We will support a growing global network of organisations to improve their work with and for older men and women				
120 Affiliates, adopting the HelpAge values and visual identity, form a global network shaping and supporting a common agenda and leading national, regional and international initiatives	No. of Affiliates	80 Affiliates	86 Affiliates	Six new Affiliates proposed to the HelpAge Board
	No. of partners taking on lead role in network initiatives			New partner-led initiatives planned for Latin America, South Asia, East Asia and Jamaica
	No. of countries where partners are leading the network programme	35 countries	35 countries	Transition planning will be developed for Jamaica, Tanzania and Cambodia
Global and national campaigns take place in 50 countries to demand changes in laws and policies to respect the rights of older men and women	No. of countries where older people are involved in national level action for improved services	51 countries	55 countries	Four new countries added to the ADA campaign
	No. of countries where we work to promote national policies, plans and/or laws on ageing	31 countries	34 countries	Increased support to Affiliates and partners in Africa and Latin America
	No. of older people with potential to benefit from new or improved policies (policy passed but not yet implemented)	Zero - refers only to new policies passed	1.8 million older people of whom 55 per cent are women	Increased pension/benefit coverage, but also through the amendment of national ageing policies
Awareness in the UK and five OECD countries of the international ageing agenda is raised through campaigns and development education	Number and reach of global campaigns (with narrative examples of success)			Two campaign strategies developed and commenced. A feasibility study on a campaign for a UN convention completed
	Outcomes of joint work to influence UK and European governments/the European Commission		Submissions on the EU green paper on development presented	

Our capacity to deliver

To deliver our global actions to 2015 we are targeting:

Building income from diverse sources which can be applied flexibly to help us achieve our targets, with 20 per cent of our income from Affiliate sources outside the UK

- We shall seek modest growth in our income in 2011–2012 to £26 million and will continue to invest in new market growth in Spain, Germany, the Netherlands and the US. Detailed targets for income by donor are shown in Annex 1.

We will also strengthen our systems to:

- Ensure that we qualify as a prime recipient of USAID grants. This includes completion of a “cost allocation model” within our SUN accounting system in order to apply for NICRA (overhead costs), timesheet systems and awareness of non-allowable expenses.
- Ensure we are able to manage high-volume donor income from public fundraising (HelpAge International Spain and other public fundraising).

Continue to strengthen our governance and leadership

- Continue the development of our Leadership Group, ensuring an annual meeting, regular teleconferences and information sharing.
- Embed our Leadership Framework in our working practices. HR will work closely with the Leadership Group to achieve this aim.
- Achieve positive results from our governance self-assessment process, with clear management responses.
- Continue to implement an internal audit approach to support our Board in risk management, and work to embed a “light touch” risk management approach in our working practices.

All HelpAge offices demonstrate high levels of accountable management practice

- Continue staff and systems development processes to permit greater subsidiarity in financial management from London to international offices.
- Implement financial management training based on the SUN and Vision Excel accounting and monitoring packages, focusing on promoting a deeper understanding of underlying financial systems and practice by both UK and international finance staff.
- Review our contract management procedures and proposal and contract approval system.
- Increase in-country training of staff on using and managing our contracts database, with a focus on our offices in Africa.
- Ensure continued progress on compliance monitoring of our security policy and continuation of training of senior management in crisis management.
- Design and implement new financial planning models to support multi-year planning and stronger regional based management of financial planning.

Invest in our staff to build the skills we need to achieve our strategy

- Recruit new staff in London and international offices to strengthen our technical capacities in emergencies, health and communications.
- Review our approach to training, ensuring this becomes more methodical, and seek to make greater use of mentoring, coaching and internal training.
- Ensure continued progress on compliance monitoring of our security policy and continuation of training of senior management in crisis management.
- Put in place an emergency roster will be in place by June 2011, enabling us to respond better to emergencies.
- Invest in improving staff retention in our Sudan programme, particularly in Darfur, and strengthen overall human resource management capacity to ensure it is equipped for significant programme growth.

Develop an operational resilience which ensures business continuity at all times

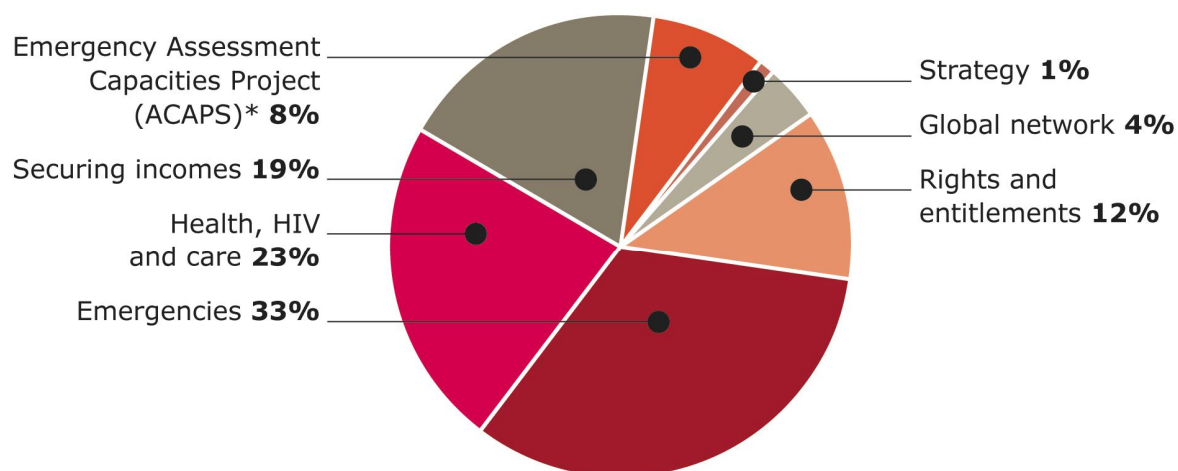
- Continue the implementation of our environmental and climate change policy, including completion of carbon foot-printing for our London office and the implementation of pilot international office and community initiatives in three countries.
- Continue the transfer of our IT systems to virtual (cloud) computing and initial adoption of SharePoint technologies, which will make our systems more accessible to mobile users and more reliable.
- Move to a new London office without disrupting our work.

Expenditure graphs

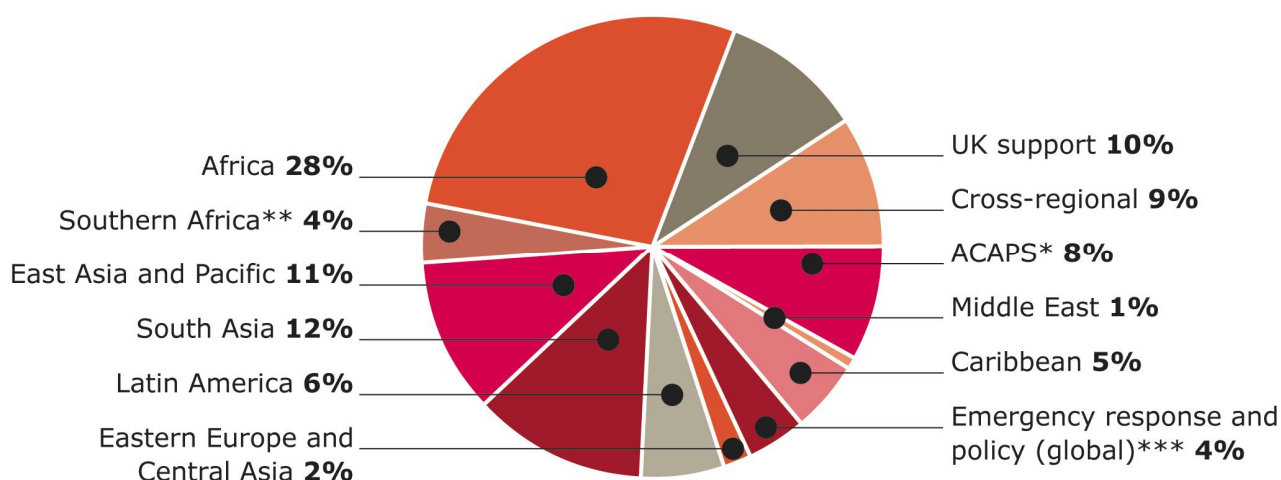
The Annual Budget is documented separately.

The charts below provide an indication of how HelpAge will target its resources in 2011 -2012:

Programme expenditure by HelpAge's Global Actions 2011 - 2012



Programme expenditure by location 2011 - 2012



* The ACAPS project is a global programme, managed by a team based in Geneva.

** Southern Africa will be a new sub-region established this year to strengthen and increase our work across the continent. Africa represents our work in all other parts of Africa, including our regional programmes managed from the Africa Regional Development Centre in Kenya.

*** Our World Wide Emergencies team is managed from London but provides services to all our emergency operations.

Annex 1: Income by donor targets by March 2012

	2010 ¹	2011
	£ million	£ million
Bread & Butter donors	12.40	13.82
DFID Partnership Programme Agreement	1.80	2.67
DFID Local	0.35	0.50
DFID Consortium of British Humanitarian Agencies	0.70	0.30
European Commission	2.00	1.80
Big Lottery Fund	1.40	1.60
Comic Relief		0.10
Irish Aid	0.45	0.45
Swedish International Development Cooperation Agency	1.70	2.00
UK trusts	0.20	0.20
European Union trusts	0.10	0.20
Cordaid (Netherlands)	0.50	0.30
USAID	0.30	0.50
AECID (Spain)	0.10	0.10
In-country (including UN)	2.70	3.00
Island States (e.g. Guernsey, Jersey)	0.10	0.10
Emergencies	1.93	2.01
European Commission Humanitarian Office (ECHO)	0.30	0.10
EC Disaster Preparedness (DIPECHO)	-	0.10
Common Humanitarian Funds (CHF/HRF) (in-country pooled)	0.50	0.60
OFDA (US)	0.50	0.30
SV (Netherlands)		0.10
DFID Chase	0.20	-
Irish Aid	0.10	0.20
AECID (Spain)	0.30	0.50
Island States	0.03	0.06
Norwegian Ministry of Foreign Affairs	-	0.05
Affiliates	1.50	1.10
US Restricted	0.10	0.10
US Emergencies	0.50	0.20
Germany	0.50	0.40
Holland	0.30	0.40
Canada	0.10	-
Via other Affiliates		-
Unrestricted initiatives	-	0.20
HelpAge Spain		
Age UK investment new markets		0.20

¹ Income figures for 2010 – 2011: please note these are indicative only at the time of producing this plan.

	2010	2011
	£ million	£ million
Age UK	8.20	8.90
CPE and Emergencies (including Disasters Emergency Committee)	4.50	5.50
Other Sponsor a Grandparent	1.60	1.40
Unrestricted	2.10	2.00
Total Income	24.03	26.03
Emergency donors and Age UK CPE	7.24	7.96
Other Restricted (including. CPE income from core donors)	12.30	12.71
Unrestricted	4.49	5.36
	24.03	26.03
Unrestricted %	19%	21%