

**HelpAge  
International**

*age helps*

# **Annual report and financial statements**

31 March 2011



***With a little support***

***older people make  
a big difference***

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

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## The year in review

*"Of all the people in human history who ever reached the age of 65, half are alive today."*  
(Fred Pearce, *New Scientist* magazine)

As we end the first year of our Strategy to 2015, we are pleased to report that, together with our Affiliates and partners, we have helped millions of older people and their families to lead more dignified, active, healthy and secure lives.

The HelpAge network – now 88 Affiliates strong – has played a key role in promoting older people's rights. We are glad that our message about the phenomenon of global ageing and the need to challenge age discrimination is at last getting a wider hearing. In 2010, the UN High Commissioner for Human Rights called for better protection of older people's rights, and the UN General Assembly set up the UN Open-Ended Working Group (OEWG) on Ageing. We will work to influence this important platform as part of our call for an international convention on the rights of older people.

### Delivering services

At least 750,000 older people and their families accessed our services on 1.4 million occasions. These services helped older people improve their health and wellbeing, increase their income, care for their dependants and recover from emergencies. More than half the people we reached live in countries experiencing long-term emergencies, including Colombia, DR Congo, Ethiopia and Sudan.

We trained 25,000 government and other agency staff in social protection, health and care for older people. More than 16,000 community members, including older people, were trained to work with older people as health workers, home-based carers, HIV educators or paralegal advisers.

Much of our work is with older people's groups – altogether we supported 2,700 older people's associations with an estimated membership of 300,000, including 400 new groups established to respond to emergencies.

Our emergency work grew dramatically this year. We helped 360,000 older people and their families respond to emergencies in 20 countries. Our largest programmes were in Haiti and Pakistan. We continued to build important partnerships with humanitarian agencies including Merlin, UNHCR, the Red Cross and Médecins Sans Frontières. Age UK has provided vital support, raising over £3 million for our emergency work.

### Making change last

To bring about lasting change, our Affiliates and partners worked with governments to promote new laws and policies on ageing in 29 countries. Affiliates and partners in 51 countries took part in the global Age Demands Action campaign – up from 40 last year.

These activities are producing results. For example, two governments - Colombia and Peru - committed to providing social (non-contributory) pensions for 2.3 million older people. The governments of seven more countries increased coverage of existing pensions schemes to a further 2 million older people, worth an additional £130 million a year. More than half those taking part in Age Demands Action reported immediate results.

We estimate that government policy changes influenced by our Affiliates, partners and older people's groups could help up to 9.5 million older people. In 2011, a priority will be to work with Alzheimer's Disease International and other partners to ensure that the forthcoming UN summit on non-communicable diseases does not neglect older people.

With our Affiliates, we are now operational in 60 countries. Our Affiliates have become more active in leading initiatives for the network. Ten new Affiliates joined the network this year and three more - HelpAge Belize, HelpAge Canada and World Granny in the Netherlands - adopted the HelpAge brand. We produced a new agreement on what affiliation means and the services we provide as a secretariat.

### **Fitter for purpose**

We aim to be a more accountable and greener organisation. We have developed a new accountability framework and produced an environmental handbook which we have piloted in our offices. We are ensuring that more of our plans, reports and evaluations can be viewed online. We are reporting this year against the indicators in our Strategy to 2015, making more effort to be transparent, both about where we have succeeded and where we have not.

With an income of £25.9 million (up by 20 per cent), we have continued to expand, particularly in our emergencies responses. For next year we have secured a new strategic funding agreement with the UK Department for International Development (DFID) and increased support from Age UK. We will continue to work with our European and US Affiliates to build support from the public in their countries. Our relaunched website provides a range of ways for visitors to engage with us, such as donations, campaign action and as a key source of data on ageing policy and practice in the developing world.

We would like to thank our dedicated and experienced staff, Affiliates, partners and the older women and men we work with for making possible the achievements described in this report.



A handwritten signature in black ink, appearing to read 'Tilak de Zoysa'.

**Tilak de Zoysa**  
**Chair**



A handwritten signature in black ink, appearing to read 'Richard Blewitt'.

**Richard Blewitt**  
**Chief Executive Officer**

## Report of the trustees

The trustees present their report and the audited financial statements for the year ended 31 March 2011.

## Our achievements in 2010-2011

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

**Our vision** is for all older people in developing countries to have a secure income.

**The reality** is that the lack of a secure income is one of the biggest problems facing older people. Half the world's older people do not have a secure income, and fewer than one in five people over 60 receive a pension. The majority of the world's older people live in developing countries and cannot realistically afford to save for old age, so they have to work well into their old age, often in insecure, low-paid jobs.

Unless action is taken to improve the situation, we estimate that by 2050 more than 1.2 billion older people will lack a secure income.

#### What are our aims?

We think the best way of achieving income security in old age is for governments to provide universal, social (non-contributory) pensions. We also help older people and their families to earn an income through appropriate work and business.

#### How are we doing this?

**Making the case for social pensions** with governments, donors and the United Nations

**Providing technical training and support to governments** to improve existing social pensions

**Helping civil society** at national, regional and international level to take forward the social pensions agenda

**Helping older people to lobby for new or improved pensions** and monitor the delivery of existing ones

**Improving older people's incomes** through a range of agricultural, vocational and business programmes; providing loans or materials; and working with older people to mitigate the impact of a changing environment

**Building and sharing evidence** on the design, implementation and impact of social pensions.

#### In 2010-2011, we undertook to:

- Improve our work on social protection schemes in fragile states
- Protect older people's livelihoods from shock, seasonal poverty and the impact of natural disasters and climate change
- Support older people affected by migration and dependent on remittances
- Help older people advocate for better access to micro-credit and micro-finance
- Increase the availability of information and evidence on social pensions.

#### Highlights

**2.3 million more older people promised a pension**

**Social pensions put on the manifestos of presidential election candidates in Colombia, Peru, Sri Lanka and Tanzania**

**24 governments designing schemes for social pensions**

**2,300 older people's groups learning to improve livelihoods**

## What did we achieve?

### Better pensions and benefits

Our work with partners has resulted in commitments to provide new social (non-contributory) pensions for 2.3 million older people. A further 2 million older people in seven countries have either become eligible for an existing pension or have received an increase in their pension amounts, worth an additional £130 million a year. Key achievements include:

- New social pension schemes were announced in Colombia and Peru, promising support for over 2 million older people; and in the Philippines, the government started to deliver its new pension, reaching 145,000 older people during its first year.
- The Government of Thailand has changed its temporary pension scheme to a permanent one as a result of our lobbying politicians directly and liaising with advisers to key members of parliament.
- The Government of Vietnam lowered the age of pension eligibility from 85 to 80, bringing an additional 700,000 people into the pension scheme.
- The Governments of Grenada and St Vincent and the Grenadines increased the value of their pensions to counteract the recession in these countries.
- The Government of Rwanda developed and adopted a National Social Protection Strategy.
- The Zambian Government, through its Ministry of Labour and Social Security, embarked on a plan to put in place a universal social pension.
- The Government of Cambodia has developed a draft law on social protection, which has been submitted to the Council of Ministers for endorsement. The draft law recommended that the new Department of Ageing and Welfare works with us to draft several social pension options.
- Advocacy by our partners in Colombia, Peru, Sri Lanka and Tanzania resulted in the presidential election candidates including pensions for older people in their campaigns.

### Technical support to governments

We ran our global social-transfer course in Thailand for a third year, and also provided technical support to government ministries responsible for social protection and poverty reduction schemes in 25 countries. For example:

**Jamaica** The government's Planning Institute of Jamaica included us on its steering committee to develop a policy and plan of action on migration. This followed our innovative programme to support older people affected by migration and our recommendations for increased social protection programmes for remittance-dependent older people.

**Kenya** We provided technical assistance to the government to revise its social protection policy and programmes. We developed tools to implement the Older People's Cash-Transfer scheme and produced a feasibility study to scale it up beyond its present support to 33,000 older people. This work links to our support for older carers of orphans and vulnerable children and the ongoing review of the National Social Protection Policy, supported by DFID, UNICEF and the World Bank.

**Mozambique** The government is now using a community participation model that we developed to better target older people in its cash-transfer programme. We are part of the technical team reviewing the National Social Protection Policy.

### Civil society networks

We supported networks of civil society partners and older people's associations in 29 countries to press for policy change and gain better access to poverty alleviation programmes for older people.

We supported coalitions that campaign on social pensions in Belize, Colombia, Ethiopia, Grenada, Kenya, Thailand and Uganda, and work undertaken by our partners in Ecuador, Paraguay, Peru and the Philippines. For example:



**Colombia** The government announced a new “periodic economic subsidy” (pension) for everyone over 65 living in poverty. This was a result of our partner CONFECOLPEM, the national umbrella association of older people, canvassing presidential candidates and participating in the Age Demands Action campaign.

**Sri Lanka** Our Affiliate HelpAge Sri Lanka continued to lobby for political recognition of the need for a universal old age allowance. These efforts are beginning to show signs of success, with a commitment by the Social Services Minister to an old age allowance for those of 80 years and above, and the inclusion of a National Plan on Ageing in deliberations of the National Social Protection Working Group, of which HelpAge Sri Lanka is now a member.

**Uganda** We supported the national civil society Platform for Social Protection to work with the government on implementing the new national poverty alleviation scheme (SAGE), and helped platform members participate in key events, such as the World Bank Conference on Social Protection Policy and Labour Laws. We also worked with the platform and older people’s associations to run pre-election awareness-raising activities on older people’s issues. As a result, the manifestos of the three strongest parties included older people among the vulnerable groups that need special attention. The winning party’s manifesto includes a commitment to enact a law establishing a national council of older people.

### Improving older people’s incomes

We worked with over 2,300 older people’s associations – with an estimated membership of over 135,000 – to improve and protect older people’s income. With increasing numbers of older people living in the developing world and with social pensions still lagging far behind older people’s needs, it is essential that we continue to grow and improve our practical work to help older people earn a living. Older people’s livelihoods are also under threat from a changing environment. We are working with these groups not only to help establish or improve pension and benefits schemes, but also to support training and provide loans or grants to help them and their families earn a better income. For example:

**DR Congo** Our partner Groupe d'Action pour le Droit trained 500 older people displaced by the current conflict to make briquettes from office waste and sawdust and sell them as a substitute for firewood and charcoal.

**Myanmar** We supported 1,350 members from 30 older people’s self-help groups to re-establish fishing, farming and livestock-rearing activities after the recent cyclone. They used individual loans and created village revolving loan funds to set up income-generating projects such as rice banks, electricity generation, threshers and low-cost transport to provide a continued income.

**Jamaica** Many older people are struggling to cope with the effects of recession and reduced remittance income from family members. We ran an innovative programme for older people and their teenage grandchildren that included training in small business development, providing small loans, and teaching teenagers basic skills to help them get a job – résumé writing, job interview skills and business training. We also taught older people and their families how to apply for credit from the People’s Cooperative Bank and the Jamaica National Small Business Scheme, resulting in 100 successful applications.

**Bolivia** Our partner Sumaj Punchay coordinated a pilot project for members of 34 older-headed household in the high-altitude valleys of Chuquisaca, which are affected by chronic drought. By securing safe water sources for garden plots through aquifer-fed water tanks, they are able to return to cultivating traditional crops as well as growing new types of vegetables. The families have increased their incomes by up to 70 per cent.

**Tanzania** Our support to older citizens’ monitoring groups led 56 out of 133 district councils to adopt programmes and budgetary support for pro-poor services and priorities identified by the groups. Six district councils gave a total of £42,500 for older people-focused projects.

**Influencing regional and international bodies and governments**

We built relationships with key international and regional actors around the world. We provided submissions and consultative support for organisations such as DFID, the European Commission, the International Labour Organization (ILO), Sida, the UN Commission for Social Development, the UN Population Fund (UNFPA), the World Bank and regional bodies. These included the Association of Southeast Asian Nations (ASEAN) Secretariat, the Asian Development Bank (ADB) and a number of Latin American organisations such as the Union of South American Nations (UNASUR) and the UN Economic Commission for Latin America and the Caribbean (UNECLAC). Many of these relationships led to the improvements in the social protection policies and programmes reported here. We expanded our PensionWatch website which attracts interest and contributions from development professionals, academics and others. For example:

**Social protection in East Asia** As a result of our ongoing work in East Asia, the ADB asked us develop country studies for Bangladesh, Thailand and Vietnam and to distil policy lessons for designing and implementing social protection schemes for older people. The papers were the basis of a workshop in the Philippines co-organised with the ADB and Asian governments. This workshop led to an exchange visit by the Nepalese Government and a request followed for us to undertake more detailed work in Nepal.

**Decent work** Our recent report *Forgotten workforce: older people and their right to decent work* explores why older people in low- and middle-income countries work, the types of work they do, and the issues they face in achieving a secure income. Its launch was accompanied by a media report summarising the main findings, which was used by the BBC and *The Guardian* newspaper in the UK.

**Income security** We published *Making a living last longer: insights into older people's livelihood strategies*, a report based on research into the primary income security issues and coping strategies of older people in Bangladesh, Ethiopia, India and Tanzania, with the participation of older people's groups. This report is helping to identify good practice and entry points for future programme and policy work, specifically in tackling older people's challenges in accessing micro-finance.

**Cash transfers in fragile contexts** Our report, *Strengthening state-citizen relations in fragile contexts – the role of cash transfers*, uses examples from northern Kenya, Sierra Leone and Sudan to highlight the significant role that cash-transfer programmes play in shaping the relationship between older people, communities and governments.

**Our plans for 2011-2012:**

Next year we will ensure that governments commit at least an additional £300 million to social pensions and statutory benefits for three million older people. We will explore opportunities for new partnerships on social protection in Indonesia, Sierra Leone and South Sudan and follow up on our work across Asia with the ADB and in Latin America with the new Peru and Colombia pension schemes. We recognise that, to do this, we will need to develop new sources of income, particularly at regional and national levels.

We aim to increase significantly our service delivery work to improve older people's livelihoods and reduce shocks to income security from disasters and environmental change. This area of work expanded less than we had hoped. However, we are expecting stronger growth with new programmes starting in Bangladesh and in our emergency and recovery programmes. We will also begin to use our new risk-reduction approach, which includes improved assessment of vulnerability to environmental hazard and climate change, for new work in fragile states and countries susceptible to frequent natural disasters.

We will develop new opportunities to improve older people's access to credit and financial services from existing providers. In Central Asia, we will address the impact of rapidly expanding informal labour markets and migration on government capacities to provide long-term security in old age.



## Measuring our progress

Strategy to 2015 indicator	Output and outcome indicators	Our targets to March 2011	Our results by March 2011
<b>Global action 1: Enabling older women and men to access a secure income</b>			
Twenty per cent more older women and men 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)	We will deliver assistance in 23 countries	We are now supporting governments in 25 countries (50 per cent of the countries where we work directly or with partners).
	Coverage and value of new or improved social protection schemes (benefits/pensions)	We will work to facilitate and monitor new or improved pensions or benefits in 25 countries	Change was reported in ten countries. Over 2.3 million older people have been promised a pension in Colombia and Peru. Pension programmes were expanded for 2 million older people in seven countries, worth an additional £130 million each year.
Households containing older women and men experience sustained improvements in their income and food security in 25 countries	No. of older people's associations involved in income-generating work	We will be working with 2,100 older people's associations including 59,000 members	We are now working with 2,329 older people's associations with an estimated membership of 135,000. Membership increased substantially in Bangladesh, the Philippines and India.
	No. of older people working to reduce shocks (disaster risk reduction, seasonal poverty, drought, etc)	We will be training and supporting 53,000 older people to reduce shocks to their incomes	We are now supporting 38,000 older people in 18 countries. The expansion of this work in Bangladesh, Cambodia, Kenya, Mozambique and Vietnam has been slower than anticipated, although structures to deliver are now in place.
	No. of older people getting new access to financial services	We will support 30,000 older people to access a loan or financial service, 54 per cent of whom are women	We supported 24,000 older people, of whom 58 per cent were women, to access a loan or financial service in 22 countries. Although our own service delivery has been strong, new lobbying activities to help older people access commercial credit have proved more difficult than anticipated.

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

**Our vision** is for older people to receive good quality health and care services, and to be included in the response to HIV and AIDS, whether at risk of infection, living with HIV or in their role as carers.

**The reality** is that older people in developing countries still have limited access to age-appropriate health, HIV and care services. Governments still fail to invest in training geriatric and specialist health workers or in the infrastructure that could benefit older people's health. Few governments are responding to the needs of an ageing population, and most fail to build services to prevent and treat chronic, non-communicable diseases (NCDs) such as heart disease, stroke, diabetes and dementia.

This investment is made all the more important by the increasing responsibility for care taken on by older people. Older people care for spouses or other family members who are sick, and grandchildren whose parents have migrated for work, or who are ill or have died, for example, because of conflict, AIDS or other illnesses.

### What are our aims?

We want to convince policy makers to include older people explicitly in key policies, strategies, commitments and programmes that respond to health, care and HIV and AIDS, and to persuade them that population ageing has pressing implications for health systems, the delivery of healthcare and its financing.

### How are we doing this?

**Delivering health, HIV and care services** to older people and those in their care

**Training health, HIV and care service providers** to deliver better services for older people

**Lobbying for change in government policy and practice** to recognise and finance responses to older people's health, HIV and care issues and provide them with technical support

**Raising the awareness of international and regional policy-makers** on older people's issues.

### In 2010-2011, we undertook to:

- **Grow our health service delivery work globally**, particularly in relation to NCDs and HIV testing, counselling and treatment
- **Increase our work with health agencies** active in the field of chronic health and NCDs through strategic partnerships
- **Step up support for older people caring for those affected by HIV and AIDS**, through global, regional and national advocacy and by developing new partnerships with larger HIV-focused agencies.

### Highlights

**Health, HIV and care services delivered to 200,000 older people in 35 countries**

**2,000 health staff trained to care for older people**

**7,000 people trained to work with older people as health workers, HIV awareness promoters and home-based carers**

**New health, HIV and care policies in five countries**

**UNAIDS recognises the need to support older carers**

**What did we achieve?****Health, HIV and care services**

We delivered health, HIV and care services to more than 200,000 older people in 35 countries. We helped a further 100,000 older people receive health, HIV or care services as a result of advocacy by our partners and older people's groups. We trained more than 2,000 government and local agency staff in older people's health and a further 7,000 people, including older people, to work with older people as health workers, HIV awareness promoters and home-based carers in 17 countries. For example:

**Healthcare**

- We enabled 48,000 older people to access basic primary healthcare – mainly provided by mobile clinics – to receive attention from a community health worker, or to get the medicines they need.
- As a result of our monitoring of service provision and training health staff to be more sensitive to older people's needs, 47,000 older people accessed government health clinics.
- We facilitated cataract surgery or other eyecare for 36,000 older people. Older people's own advocacy helped a further 6,500 to access these services from government providers.
- Healthy ageing and self-care activities involved 32,000 older people, primarily in East Asia.
- Managing chronic illness, through physiotherapy services or treatment programmes for illnesses such as diabetes, benefited 17,000 older people.
- We helped 24,000 older people and their families to get a clean drinking water supply and 10,000 now also have access to latrines.

**HIV and AIDS**

- We supported 14,000 older people in their role as older carers, mainly in Mozambique and Tanzania. The numbers we are directly supporting have reduced and we are working to find longer-term solutions through our advocacy work in HIV and social protection programmes.
- We provided voluntary counselling and testing services for 5,000 older people. A further 8,500 received services from other providers as a result of local advocacy by our partners and older people's groups.
- Our successful lobbying meant that more than 8,000 older people and those they support received antiretroviral treatments.

**Social care**

- We helped 18,000 older people receive regular homecare by training home-based carers and working with government providers. We supported a further 2,500 older people by funding residential care or by providing daycare centres.
- We enabled 120,000 older people to take part in social activities. Of these, about 40,000 also received counselling and support in their role as carers of family members.

**Improved services for older people**

**India** Our Affiliate HelpAge India is running a new programme funded by Age UK's Sponsor a Grandparent scheme, to improve older people's health. To date, they have set up 43 mobile physiotherapy units, providing services for more than 6,000 older people with arthritic or rheumatic conditions. These services are being complemented in many locations by healthy ageing activities run by older people's groups, such as yoga and meditation. Traditional medical practitioners specialising in homeopathy and *ayurveda* (herbal medicines) are involved in the programme due to their popularity with older people.

**Kyrgyzstan** We helped to bring 25 family doctors, social workers and leaders of older people's self-help groups together to improve the delivery of health and care services to older people with diabetes. We employed an endocrinologist to train and support the groups to produce information materials about diabetes and monitor older people with the disease. The project provided evidence on diabetes and on older people's health expenditure, which will be of use in future advocacy for appropriate and affordable health services and skills for older people. The work was supported by a media and public information campaign.

**Lao PDR** Local events run by older people to raise awareness of their specific health issues have made provincial and district government health staff more responsive to their needs. We also worked with government health staff to train volunteer health and care workers in 20 villages and improve supplies of medicines for older people. We have built clean water supplies to address the high prevalence of diarrhoeal diseases.

**Thailand** Working with our Affiliate, the Foundation for Older Persons' Development (FOPDEV), 22 older people's groups arranged healthy ageing and self-care activities for almost 5,000 older people, including training on home-based care and health entitlements. We also trained groups to submit project proposals for grants from the National Health Security funds administered by local authorities.

**Mozambique** Our Living Together programme in two provinces supported older carers, orphans and vulnerable children (OVC), and people living with HIV and AIDS (PLHIV) in 34 communities. We supported 5,000 older carers, helped to keep more than 9,000 vulnerable children in school, and enabled more than 400 people living with HIV to access treatment at a local health centre. This is a result of work by activists we have trained. They have reduced stigma and brought people living with HIV together to increase the demand for local services and to negotiate with government service providers.

### Government policy and practice change

**Homecare policy in ASEAN countries** The Departments of Social Welfare in Myanmar and the Philippines approved the implementation of its guidelines on home care support for senior citizens, developed with our Affiliate, HelpAge Korea. In Cambodia, the new Department of Ageing and Welfare facilitated the review of its home care guidelines and operations manual to upgrade it to a national standard.

**Bolivia** The Bolivian Government's new Universal Health Scheme risked damaging the progress made under the existing Older People's Health Insurance Scheme. With our partners, Fundación Horizontes and the Bolivian office of the Pan American Health Organization (PAHO), we persuaded the Ministry of Health to reconsider its plans. It has now proposed a National Plan for Older People's Health which could benefit more than 850,000 older people. Follow-up on the implementation of this plan will be crucial.

**Colombia** The Colombian Government announced a revision of the Unified Obligatory Health Plans, which indicate the types of care that are received free of charge through the National Health Scheme. Our partners have been lobbying on this issue for a number of years.

**Ethiopia** The federal HIV and AIDS Prevention and Control Office released its new strategic plan and road map for 2010 to 2015. For the first time, this includes older people and recognises their need for tailored prevention programmes. We estimate that this will benefit about 10,000 older people.

**Mozambique** As part of the design for the government's new HIV and AIDS Strategy (PENIII), we influenced a doubling of the number of indicators relating to older people from the previous strategy. In addition, the UN country report on HIV and AIDS has a section relating to older people's need for specific prevention programmes.

**Tanzania** Following our advocacy, the country's revised HIV and AIDS policy now has a section specifically relating to older people, with an objective "to address elderly specific needs related to HIV in prevention, treatment and societal roles in care for OVC and

PLHIV". Additionally, an indicator was included in the revised monitoring system of the National Strategy for Growth and Reduction of Poverty specifically to measure the percentage of older carers of orphaned and vulnerable children provided with basic external support.

**Vietnam** The Vietnamese Government approved a new health policy which subsidises 50 per cent of the costs of health insurance for poorer households and provides free health insurance for the poorest households, in part a result of the lobbying by our Affiliates.

### **Raising awareness of older people's needs**

**Regional Seminar on Health Promotion and Active Ageing in Asia** We facilitated this conference with UNESCAP, with participants including governments and civil society organisations from 13 countries and international organisations in the field of health and ageing. The objective was to identify good practice, common approaches and priority areas in health promotion and active ageing, with a focus on mitigating the impact of NCDs in older people on national health systems. One output was a recommendation that the implementation of health commitments in the Madrid International Plan of Action on Ageing (MIPAA) should include promoting self-care approaches.

**Global advocacy on care and support in the response to HIV and AIDS** We influenced the UNAIDS strategy to include more on older carers but have further work to do to influence the UN High Level Meeting on HIV and the World Health Organization. Working with the UK Consortium on AIDS and International Development, VSO and Help the Hospices, we organised the first international conference on universal access to care and support. Government and UN officials, donors, and non-governmental organisations from around the world attended. A roadmap for achieving universal access to care and support was developed following the conference, based on the presentations and discussions at the event and guidance from a technical advisory group comprising UN agencies, donors and civil society.

### **Our plans for 2011-2012:**

Our focus will be on the delivery of age-friendly services and the prevention, treatment and management of chronic disease. We will continue to build strategic partnerships at all levels to grow and sustain this work. We will expand our training of health professionals and seek new opportunities to encourage governments to provide older people with fairer access to health services, and to set up or expand their own training of relevant health professionals. We will also promote older people's needs at the UN Summit on Non-Communicable Diseases.

We will continue to lobby for greater visibility for people aged 50 and over in governmental and UNAIDS indicators on HIV and AIDS, and seek a commitment to pilot a set of internationally-used care and support indicators. We will scale up our work in Africa on HIV and AIDS, documenting our evidence of the exclusion of older people from HIV programmes; and we will also work with larger HIV-focused non-governmental organisations to implement our models of practice.

## Measuring our progress

Strategy to 2015 indicator	Output and outcome indicators	Our targets to March 2011	Our results by March 2011
<b>Global action 2: Enabling older women and men and those they support to access quality health, HIV and AIDS and care services</b>			
Older people in 15 countries can prevent and manage chronic illness	No. of countries providing new geriatric/non-communicable disease training for health professionals	We will be working in five countries to train health professionals	We worked strategically in five countries to train health professionals – Cambodia, China, Lao PDR, Mozambique and Vietnam.  Our work provided geriatric health training to 2,500 government or agency health professionals in a total of 17 countries.
Older people in 20 countries receive guaranteed free access to age-friendly health services	No. of older people reporting increased access to health services	We will reach 204,000 older people, of whom 59 per cent are women	We estimate 201,000 older people received improved access to health services, 63 per cent of whom are women.  An additional 195,000 older people benefited from health service delivery in our emergencies programmes, notably in Haiti, Pakistan and Sudan.
Older people in 12 countries receive appropriate HIV and AIDS services	No. of governments increasing access to antiretroviral treatment or support services for older people and family members living with HIV	We will have promoted policy or practice change in five countries	Positive changes have been made in the national policies and plans of four countries – Ethiopia, Kenya, Mozambique and Tanzania – as a direct result of our work. Good progress is also reported in Ghana and Uganda.
Older people receive a range of appropriate primary healthcare services in 25 countries	Total numbers of older people receiving improved access to community-based care	We will reach 17,000 older people, of whom 66 per cent are women	We reached 18,400 older people as a result of our work in 24 countries, 70 per cent of whom are women. Our largest programmes are in India, the Philippines, Tanzania and Thailand.
	No. of older people reporting improved health status (through improved access, service delivery, self-care, improved income, etc)	We will have started monitoring health status of older people in our programmes	A baseline survey from 27 countries estimated that 140,000 older people, 63 per cent of whom were women, would report improved health status as a result of our work.



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

**Our vision** is that older people affected by crises and disasters receive the assistance and protection they need, in accordance with humanitarian principles.

**The reality** is that, although older people have specific needs and also the potential to contribute to relief efforts, there are only a few programmes that target them specifically and so they continue to be left out of all stages of emergency preparedness, assessments and responses.

About 350 million people are affected by crises and disasters every year, meaning about 35 million older people – about 10 per cent – need assistance. Older people also make up a large proportion of the people in displaced people's camps who are left behind in resettlement programmes. Sixty per cent of the world's older people live in developing countries where disasters are more likely to occur and have the biggest impact. Demographic change also means their numbers are growing fast.

Yet our research shows that humanitarian donors do not allocate funding in proportion to need and that older people receive disproportionately little – just 0.2 per cent. Very few emergency responses provide healthcare or support for the diseases older people are living with. This puts them at greater risk and increases their isolation. In recovery, older people need continued psychosocial and financial support, with age-appropriate work or micro-finance opportunities, but they rarely receive it.

### What are our aims?

We want humanitarian policy makers and aid workers to understand how humanitarian crises affect older people and to provide an appropriate level of funding for relief and recovery efforts for older people. All humanitarian organisations must include older people in their emergency responses, in accordance with humanitarian principles.

### How are we doing this?

**Responding to the needs of older people in emergencies** and supporting their own recovery efforts afterwards

**Influencing other humanitarian agencies** to take account of the needs and capacities of older people

**Building understanding of preparedness and risk reduction** with our partners, older people and their communities.

### In 2010-2011, we undertook to:

- **Review our work on healthcare in emergencies** to improve our programmes and policy engagement
- **Develop a training programme** on older people in emergencies for other agencies and our own network
- **Increase our advocacy** for greater inclusion of older people in humanitarian programme financing
- **Improve our ability to respond effectively and quickly** through better internal procedures and the creation of a rapid-response standby roster.

### Highlights

**360,000 older people and their families received emergency relief and recovery support in 20 countries**

**180,000 older people received healthcare following the Pakistan floods, in partnership with Merlin**

**Médecins Sans Frontières, Merlin, the Red Cross and UNHCR are doing more for older people**

**What did we achieve?****Responding in emergencies and early recovery**

Over the past five years we have invested in building strategic partnerships, and in strengthening our own capacity and that of our network to respond to the needs of older people in emergencies. This year, for example:

- We worked with 34 national and international partners to respond to the needs of more than 360,000 older people and their families in 21 countries.
- There were 640,000 incidences of older people and their families receiving services as a result of our work – a 50 per cent increase on last year.
- We responded to floods in nine countries including Bolivia, Colombia, Ethiopia, Pakistan and Sri Lanka. We supported early recovery from natural disasters in Indonesia, Haiti, Myanmar, Philippines and Vietnam.
- We worked in nine countries or regions affected by conflict, which included Colombia, Darfur, DR Congo, Kyrgyzstan and the occupied Palestinian Territories (Gaza).
- With the British health NGO Merlin, we trained more than 2,000 health staff in Pakistan to understand older people's health needs and provided health services to 180,000 older people.
- We trained 3,380 government and NGO staff to support the needs of older people in emergencies.
- We increased spending on emergencies, recovery programmes and policy work from £5.2m to £9.4m. Our partnership with Age UK and the Disasters Emergency Committee (DEC) was critical to this growth.

Our responses to emergencies included:

**Pakistan floods** We worked in Khyber Pakhtunkhwa, Punjab and Sindh provinces with Merlin, to provide help to 180,000 older people. This included providing health services and cold weather and personal kits containing bedding, torches and food. With Merlin and the Ministry of Health, we ensured that 17 health centres provided free consultations, eyecare, counselling and health education to older people. As the floods subsided, we established 20 older people's associations to support older people's recovery efforts. Through these associations we have provided cash grants to 1,200 older people and their families to buy food, repair houses, pay off loans, start small businesses and replace tools or livestock lost in the floods.

**Haiti earthquake** Since April 2010, we have supported 12,000 older people in temporary camps, providing healthcare, mobility aids and eyecare as well as solar panel kits with a radio and lamps for their security. We distributed tents and tarpaulins to older people and their families in 17 camps. Following the cholera outbreak, we trained 240 volunteers in hygiene and cholera awareness and control in 93 camps. Provision of health services and nursing care has been a major component of our work and our partners arranged medical consultations for more than 9,000 older people. We set up a 35-bed emergency medical facility for older people, in partnership with a privately-run, state-owned hospital, to care for more than 700 older people.

**Sri Lanka floods** In partnership with HelpAge Sri Lanka, we distributed household items and provided medical services in eastern Batticaloa and Ampara districts, where more than 90,000 people were displaced after the heaviest rains in 30 years. We provided healthcare to about 2,500 older people and distributed 16,000 items to older Sri Lankans and their families.

**Ethiopia floods** With our partners, the Gayo Pastoral Development Institute and the Aged and Children Pastoralist Association, we responded to the flooding in southern and eastern parts of the country in May 2010. We repaired water sources, small irrigation schemes, houses and latrines, as well as providing basic household goods. This helped 16,400 people who live in mostly older people-headed households.

**DR Congo** We set up two age-friendly centres for 15,000 older people and family members, many of whom have been displaced by the conflict, to run social, recreational and income-generating activities. We provided health services, medicines and eyecare and ran HIV awareness campaigns. We trained more than 100 medical staff from other agencies and governments to understand older people's health needs.

**Colombia** We worked with our partners, Fundación Paz y Bien and Fundación Red de Desarrollo y Paz de los Montes de Maria, to support older people affected by the ongoing conflict. In the west, we provided legal advice and psychosocial support to more than 2,500 older people and their family members who have been displaced to urban areas. We helped them to receive practical support – household goods, shelter and health services – from the government's displaced persons unit. In the north of the country, older people's groups and our partners responded rapidly to flooding, helping those affected to register for government support, and distributing household goods and water to more than 200 older people.

**Kyrgyzstan** We carried out an assessment of older people's needs during the violent conflict in Osh and Jalalabad. This revealed that older people were physically isolated and lacking support. We provided 5,000 older people and family members with practical, legal and psychosocial support and helped them to replace lost documentation. We undertook innovative work with a local debit card company to deliver regular cash transfers to older people.

### Stepping up the quality of our work

As our programme grows, we are committed to ensuring that our work is of the highest quality and we have continued to review and expand our portfolio of operational guidelines. This year we revised our Emergencies Manual and developed new guidelines for using cash transfers in emergencies, for vulnerability assessment and for assessing environmental hazards and risk. We have now created an emergencies roster of personnel available at short notice.

We became a member of the Humanitarian Accountability Project (HAP), and piloted our new Accountability Framework in Haiti.

### Changing attitudes globally

**Inter-Agency Standing Committee (IASC) on Humanitarian Reform** We continued our work with the UN and non-governmental agencies of the IASC. We reviewed IASC members' progress towards integrating older people into their policies and programmes. Based on this review, and requests for greater support from the IASC agencies, we will establish a full-time presence in Geneva to ensure that we can provide greater support to these agencies.

**Sphere Project's Humanitarian Charter and Minimum Standards in Humanitarian Response** We contributed to the new guidelines now released, and ensured that age and vulnerability were included in these standards.

**Humanitarian financing for older people** Our research report revealed that only 0.2 per cent of funds in UN appeals was allocated to projects that included an activity specifically targeting older people. Our report, *Humanitarian financing for older people*, was cited in the British Government's Humanitarian Emergency Response Review (HERR), which stated that the humanitarian system is poorly equipped to ensure an equitable response for the most vulnerable. The HERR findings and citation of our work, together with the visible impact of the recent crisis on older people in Japan, will help to make the needs and capabilities of older people more central to humanitarian responses.

### Strengthening global and national partnerships

The increasing willingness of major humanitarian agencies to work with us shows that we are changing attitudes. For example:

**UNHCR and the Global Protection Cluster** We provided three field secondments to the Protection Clusters in Kyrgyzstan, Pakistan and Yemen under a new sub-grant agreement

with UNHCR. We worked closely with UNHCR and the Ministry of Social Protection in Colombia to develop guidelines for displaced older people in the country.

**IFRC and the Global Shelter Cluster** The IFRC commissioned us to produce guidance for the Shelter Cluster on age-appropriate shelter. This has now been disseminated.

**British Red Cross** We now have an agreement to collaborate in Bangladesh and Haiti.

**Merlin** We signed a global agreement to collaborate on operational and policy work and responded together to the floods in Pakistan.

**Handicap International** We have started working together to develop resources for vulnerable groups.

**Médecins Sans Frontières** Following the cholera epidemic in Haiti, we agreed to collaborate on a study of the impact of cholera on older people.

### Building preparedness and risk reduction

We influenced national disaster risk-reduction policies and plans to include older people. We contributed to the policies of regional bodies such as the Pan American Health Organization (PAHO) and the ASEAN Secretariat. We are working on preparedness planning at district level and above in 20 countries. For example:

**Caribbean** We are a member of the Caribbean Disaster Emergency Management Agency's (CDEMA) civil society sub-committee, which is preparing a workplan for the region that includes older people. We trained five of our partners from Belize and Jamaica to produce organisational disaster plans, including first aid, logistics and managing distributions. Local disaster risk-management plans are now in place in our partners' project communities.

**Bolivia** We worked as part of a consortium of five agencies including OXFAM GB, UNDP, local agency FUNDEPCO and the municipal government of La Paz to run a disaster risk-reduction programme for the capital. We specifically supported 15 older people's groups ("white brigades") to contribute to the municipal emergency coordinating committee.

**East Asia** As a governing board member on the ASEAN Partnership Group, we worked to include older people in regional disaster preparedness plans and to promote their inclusion in national responses. In particular, this has helped to fund the work of our Affiliate the Coalition of Services of the Elderly (COSE) in the Philippines. We have supported COSE and our partners in Vietnam to produce local disaster risk reduction plans. We strengthened ties with the ASEAN Agreement on Disaster Management and Emergency Response (AADMER) secretariat and with The Leprosy Mission International (TLMI) in Myanmar.

**Latin America** We were invited to contribute to three sub-regional workshops on gender and disaster response by the International Organisation on Migration (IOM). The result was a final report which includes issues for older people and is to be presented to the General Assembly of the IOM.

**The Assessment Capacities Project (ACAPS)** This is an initiative of a consortium of three NGOs (HelpAge International, Merlin and the Norwegian Refugee Council), supported by seven major humanitarian donors, to improve the quality of humanitarian responses by supporting faster and more effective needs assessments. It works with a number of UN and INGO groups, including the IASC Needs Assessment Task Force.

ACAPS ran training programmes to help humanitarian staff carry out better multi-sector assessments. It supported the emergency assessments in Haiti and Pakistan and carried out studies on the preparedness of humanitarian actors, including governments, to respond to crises in Bangladesh, Bhutan, Indonesia and Mongolia.

### Our plans for 2011-2012:

We will assist older people in 13 countries, including the recent responses in Pakistan and Haiti, and we will expand our emergency and preparedness programming in Ethiopia and Kenya.

We will support older people and their families in new sudden-onset emergencies. In fragile states and countries experiencing complex political emergencies, we will respond to emergencies and strengthen our programmes.

We will strengthen our technical expertise and evidence by focusing on interventions in protection, livelihoods and health and improve our analysis of vulnerability and risk. We will use a global emergencies workshop to share and document our experiences in emergencies. We will identify key areas where our responses to date have been effective, and look for new opportunities. We will review the outcomes of health and training consultancies done this year.

We will continue to encourage the international humanitarian agencies which we have targeted to integrate ageing into policy and practice, focusing particularly on members of the IASC.

## Measuring our progress

Strategy to 2015 Indicator	Output and outcome indicators	Our targets to March 2011	Our results by March 2011
<b>Global action 3: Enabling older people to actively participate in and be better supported during emergency and recovery situations</b>			
Older women and men 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	We will be providing responses in at least 13 countries	We responded to emergencies in 20 countries. Our largest responses were in DR Congo, Ethiopia, Haiti, Myanmar, Pakistan, the Philippines and Sudan. We also provided funding to support the tsunami response in Japan.
	Total numbers of people benefiting from emergency response and recovery programmes	We will reach at least 181,000 older people in emergencies, of whom 57 per cent are women	Our responses reached 360,000 older people, 56 per cent of whom were women. Our largest intervention was in the delivery of health services to 180,000 older people in north-western Pakistan, with our partner Merlin.
Ten major humanitarian agencies recognise and respond to the needs and capacities of older women and men in emergency preparedness, response and recovery	No. of countries where we work to improve national disaster preparedness and response plans	We will have established programmes in 18 countries	We now work within disaster preparedness structures, at least at district level, in 19 countries.
	No. of humanitarian agencies that specifically respond to older people's needs in their policy and programmes	We will have achieved substantive work on organisational practice and field operations with three international agencies	We now have strategic engagements to develop the policy and practice of six international agencies: British Red Cross, Handicap International, IFRC, Médecins Sans Frontières, Merlin and UNHCR.



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

**Our vision** is to end age discrimination and see the rights of older people recognised, promoted and protected in national and international law and in practice.

**The reality** is that there is no international human rights convention which specifically protects the rights of older people. The existing human rights system does not adequately address this issue, nor are older people's rights fully integrated into other developmental or government policies.

The 2002 Madrid International Plan of Action on Ageing (MIPAA) provides a commitment by all UN member states to include ageing in all social and economic development policies, and to halve old-age poverty by 2015, in line with the Millennium Development Goals.

However, adoption of MIPAA's requirements continues to be disappointingly low and governments have made few attempts to consult older people about their needs and potential contributions. Only a handful of governments have concrete plans to implement the proposed policies and even fewer are providing dedicated resources to pay for them.

### What is our aim?

We want the rights of all older women and men to be protected and respected. Article 1 of the Universal Declaration of Human Rights states that "all human beings are born free and equal in dignity and rights". This right applies to everyone, whatever their age.

### How are we doing this?

**Training older people's groups** and their communities to work on specific legal and rights issues, and to monitor the delivery of government services and poverty reduction programmes

**Providing leadership, opportunities, information, resources and campaigning platforms** to allow older people to claim their rights and entitlements and fight age discrimination

**Influencing the UN rights system and governments by providing evidence of specific rights violations**, particularly against older women, to ensure that older people's rights are better protected in law and in practice

**Building a growing movement of individuals around the world** willing to support the cause of older people and improving their access to information on older people's issues through our social networking channels and website.

### In 2010-2011, we undertook to:

- **Build robust evidence of age discrimination** with our partners and mobilise groups to tackle older people's rights issues and protect older people
- **Increase our submissions to the UN rights system** including the Committee on 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
- **Mobilise more individual supporters** from around the world.

### Highlights

*A UN working group on older people's rights has been created*

*950 older people's associations are monitoring older people's access to services and entitlements*

*300 groups of older people trained to take up cases of abuse and discrimination*

*CEDAW calls on all governments to protect the rights of older women*

*10,500 individual supporters in the UK have signed up to support our mission for older people*

**What did we achieve?****Supporting older people to combat discrimination**

Working with older people, we trained:

- 950 older people's associations to monitor their access to services and entitlements
- 300 groups and paralegals who have mobilised more than 50,000 older women and men to take up cases of abuse and discrimination.

We worked with local health staff to ensure that older people were treated, negotiated with local councils to get essential services subsidised and helped older people register for a pension. In the communities where we work, we estimate that older people's groups helped some 200,000 older people to receive services and 80,000 older people to register for key health benefits and other entitlements.

Older people's groups gave information to their peers and their communities on services and entitlements available to them. They also provided health and HIV education and worked to reduce abuse of older people in their communities. For example:

**Bolivia** We supported the network of older people's associations, ANAMBO, which now has almost 125,000 older members and is estimated to reach 52 per cent of older people in Bolivia. ANAMBO engages with the government on improving implementation of the older people's health insurance scheme, on documentation issues and on new national laws and municipal "older people's charters". ANAMBO's national executive committee has presented proposals to the five government working groups within the national Ombudsman's office.

**Burkina Faso** As part of our women's rights programme, we trained 60 paralegal clubs with a total of 600 members. They work on individual cases of abuse or illegal practices against older women. They also mobilise community campaigns to challenge the social exclusion of and violence against women. Although the process of changing these practices is slow, we are seeing positive effects. The campaigns caused the Chief of the Moora tribe to issue a statement denouncing witchcraft accusations and to call on other traditional leaders to do the same.

**Kyrgyzstan** We continued to improve relations between community members and their community police forces. A study showed that initially only 5 per cent of older women and men trusted the police and the remainder said they would not turn to a Neighbourhood Inspector for help. After five months, 65 per cent of the same older women and men said they would turn to their Neighbourhood Inspectors when they needed help. Following the success of this programme, we have received further funding to expand the work.

**Tanzania** We trained media representatives to build a national movement to combat abuses against women, such as witchcraft killings, inheritance theft and property grabbing. Working with older people's groups from Sukumaland, we developed journalists' understanding of rights violations against older people, particularly older women. As a result, more than 200 newspaper articles, 13 radio programmes and 12 television programmes reflected incidents of elder abuse and older people's concerns. The media has also supported the calls by older people to see the National Ageing Policy brought into force.

**Uganda** We trained members of older people's associations in northern and western Uganda to monitor the implementation of the government's poverty alleviation programme. We also provided training to 22 community paralegals to help with more difficult registration or legal issues. As a result, older people in the western Rwenzori region have started accessing the Luwero-Rwenzori development fund, HIV and AIDS testing and counselling services, and government agricultural services and funds.

## Lobbying the UN rights systems and governments

### Existing UN rights systems

We submitted evidence to the UN of the violation of older people's rights, both globally and in specific countries, to call governments to account for their actions and support the case for an international convention on the rights of older people. Our work led to the following actions:

- The Committee on the Elimination of All Forms of Discrimination against Women (CEDAW) adopted a general recommendation on older women's rights, which requested that every country reporting to it provide information on older women's rights.
- The UN Commissioner for Human Rights called for better protection of the rights of older people, a resolution by the UN General Assembly, and the establishment of the UN Open-Ended Working Group on Ageing. We were the only civil society organisation asked to attend the first session of this group in April 2011.

We submitted seven reports from five countries on violations of older people's rights to CEDAW, the Council for Economic, Social and Cultural Rights (CESCR) and the Universal Periodic Review of the UN Human Rights Council. These bodies in turn hold individual governments to account on their progress in reducing rights violations. We also provided a report for the UN Special Rapporteur on Health's consultation on older people's right to health.

Our submissions on violations in these countries included the themes of older women's rights, social security and pensions, and the individual rights of older people under law. We are pleased that our partners in the countries concerned – Burkina Faso, Moldova, Tajikistan, Tanzania and Uganda – made significant contributions to our evidence and the drafting of the final submissions.

### Working towards a convention on the rights of older people

A survey by our partners as part of the global Age Demands Action campaign indicated an almost universal wish by older people for a global campaign for a convention. We have started working with Age UK to establish an international coalition to call for a convention. We have set up a rights group to formulate a strategy and action plan. The establishment of the UN Open Ended Working Group on older people's rights has provided the opportunity for member states to discuss the feasibility of a new convention and, as the only civil society member of the Working Group, we are calling for a convention.

### Strategic partnerships

We developed our strategic partnerships with key organisations:

**Alzheimer's Disease International (ADI)** We developed a partnership with ADI, and issued a joint statement on the need to include ageing issues such as dementia in the forthcoming UN Summit on Non-Communicable Diseases. We are also exploring areas of joint programming in the Caribbean, Central Asia and Latin America.

**The Burnet Institute of Medical Research in Australia** The Institute helped us convene a global workshop on healthy ageing. They have now established the Healthy Ageing Research Hub for Asia and the Pacific to work on research, advocacy and capacity building for healthy ageing.

**The Caregivers Action Network (CAN)** Founded by HelpAge, VSO, Cordaid and the Huairou Commission, the network was launched and presented events at the International AIDS Conference in Vienna in July 2010. CAN has positioned itself globally as the expert on care and support, with UNAIDS and other agencies coming to us for information and guidance.

**Pan American Health Organization (PAHO)** We continued our joint work to implement the PAHO regional plan of action on ageing and health in the Andean region of Latin America. We collaborated with the Ministries of Health from Bolivia, Ecuador and Peru, and with our

partners CAPIS, CIEN, Fundación Horizontes, Pro Vida Perú and Universidad Quito to disseminate the plan and integrate it into national policies.

**Swedish International Development Cooperation Agency (Sida)** We confirmed a new three-year agreement for £4.7 million to strengthen social protection and mitigate the impact of HIV and AIDS and poverty in sub-Saharan Africa. Sida is also funding a strategic programme in Bolivia. We are now discussing how to promote ageing issues in Scandinavia.

**UNDP** We co-facilitated a seminar on ageing and development with the UNDP Human Development Report Office. We are hopeful that this will lead to the addition of new indicators in the Human Development Report, including life expectancy at 60, and the inclusion of ageing issues in the global and national reporting process.

**UNFPA** With funding from UNFPA we compiled information from 133 countries on how the provisions of MIPAA were being implemented. This led to further funding from UNFPA to hold consultations with older people across the developing world to feed into a *State of the World's Older People* report in 2012.

**UNICEF and Soros Foundation** We signed an agreement with these organisations to develop a national survey to establish the scope of "skipped-generation" households in Kyrgyzstan, and to provide data on their situation and their vulnerability.

### **Movement of individual supporters**

We began working with our Affiliates and partners to build a list of registered supporters for our cause. This ambitious project aims to see one million people worldwide work supporting our advocacy for older people to be treated more fairly.

The number of HelpAge supporters increased by 20 per cent to 10,500, mainly as a result of our investment in technology, use of social networking, and more intensive work with Affiliates and partners to develop campaigns. Our new website allows us for the first time to collect details of people signing petitions online. Our social networking sites have been particularly successful, connecting us to other groups with a much wider membership. These include the US Huffington Post (690,000 followers), AARP (2,250 followers) and the Disasters Emergency Committee (3,840 followers), who now regularly use our Facebook and Twitter pages and our website. We have received excellent feedback on the new website and will continue to evaluate and improve it.

### **Our plans for 2011-2012:**

We will support an increasing number of older people's associations to manage projects and to lead on action to include older people in services. We will help our partners and networks of older people's organisations to advocate for policy and practice change by governments and to collect evidence of the violations of older people's rights, age discrimination and their exclusion from services. Our aim is to support at least 50 per cent more older people's associations to monitor provision of services by government and other agencies and to achieve a 75 per cent increase in the number of older people being helped to access a service or entitlement.

In the absence of a UN convention on the rights of older people, we will promote the protection of older people on the part of individual governments by influencing existing UN mechanisms including CEDAW, the Universal Periodic Review (UPR) of the UN Human Rights Council, the new UN Open-Ended Working Group on Ageing, and UN Women. In particular, we will contribute to the work of the UN Special Rapporteur on the right to health and lobby the Human Rights Council on the right to palliative care.

With our Affiliates, we will continue to publicise older people's issues and provide the information and resources to help individual supporters worldwide to take action with and for older people.

## Measuring our progress

Strategy to 2015 indicator	Output and outcome indicators	Our target for 2010 – 2011	Our results by March 2011
Global action 4: Building global and local movements that enable older people to challenge age discrimination and claim their rights			
Older women and men lead community action to realise their rights to services and practical support in 25 countries	Overall number of older people's associations we worked with	We will be working with 2,637 older people's associations	We are working with 2,700 older people's associations, with an estimated membership of 300,000. This includes the membership of the older people's network in Latin America. An additional 400 groups have been established in our emergencies programmes.
	No. of older people's associations monitoring government service delivery	We will have established 930 older people's associations with a membership of 33,000	950 older people's associations have been established in 20 countries, with a membership of about 45,000.
	Total number of older people assisted to claim existing entitlements	We will be assisting 65,000 older people, of whom 60 per cent are women	80,000 older people were helped to gain entitlements in 20 countries, 66 per cent of whom were women.
Older women and men 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	We will have programmes in nine countries	We are working in nine countries on issues of specific abuse or discrimination, including protection of older women against physical abuse and of their financial and property rights.
	No. of older people taking action locally around specific rights abuses and exclusion from services	We will be working with 57,000 older people, of whom 56 per cent are women	We estimate that 53,000 older people were mobilised to take action, 58 per cent of whom were women; however, we need to improve our methods of measurement next year.
	No. of countries where HelpAge is producing reports to the UN or other rights mechanisms	We will produce seven reports from five countries	We submitted seven reports to CEDAW, CESC and the UPR of the Human Rights Council. We also submitted a report to the Special Rapporteur on the right to health.
A global group of one million committed supporters is developed by key HelpAge Affiliates	Progress on a UN convention on older people's rights	A coalition of age-focused NGOs and networks will be established to lead on mobilising support for a convention	An international coalition has been established by Age UK and we submitted a call for a convention to the UN Open-Ended Working Group on Ageing.
	No. of supporters taking action on global ageing issues	We will have 10,000 committed supporters in the UK and will work with Affiliates to grow this number	The number of supporters on the HelpAge database is now 10,548, a 20 per cent increase on the previous year. We estimate that there are a further 50,000 committed supporters on our Affiliates' databases.



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

**Our vision** is a global network of organisations raising awareness and realising the rights of older people, and bringing technical expertise and funding to solve older people's issues, with their participation.

With almost 500 million older people living in middle- and low-income countries, a network of age-focused organisations is essential. Our Affiliates and partners are powerful agents of change in their home countries. They provide much-needed services and lobbying, and demonstrate the critical contribution that older people make.

HelpAge was founded to build a global network of organisations working on ageing issues and promoting the rights of older people. This role is unique. We are encouraging organisations to join the global movement supporting older people. Together we will highlight the largely-ignored realities of major demographic change, which is resulting in larger older populations.

### How are we doing this?

**Increasing our impact** by strengthening and growing the HelpAge International network and by working in partnership with other organisations

**Encouraging and supporting our Affiliates** to increase their leadership in our areas of work and our shared advocacy agenda

**Providing leadership in global campaigning platforms** such as Age Demands Action and national and regional reviews of MIPAA, and working to develop new campaigns

**Increasing awareness of ageing and development** by raising the profile of our network and the issues it seeks to address

**Ensuring the expansion and strengthening of the network and its engagement with HelpAge**, including developing a stronger network in OECD countries and the emerging economies of Brazil, China, India, Russia and South Africa.

### In 2010-2011, we undertook to:

- **Increase the number of Affiliates** and build their understanding of HelpAge's values and obligations
- **Support a common agenda with Affiliates** to lead national, regional and international initiatives
- **Support the specific needs of our northern Affiliates** to promote ageing issues and increase their fundraising capacities.

### Highlights

**Age Demands Action campaigned on older people's rights in 51 countries this year**

**New or revised government policies on pensions, health, HIV, care and ageing influenced by our network could help up to 9.5 million older people**

**Our network of Affiliates grew by 10 members to 88**

*We welcome:*

*Bangladesh Women's Health Coalition (BWHC), Bangladesh*

*Vukoxa, Mozambique*

*IPEMIN, Peru*

*Fundación Horizontes, Bolivia*

*Centro Proceso Social, Peru*

*Centro de Asistencia y Promoción Integral de la Salud (CAPIS), Peru*

*Dominica Council on Ageing, Dominica*

*Vietnam Association of the Elderly, Vietnam*

*Research Centre for Ageing Support (RECAS), Vietnam*

*Yayasan Emong Lansia (YEL), Indonesia*



**What did we achieve?****Stronger network**

- Ten organisations became new Affiliates, bringing the total to 88.
- Three Affiliates committed to sharing our values as “sisters” – HelpAge Belize, HelpAge Canada, and WorldGranny, bringing the number of sister Affiliates to nine.
- We finalised a new network package of mutual obligations.
- We raised the profile of our Affiliates on our website and developed a plan to exchange best practice.
- We supported all our sisters to re-design their visual identity and helped HelpAge Spain and HelpAge USA launch new websites.
- We completed organisational capacity assessments with all our Africa Affiliates to facilitate planning for their institutional development.

**Affiliates as leaders**

We are working to strengthen the role that our Affiliates and partners play in their home countries and in support of our global and regional work. With our Affiliates, we are now operational in 60 countries and we are developing work or partnerships in a further seven. Our partners and Affiliates manage programmes independently in over half the countries where the network is present – 35 developing countries. In a further 11 countries we provide technical and fundraising support for our Affiliates.

**Leadership in the network programme**

- **Age UK** provided us with a strategic grant of £5.4 million this year, and continues to support our emergencies work as a member of the Disasters Emergency Committee (DEC). It advocated for the inclusion of Kyrgyzstan and Tajikistan on the DEC list of countries experiencing complex political emergencies. It also committed over £1 million in 2011-2012 to build our work in fragile states and made a significant investment in public fundraising activities for international work.
- **HelpAge Korea** led and funded our regional homecare programme in East Asia.
- **Tsao Foundation** led on the formulation of regional self-care initiatives in East Asia, submitting proposals on behalf of partners in the region.
- **AgeNet** represented Central Asian older people’s organisations at the Inter-Parliamentary Assembly of Member Nations of the Commonwealth of Independent States (CIS). The Assembly agreed a number of recommendations for action by the member states.
- **European and US Affiliates** HelpAge Germany, HelpAge USA and WorldGranny raised funds for our work on emergencies, social pensions and income security.
- **Cordaid** entered a joint partnership with HelpAge to develop policy on income security and social protection in South Asia and East Africa. It has mobilised funding from the Dutch Government on our behalf for this purpose.

**Support to programmes**

- **ALA Dominicana** (a partner in the Dominican Republic) provided a base and logistical support for our work in Haiti.
- **Coalition of Services of the Elderly (COSE)** (the Philippines) organised workshops on communications in emergencies and a network capacity-building workshop run by our partner, Fredskorpset Norway.
- **Council on the Ageing** (Australia) facilitated regional and global meetings on health and ageing and supported our access to leading ageing and health academics in Australia.
- **HelpAge Ghana, HelpAge Kenya and the Senior Citizens’ Association of Zambia** supported our Linking Lives development awareness programme in Europe.

- **Vietnam Association of the Elderly** co-hosted and co-funded a regional meeting of older people's association leaders.
- **Our global ambassadors** spoke at events which included the global meeting of the International Federation on Ageing in Australia and the regional Red Cross review in Vienna. The seven ambassadors are recognised internationally as experts on ageing.

## Leading campaigns

### Age Demands Action

We have worked to influence policy in 29 countries and brought changes in ten countries that could improve the lives of up to 9.5 million older people. Achievements include new national ageing policies in Ghana and Grenada.

This year, our partners ran Age Demands Action campaigns in 51 countries in Africa, Asia, the Caribbean, Europe and Latin America. More than half those involved said that the campaign had achieved an immediate change for older people in their country. All our partners reported that it had helped to build older people's capacities and confidence to campaign. For example:

- Following a march of more than 1,000 older people in Sri Lanka, the Minister of Social Services promised to implement a new allowance of 2,000 rupees (£11) per month for all people over 75 years not currently receiving benefits from the government.
- In Kenya, the Permanent Secretary agreed to increase the amount of cash transfers for older people and to expand these payments beyond the existing 44 districts.
- Following the formation of a human chain by hundreds of older people in Bangladesh, the Social Welfare Minister promised to increase the old age allowance in next year's budget and to reopen six older people's homes in the country.
- In Vietnam, the government is introducing a health equity fund to provide free healthcare for the poorest older people, following campaigning by our Affiliates and partners.
- The Nepalese Prime Minister signed the Age Demands Action petition and expressed his commitment to older people's rights.
- The Minister of Labour, Social Protection and Family in Moldova pledged that the social pension will reach the minimum subsistence level for older people in the country.

### Development awareness and policy change in Europe

We carried out development awareness activities across Europe and with the European Commission, focusing on social protection and decent work for older people. We worked with the European Working Group on Social Protection and Decent Work in the European Commission's Development Cooperation section in Brussels.

**EU policy** We made successful contributions in support of social protection in a number of European Commission policy processes, including the green paper on EU development policy in support of inclusive growth and sustainable development and the European Report on Development 2010.

**Linking Lives project** This project is tied in with our Age Demands Action campaign. It aims to create online and personal contact between older people in Africa and members of the public and governments in Europe, particularly in the Czech Republic, Ireland, the Netherlands and Slovenia. A total of 1,500 Europeans signed a petition asking the President of the European Council to recognise older people in EU aid policies and guidelines. The President of Slovenia, Danilo Turk, also signed the petition. A supporting paper entitled *Europe: Lead the Way* was used at public events, exhibitions and government meetings.

**Decent work** We led a successful joint policy event with members of the European Parliament's Development Committee, European civil society organisations, international

organisations and European Parliament staff to promote older people's right to decent work, using our report, *Forgotten workforce: older people and their right to decent work*.

We worked with members of the International Trades Union Congress to promote the issues of migration, mobility and employment within the European Union's Africa strategy. Together we highlighted the issues of older people and work at the European Working Group inter-continental workshop in Brussels and at a joint European Union/African Union workshop in Nairobi.

**Our plans for 2011-2012:**

We will encourage more organisations committed to the cause of older people and ageing to join our network. We anticipate that these will include at least six organisations from developing countries and we are working to interest others, particularly from Scandinavia.

With our network, we will promote laws, policies and plans to the benefit of older people across the world. We will launch at least one new global campaign and expand our Age Demands Action and Linking Lives campaigns.

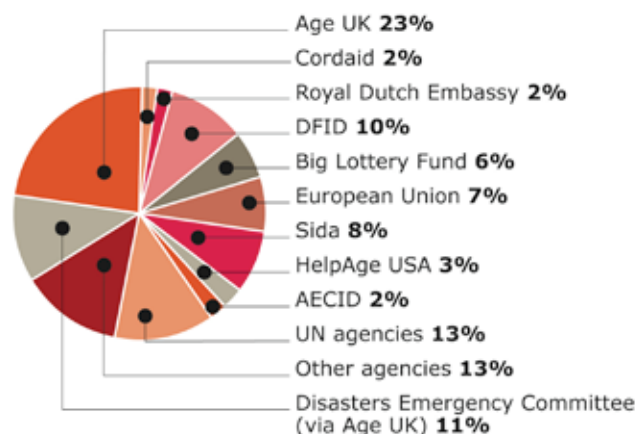
We will encourage our Affiliates and partners to collect compelling evidence from older people to feed into the ten-year review of MIPAA in 2012, and further examples of rights violations of older people to strengthen the case for a convention.

## Measuring our progress

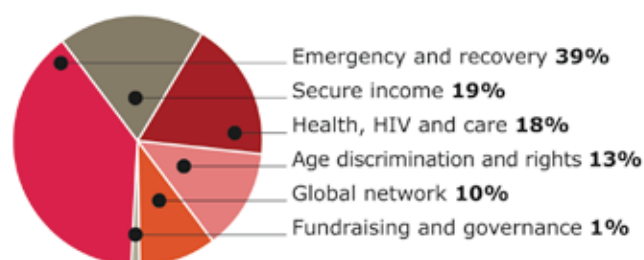
Strategy to 2015 indicator	Output and outcome indicators	Our target for 2010-2011	Our results by March 2011
<b>Global action 5: Supporting a growing global network of organisations to improve their work with and for older women and men</b>			
120 Affiliates, adopting HelpAge values and visual identity, form a global network shaping and supporting a common agenda and leading national, regional and international initiatives	No. of Affiliates	Growth to 80 Affiliates	Our network grew by 10 Affiliates to 88 Affiliates.
	No. of partners taking on lead role in network initiatives	Establish clear action plans with Affiliates for their specific roles in our work	Seven Affiliates are supporting major programme or fundraising initiatives. Many more have provided practical support and participated in specific network activities or programmes.
	No. of countries where our partners are leading the network programme	Our partners will lead and implement our work in 35 countries	New indicator – no change reported this year. A strategic review of the geography of our work was completed for action in the coming years.
Global and national campaigns take place in 50 countries to demand changes in laws and policies to respect the rights of older women and men	No. of countries where older people are involved in national level action for improved services	Our Age Demands Action campaign will be run by partners in 51 countries	Ten new campaigns by partners in Argentina, Belize, Burkina Faso, Czech Republic, Gaza, Pakistan, Panama, Paraguay and Vietnam brought the total to 51.
	No. of countries where we work to promote national policies, plans and/or laws on ageing	With our partners we will be active in 31 countries	With our partners, we are now active in 29 countries; however, expanding our engagements in Latin America has been lower than anticipated.
	No. of older people with the potential to benefit from new or improved policies (policy passed but not yet implemented)	We will have evidence from across our network of progress towards new policies specific to older people	We estimate that up to 9.5 million older people could benefit from new policies enacted this year. Specific laws and policies were passed in Cambodia, Colombia, Ethiopia, Ghana, Grenada, Peru, Sierra Leone, Thailand and Vietnam.
Awareness of the international ageing agenda in the UK and five OECD countries is raised through campaigns and development education	No. and reach of global campaigns	We will run public campaigns and awareness-raising activities directly with members of the public and governments in the Czech Republic, Ireland, Slovenia and the UK	We ran a successful Europe to Africa development awareness campaign – Linking Lives – with events, exhibitions and media work across Europe. A total of 1,500 Europeans signed a petition asking the President of the European Council to recognise older people in EU aid policies and guidelines.
	Outcomes of joint work to influence UK and European governments/the European Commission	We will be seeking to promote the rights and needs of older people through events and consultations on social protection, decent work and emergencies.	We influenced the inclusion of recommendations on social protection in the green paper on EU development policy in support of inclusive growth and sustainable development and in the European Report on Development 2010.

## Financial review

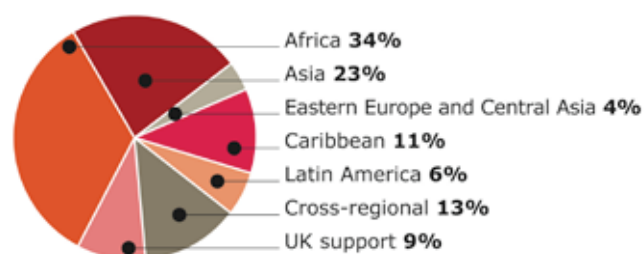
### Where our money came from



### How we spent this money



### Where we spent this money



### Highlights of our financial performance:

	Year to 31 March 2011 £m	Year to 31 March 2010 £m
<b>Income</b>		
Restricted	20.3	16.2
Unrestricted	5.6	5.3
<b>Total income</b>	<b>25.9</b>	<b>21.5</b>
<b>Expenditure</b>		
Restricted	(19.3)	(14.5)
Unrestricted	(5.2)	(5.2)
<b>Total expenditure</b>	<b>(24.5)</b>	<b>(19.7)</b>
<b>Actuarial gain/(loss) on final salary pension</b>	0.3	(0.4)
<b>Funds</b>		
Restricted	5.8	4.8
Unrestricted general	1.2	0.8
Total funds excluding pension liability	7.0	5.6
Pension reserve	(0.7)	(1.0)
<b>Total funds</b>	<b>6.3</b>	<b>4.6</b>

### Notes:

- Income in 2011 is 20% higher than in 2010
- Over 99% of income is grant income
- Over 98% of expenditure is on charitable activities
- Fundraising costs for generating voluntary income are negligible because we do not raise funds from the public but receive funds from Age UK, HelpAge Deutschland and HelpAge USA for international work
- In accordance with our reserves policy, we have a net increase in unrestricted general funds

## Structure, governance and management

### Status and governing document

HelpAge International is a charitable company limited by guarantee, incorporated on 19 October 1983 and registered as a charity on 17 November 1983.

The company was established under a Memorandum of Association, which sets out the objects and powers of the charitable company, and is governed by its Articles of Association.

### Organisational structure

HelpAge International is the secretariat of a network of Affiliates. Affiliation with HelpAge International is a formal relationship which is open to any bona fide organisation involved in issues of individual or population ageing, with the capacity of working with HelpAge International in its advocacy, research, policy, training, programmatic or other work. HelpAge International works with both Affiliates and independent partner organisations at an operational level in the implementation of a specific contract.

HelpAge International's operational and policy development centre is based in London and supports six regional development centres for Africa, East Asia Pacific, South Asia, Eastern Europe and Central Asia, Latin America and Caribbean. HelpAge International also works through country development programmes and country project offices.

HelpAge International's approach is based on a commitment to developing grassroots work which benefits older people directly, supporting and strengthening organisations which are working in practical ways to improve the lives of older people and giving a voice to older people, especially the most disadvantaged.

Most of our activities are carried out in partnership with older people's organisations, community development organisations and non-governmental organisations (NGOs). We also work closely with academic institutions on research projects and with local and national governments and international agencies to ensure that ageing issues are at the centre of development policies.

Working in partnership helps to strengthen the capacity of organisations working with older people, connect grassroots experience with government thinking and build a global alliance of organisations working to raise the voice of older people in development processes.

HelpAge International also manages programmes directly, especially in difficult circumstances such as conflict and natural disasters.

In addition, HelpAge International administers the Sponsor a Grandparent programme funded by Age UK. In 2010/2011 this programme worked through 129 partner organisations to support older people and their dependants. Additionally, our new Sponsor a Grandparent programme in India, implemented by HelpAge India, has a further 100 partners as sub-grantees.

### Trustees

The trustees are responsible for the overall management and direction of the charity. The Articles of Association allow for a maximum of fifteen trustees, up to six of whom are nominated by the Affiliates. The overall gender and geographical composition of the Board are also taken into account. As at 31 March 2011, the Board consists of fifteen trustees.

Trustees are appointed to serve for a term of four years and, at the expiration of this period, may offer themselves for reappointment for a further term of four years. At the expiration of a second term, trustees may not offer themselves for reappointment before a further period of two years has elapsed.



New trustees are nominated either by the Affiliates or identified by existing trustees or senior staff. All prospective candidates are interviewed by the Chief Executive and a recommendation placed before the Board by the Nominations Committee for consideration and vote. Once appointed, new trustees undertake a comprehensive induction programme, meeting with key staff throughout the organisation.

Trustees are actively involved in supporting and promoting HelpAge International in many different ways according to their interests, specialist skills and location.

The Board of Trustees meets twice a year and is supported by three sub-committees: Executive (two meetings per annum), Finance and Audit (three meetings per annum), and Nominations (which meets as and when required to consider the appointment of new trustees).

### **Connected charities**

Help the Aged was a founder member of HelpAge International. On 1 April 2009 Help the Aged joined with Age Concern to form Age UK. A Co-operative Agreement Covering International Activities governed the operational relationship between Help the Aged and HelpAge International and remains in place with Age UK. A Strategic Partnership Agreement between Help the Aged and HelpAge International was signed on 1 May 2008 and remains in force until April 2012. The Agreement has a rolling four-year term with a formal mid-term review. The relationship between HelpAge International and Age UK is governed by a Joint Board Committee consisting of four trustees, two from each charity and has the specific task of oversight for delivering our combined responsibility to emergency programmes funded by the Disasters Emergency Committee.

Prior to its closure to new members from 31 July 2002, UK-based employees of HelpAge International were eligible to join a joint final salary pension scheme along with staff from Help the Aged. The scheme was closed to future accrual on 30 September 2009. The employer's financial contribution towards the fund deficit is a cost to the charity and full details are included in the annual accounts.

### **Risk management**

The trustees are responsible for ensuring that the major risks facing HelpAge International are managed appropriately. They have in place a formal management process to assess risks and implement the appropriate strategies for the management of those risks. A risk register is maintained, based on a formal risk assessment review which is conducted twice a year by senior staff; it covers financial and operational risks and is reviewed at each Board meeting. The trustees are of the opinion that the charity has the appropriate systems in place to mitigate significant risks. The internal audit plan is designed to provide assurance that the systems are in place and operating as prescribed.

### **Reserves policy**

The trustees have adopted a reserves policy which they consider appropriate to ensure the continued ability of the charity to meet its objectives. The policy was reviewed in 2008, taking into account risks of loss of income and unplanned costs. The trustees agreed that unrestricted reserves (excluding the pension fund deficit) should be between £0.8 million and £1.2 million and that the policy would be reviewed in November 2011 or when expenditure reached £24 million, whichever was the earlier. At 31 March 2011 the level of unrestricted reserves, before pension provision, had increased in accordance with the reserves policy to £1.2 million (31 March 2010, £829,000). Having reached the limits set in the reserves policy, it will be reviewed at the next meeting of the Board in October 2011.

**Pension**

In accordance with FRS17, HelpAge International has obtained an actuarial valuation and recognised a pension liability of £687,000 in the accounts. The deficit does not result in any immediate liability to pay this amount to the pension scheme, as the resulting increase in contributions will be met from expected future income streams.

Future contribution rates have been calculated in accordance with the terms of the pension scheme in the light of advice from the actuary and based on the results of the last full triennial valuation of the pension scheme, carried out as at September 2006. Final results of the September 2009 triennial valuation have been received from the actuary and revised contribution rates will be implemented from 1 April 2011.

**Public benefit statement**

HelpAge has developed its aims and strategic plans to ensure that we provide public benefit and achieve the objectives set out in our governing document. These objectives meet the benefit principle defined by the Charities Act 2006.

## Statement of the responsibilities of the trustees

The trustees are responsible for preparing the report of the trustees and the financial statements in accordance with applicable law and regulations.

Company law requires the trustees to prepare financial statements for each financial year. Under that law the trustees have elected to prepare the financial statements in accordance with United Kingdom Generally Accepted Accounting Practice (United Kingdom Accounting Standards and applicable law). Under company law the trustees must not approve the financial statements unless they are satisfied that they give a true and fair view of the state of affairs of the charitable company and the incoming resources and application of resources, including the net income or expenditure of the charitable company for that period. In preparing these financial statements the trustees are required to:

- select suitable accounting policies and then apply them consistently;
- make judgements and estimates that are reasonable and prudent;
- state whether applicable UK Accounting Standards (United Kingdom Generally Accepted Accounting Practice) have been followed, subject to any material departures disclosed and explained in the financial statements;
- prepare the financial statements on the going-concern basis unless it is inappropriate to presume that the charitable company will continue in operation.

The trustees are responsible for keeping adequate accounting records that are sufficient to show and explain the charitable company's transactions and disclose with reasonable accuracy at any time the financial position of the charitable company and enable them to ensure that the financial statements comply with the Companies Act 2006. They are also responsible for safeguarding the assets of the charitable company and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

The trustees are responsible for the maintenance and integrity of the corporate and financial information included on the charitable company's website. Legislation in the United Kingdom governing the preparation and dissemination of the financial statements may differ from legislation in other jurisdictions.

Each of the trustees confirms that, to the best of his/her knowledge, there is no information relevant to the audit of which the auditors are unaware. Each of the trustees also confirms that he/she has taken all necessary steps to ensure that he/she is aware of all relevant audit information and that this information has been communicated to the auditors.

Members of the charity guarantee to contribute an amount not exceeding £5 to the assets of the charity in the event of winding up while he or she is a member or within one year after he or she ceases to be a member. The total number of such guarantees at 31 March 2011 was 16 (2010:15). The trustees are members of the charity but this entitles them only to voting rights. The trustees have no beneficial interest in the charity.

### Auditors

Sayer Vincent was re-appointed as the charitable company's auditors during the year and has expressed its willingness to continue in that capacity.

Approved by the trustees and signed on their behalf by:



**Nicholas Barr**

**Trustee**

**Date**

**12<sup>th</sup> September 2011**

## **Independent auditors' report**

We have audited the financial statements of HelpAge International for the year ended 31 March 2011 which comprise the statement of financial activities, balance sheet, cash flow statement and the related notes. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards (United Kingdom Generally Accepted Accounting Practice).

This report is made solely to the charitable company's members, as a body, in accordance with Chapter 3 of Part 16 of the Companies Act 2006. Our audit work has been undertaken so that we might state to the charitable company's members those matters we are required to state to them in an auditors' report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the charitable company and the charitable company's members, as a body, for our audit work, for this report, or for the opinions we have formed.

### **Respective responsibilities of the trustees and auditors**

As explained more fully in the statement of the responsibilities of the trustees set out in the report of the trustees, the trustees (who are also the directors of the charitable company for the purposes of company law) are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view.

Our responsibility is to audit and express an opinion on the financial statements in accordance with applicable law and International Standards on Auditing (UK and Ireland). Those standards require us to comply with the Auditing Practices Board's Ethical Standards for Auditors.

### **Scope of the audit of the financial statements**

An audit involves obtaining evidence about the amounts and disclosures in the financial statements sufficient to give reasonable assurance that the financial statements are free from material misstatement, whether caused by fraud or error. This includes an assessment of: whether the accounting policies are appropriate to the charitable company's circumstances and have been consistently applied and adequately disclosed; the reasonableness of significant accounting estimates made by the trustees; and the overall presentation of the financial statements. In addition, we read all the financial and non-financial information in the **report of the trustees** to identify material inconsistencies with the audited financial statements. If we become aware of any apparent material misstatements or inconsistencies we consider the implications for our report.

### **Opinion on the financial statements**

In our opinion the financial statements:

- give a true and fair view of the state of the charitable company's affairs as at 31 March 2011 and of its incoming resources and application of the resources, including its income and expenditure, for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice; and
- the financial statements have been prepared in accordance with the Companies Act 2006.

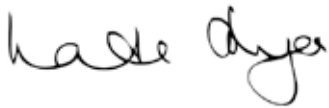
**Opinion on other matters prescribed by the Companies Act 2006**

In our opinion the information given in the report of the trustees for the financial year for which the financial statements are prepared is consistent with the financial statements.

**Matters on which we are required to report by exception**

We have nothing to report in respect of the following matters where the Companies Act 2006 requires us to report to you if, in our opinion:

- adequate accounting records have not been kept or returns adequate for our audit have not been received from branches not visited by us; or
- the financial statements are not in agreement with the accounting records and returns; or
- certain disclosures of trustees' remuneration specified by law are not made; or
- we have not received all the information and explanations we require for our audit.



**Catherine L. Sayer (Senior Statutory Auditor)**

**For and on behalf of SAYER VINCENT, Chartered accountants & statutory auditors,  
8 Angel Gate, City Road, London, EC1V 2SJ**

**Date**                      **23<sup>rd</sup> September 2011**

# Statement of financial activities

(Incorporating an income and expenditure account)

		Restricted £000	Unrestricted £000	Year ended 31 March 2011 £000	Year ended 31 March 2010 £000
	Note				
<b>Incoming resources</b>					
<b><i>Incoming resources from generated funds</i></b>					
Voluntary income:					
Fees, donations and gifts	2	27	51	<b>78</b>	18
Core grants for international programmes	2	2,846	5,186	<b>8,032</b>	6,092
Total voluntary income		2,873	5,237	<b>8,110</b>	6,110
<b><i>Incoming resources from charitable activities</i></b>					
Other grants for international programmes	3	17,444	403	<b>17,847</b>	15,383
Investment income		3	3	<b>6</b>	2
<b>Total incoming resources</b>		<b>20,320</b>	<b>5,643</b>	<b>25,963</b>	21,495
<b>Resources expended</b>					
<b><i>Costs of generating funds</i></b>					
Costs of generating voluntary income		0	41	<b>41</b>	14
<b><i>Charitable activities</i></b>					
Secure income		4,253	500	<b>4,753</b>	4,078
Health/HIV and care		3,842	498	<b>4,340</b>	4,915
Emergency and recovery		8,330	1,159	<b>9,489</b>	5,236
Age discrimination and rights		2,598	704	<b>3,302</b>	2,855
Global network		258	2,090	<b>2,348</b>	2,358
<b>Sub-total</b>		<b>19,281</b>	<b>4,992</b>	<b>24,273</b>	19,456
Transfer from fixed asset fund		(18)	0	<b>(18)</b>	46
Governance costs		0	241	<b>241</b>	223
<b>Total resources expended</b>	5	<b>19,263</b>	<b>5,233</b>	<b>24,496</b>	19,725
Net incoming resources before gains and losses		1,057	410	<b>1,467</b>	1,770
Actuarial gains/(losses) on defined benefit pension scheme	15	0	279	<b>279</b>	(350)
<b>Net movement in funds</b>		<b>1,057</b>	<b>689</b>	<b>1,746</b>	1,420
<b>Reconciliation of funds</b>					
<b>Funds at the start of the year</b>		<b>4,748</b>	<b>(162)</b>	<b>4,586</b>	3,166
<b>Total funds carried forward</b>		<b>5,805</b>	<b>527</b>	<b>6,332</b>	4,586

All of the above results are derived from the continuing activities. There were no recognised gains or losses other than stated above. Movements in funds are disclosed in Note 14 to the financial statements.



## Balance sheet

	Note	31 March 2011 £000	31 March 2010 £000
<b>Fixed assets</b>			
Tangible fixed assets	9	333	279
<b>Current assets</b>			
Debtors	10	1,514	1,208
Cash at bank and in hand		6,392	4,912
		<b>7,906</b>	6,120
<b>Current liabilities</b>			
Creditors: amounts due within one year	11	(895)	(528)
<b>Net current assets</b>		<b>7,011</b>	5,592
<b>Total assets less current liabilities</b>		<b>7,344</b>	5,871
<b>Provisions</b>	12	(325)	(293)
<b>Net assets excluding pension liability</b>		<b>7,019</b>	5,578
Defined benefit pension scheme liability	15	(687)	(992)
<b>Net assets including pension liability</b>	13	<b>6,332</b>	4,586
<b>The funds of the charity</b>	14		
Restricted funds		5,542	4,503
Restricted fixed asset funds		263	245
Unrestricted funds		1,214	830
<b>Total funds excluding pension liability</b>		<b>7,019</b>	5,578
Pension reserve		(687)	(992)
<b>Total charity funds</b>		<b>6,332</b>	4,586

Approved by the trustees on 12<sup>th</sup> September 2011 and signed on their behalf by:



**Nicholas Barr**  
**Trustee**

## Cashflow statement

	Note	Year ended 31 March 2011 £000	Year ended 31 March 2010 £000
<b>Reconciliation of net outgoing resources to net cash flow from operating activities</b>			
<b>Net incoming/(outgoing) resources</b>		<b>1,467</b>	1,770
Depreciation charge	9	<b>147</b>	166
(Increase)/decrease in debtors	10	<b>(306)</b>	499
(Decrease)/increase in creditors	11	<b>367</b>	122
Transfers to provisions	12	<b>63</b>	69
Use of provisions	12	<b>(31)</b>	(85)
Defined benefit pension scheme:			
Impact on net incoming resources before gains and losses	15	<b>20</b>	131
Employer contributions paid	15	<b>(46)</b>	(115)
Investment income		<b>0</b>	2
<b>Net cash inflow from operating activities</b>		<b>1,681</b>	2,559
<b>Net cash inflow from operating activities</b>		<b>1,681</b>	2,559
<b>Returns on investments and servicing of finance</b>			
Interest receivable		<b>0</b>	(2)
<b>Capital expenditure and financial investment</b>			
Purchase of tangible fixed assets	9	<b>(201)</b>	(129)
<b>Increase in cash in the year</b>		<b>1,480</b>	2,428
<b>Reconciliation of net cash funds</b>			
Net cash funds at the beginning of the year		<b>4,912</b>	2,484
Increase in cash in the year		<b>1,480</b>	2,428
Net cash funds at the end of the year		<b>6,392</b>	4,912

## Notes to the financial statement

### 1. Accounting policies

#### a) Accounting Convention

The financial statements have been prepared under the historical cost convention and in accordance with applicable accounting standards and the Companies Act 2006. They follow the recommendations in the Statement of Recommended Practice, and the Accounting and Reporting by Charities (issued in March 2005).

#### b) Fund accounting

Restricted funds are used for specific purposes as laid down by the donor. Expenditure which meets these criteria is charged to the fund, together with a fair allocation of management and support costs. Unrestricted funds are grants/donations and other incoming resources received or generated for charitable purposes.

#### c) Foreign exchange

Monetary assets and liabilities in foreign currencies are translated into sterling at the rates of exchange ruling at the balance sheet date. Transactions in foreign currencies are translated into sterling at the average rate of exchange in the month of the transaction. All exchange rate differences are taken to the Statement of Financial Activities (SOFA).

#### d) Income recognition

Donations are accounted for at the time of receipt. Gifts in kind are accounted for at estimated market value.

Grant income is recognised when the income is received or receivable, whichever is earlier. In applying this policy HelpAge International recognises income from grants when claims are made to donors in accordance with its individual funding agreements.

Bank interest is the amount receivable for the year.

#### e) Resources expended

Resources expended are allocated to the particular activity where the cost relates directly to that activity. Resources expended include attributable VAT which cannot be recovered. However, the cost of support, management and administration of each activity is apportioned on the basis of an estimated time allocation against each theme.

The costs of generating voluntary income relate to the expenditure incurred by the charitable company in raising funds for its activities.

Governance costs are the costs associated with the governance arrangements of the charity, including meeting all constitutional and statutory requirements.

Grants payable are accounted for in line with the payment schedule stipulated in the agreement, providing the conditions set have been met.

#### f) Fixed assets and depreciation

Depreciation is provided at rates calculated to write down the cost of each asset to its estimated residual value over its expected useful life. The depreciation rate in use was as follows:

Computer equipment	4 years
Office equipment	4 years
Overseas project assets	4 years

Assets with a cost of over £250 are capitalised.

#### g) Terminal benefit provision

Most staff employed in offices overseas on local contracts are eligible to a service-related terminal benefit for each full year of service when they leave HelpAge International. Expatriate staff are eligible for a service-related relocation allowance. These benefits are accrued during the years of service.

#### h) Pension costs

HelpAge International contributes to a multi-employer defined contribution scheme, the cost of which is charged to the SOFA as resources expended when the contributions fall due.

2. Voluntary income

	Restricted £000	Unrestricted £000	Year ended 31 March 2011 Total £000	Year ended 31 March 2010 Total £000
<b>Core grants for international programmes :</b>				
Department for International Development	0	1,870	<b>1,870</b>	1,830
Age UK	2,846	3,316	<b>6,162</b>	4,262
	2,846	5,186	<b>8,032</b>	6,092
Membership fees	0	6	<b>6</b>	7
Donations and legacies	27	45	<b>72</b>	11
Gifts in kind				
	2,873	5,237	<b>8,110</b>	6,110

**Income from the Department for International Development is a Partnership Programme Agreement grant.**

<b>Income from Age UK included special funds from the Disasters Emergency Committee:</b>	<b>£000</b>
Haiti earthquake	1,784
Pakistan flood response	909
Responses to Typhoon Ketsana (Philippines)	110
	<b>2,803</b>

3. Grants received for international programmes

	Restricted £000	Unrestricted £000	Year ended 31 March 2011 Total £000	Year ended 31 March 2010 Total £000
Big Lottery Fund	1,616	0	<b>1,616</b>	1,400
Department for International Development	668	0	<b>668</b>	849
Irish Aid	404	26	<b>430</b>	699
European Commission	1,756	102	<b>1,858</b>	2,083
Age UK	2,404	0	<b>2,404</b>	2,419
Swedish International Development Cooperation Agency	2,156	0	<b>2,156</b>	1,706
Cordaid	507	21	<b>528</b>	494
HelpAge USA	856	9	<b>865</b>	112
UN agencies	3,285	114	<b>3,399</b>	1,827
HelpAge Deutschland	345	49	<b>394</b>	429
Royal Netherlands Embassy	530	0	<b>530</b>	603
Agencia Española de Cooperación Internacional para el Desarrollo	629	0	<b>629</b>	0
WorldGranny	217	18	<b>235</b>	233
Other agencies	2,039	50	<b>2,089</b>	2,491
<b>Total</b>	17,412	389	<b>17,801</b>	15,345
Other income	32	14	<b>46</b>	38
<b>Total</b>	17,444	403	<b>17,847</b>	15,383

<b>Income from the Big Lottery Fund was received for:</b>	<b>Contract number</b>	<b>£000</b>
Older people and HIV and AIDS in Africa	IS/2/010281292	1,243
Tsunami-affected older people rebuilding their lives	ICB/1/01028919	119
Sukumaland older women's rights programme	ICB/1/01024996	141
Poverty reduction and community action	ICB/1/01030983	113
		<b>1,616</b>

Grants received for international programmes (contd.)

	Restricted £000	Unrestricted £000	Year ended 31 March 2011 Total £000	Year ended 31 March 2010 Total £000
<b>Income from Irish Aid was received for:</b>			<b>Contract number</b>	<b>£000</b>
Improving access (social protection and health)			CSFBG1190804	430
				<b>430</b>
<b>Income from Cordaid was received for:</b>			<b>Contract number</b>	<b>£000</b>
Improved income and social security			600/10313	245
Africa Platform for Social Protection			600/10307	24
Meeting health and recovery needs of older returnees, northern Sri Lanka			103972	87
Improved access to health rights and entitlements for older people			2008/30Z/JPI/C	107
Health rights and entitlements for older people in Morogoro			154/10181	65
				<b>528</b>
<b>Income from Department for International Development included funding for:</b>			<b>Contract number</b>	<b>£000</b>
Assessing and Mitigating the Seasonality of Poverty			SIF 09/10	59
Hunger Safety Net Programme: Social Protection Rights Component			CNTR 07 7958	142
Co-ordinate finalisation of social protection strategy and policy			40006000	8
Assessment Capacity Project			ARIES 201109	459
				<b>668</b>

4. Grants paid to other organisations

	Year ended 31 March 2011 £000	Year ended 31 March 2010 £000
HelpAge India	710	1,218
ACAPS Consortium (Norwegian Refugee Council)	460	183
HelpAge Kenya	409	359
HelpAge Sri Lanka	396	487
Africa Women AIDS Working Group-Tanzania	235	74
Coalition of Services of the Elderly-the Philippines	219	70
ACAPS Consortium (Merlin)	194	80
Network Activity Group-Myanmar	188	31
Gayo Pastoral Development Initiative-Ethiopia	185	0
Gravis-India	178	192
Uganda Reach the Aged Association-Uganda	170	242
Africa Platform for Social Protection-Kenya	143	0
Aged and Children Pastoralists Association-Ethiopia	125	252
Resource Integration Centre-Bangladesh	115	348
Sudanese Red Crescent Society-Sudan	94	0
China National Committee on Ageing-China	92	101
Relief Society of Tigray-Ethiopia	92	0
Muthande Society for The Aged-South Africa	91	76
Tearfund-Mozambique	88	0
Tesfa Social and Development Association-Ethiopia	84	117
Sudanese Society in Care of Older People-Sudan	73	0
Shaanxi Provincial Committee on Ageing-China	70	148
Tanzania Mission to the Poor and Disabled-Tanzania	70	99
Action for Development AFD-Ethiopia	67	142
Morogoro Retired Teachers Association-Tanzania	66	56
Centre Hospitalier de Pernier-Haiti	64	0
Fundación Horizontes-Bolivia	56	80
Associação Humanitária de Apoio á Velhice-Mozambique	50	83
Other grants individually of less than £50,000	2,183	2,347
	<b>6,967</b>	<b>6,785</b>

**5. Total resources expended**

	Staff- related costs £000	Programme costs £000	Office costs and other overheads £000	Travel and subsistence £000	Grants £000	Legal and profession al fees £000	Transfer of Fixed asset fund £000	Total £000
Cost of generating voluntary funds	39	0	0	2	0	0		41
Secure income	1,232	1,238	46	268	1,962	7		4,753
Health, HIV and care	1,069	1,029	32	156	2,024	30		4,340
Emergency and recovery	3,371	3,622	75	605	1,801	15		9,489
Age discrimination and rights	1,226	597	46	284	1,118	31		3,302
Global network	1,405	611	163	106	62	1		2,348
Governance	140	0	4	97	0	0		241
Fixed asset fund							(18)	(18)
<b>Year ended 31 March 2011</b>	<b>8,482</b>	<b>7,097</b>	<b>366</b>	<b>1,518</b>	<b>6,967</b>	<b>84</b>	<b>(18)</b>	<b>24,496</b>
Year ended 31 March 2010	7,478	3,797	370	1,185	6,785	64	46	19,725

**5a) The Assessment Capacities Project (ACAPS)**

Total resources expended on emergencies include £1,071,468 spent by the ACAPS Consortium.

**6. Net incoming resources for the period**

This is stated after charging / (crediting):

	<b>Year ended 31 March 2011 £000</b>	Year ended 31 March 2010 £000
Other finance income:		
Expected return on pension assets	<b>229</b>	196
Interest cost on pension scheme liabilities	<b>(221)</b>	(170)
Net other finance cost of pension scheme	<b>8</b>	26
Depreciation	<b>147</b>	166
Trustees indemnity insurance	<b>5</b>	5
Trustees remuneration	<b>0</b>	0
Trustees expenses	<b>44</b>	36
Auditors remuneration:		
Audit	<b>13</b>	13
Other services	<b>6</b>	6

During the period no trustee received any remuneration. Trustees' expenses are for the reimbursement of travel, accommodation and subsistence costs for attendance at all meetings held throughout the period.

The UK office is leased from Age UK at a commercial rent

**7. Staff costs and numbers**

The following information refers to staff on the UK payroll only.

	<b>Year ended 31 March 2011</b>	Year ended 31 March 2010
a) Average number of employees during the year was as follows:		
	<b>No.</b>	No.
Staff on UK payroll based in UK	<b>70</b>	60
Staff on UK payroll based overseas	<b>44</b>	40
	<b>114</b>	100
Overseas staff on local contracts	<b>408</b>	306
	<b>522</b>	406



**Staff costs and numbers (contd.)**

b) UK paid staff costs were as follows:

	£000	£000
Salaries and wages	3,289	3,050
Social security costs	210	221
Pension cost	136	137
	<b>3,635</b>	<b>3,408</b>
Overseas staff on local contracts	2,409	2,082
Other staff related costs	2,438	1,988
	<b>8,482</b>	<b>7,478</b>

Other staff-related costs include staff training, fees paid to consultants, per diems paid for attending workshops and other non-salary costs including £45,630 as an additional contribution towards the defined benefit pension scheme.

c) The number of staff whose emoluments fell within each of the following bands were;

	Year ended 31 March 2011	Year ended 31 March 2010
£60,000 to £69,999	2	2
£70,000 to £79,999	0	0
£80,000 to £89,999	1	1

Remuneration excludes employer's pension contributions of £19,202 paid into defined contribution schemes for all three higher paid members of staff.

**8. Taxation**

The charity is exempt from corporation tax, as all its income is charitable and is applied for charitable expenditure.

**9. Tangible fixed assets**

	UK assets £000	International project assets £000	Year ended 31 March 2011 Total assets £000	Year ended 31 March 2010 Total assets £000
<b>Cost</b>				
At the start of the year	311	774	1,085	956
Additions	53	148	201	129
Disposals	(185)	0	(185)	0
At the end of the year	179	922	1,101	1,085
<b>Depreciation</b>				
At the start of the year	277	529	806	640
Charge for the year	17	130	147	166
Disposals	(185)	0	(185)	0
At the end of the year	109	659	768	806
<b>Net book value</b>				
At the end of the year	70	263	333	279
At the start of the year	34	245	279	316

**10. Debtors**

	Year ended 31 March 2011 £000	Year ended 31 March 2010 £000
Other debtors	91	64
Prepayments	21	0
Accrued income	1,402	1,144
	<b>1,514</b>	<b>1,208</b>

**11. Creditors: amounts due within one year**

	Year ended 31 March 2011 £000	Year ended 31 March 2010 £000
Taxation and social security	0	62
Accruals	461	466
Other creditors	434	0
	<b>895</b>	<b>528</b>

## 12. Provisions

	Year ended 31 March 2011	Year ended 31 March 2010
	£000	£000
<b>Provision for terminal benefits</b>		
At the start of the year	293	254
Charged for the year	63	69
Utilised in year	(31)	(30)
At the end of the year	325	293
<b>Provision for international taxation costs</b>		
At the start of the year	0	55
Charged for the year	0	0
Utilised in year	0	(55)
At the end of the year	0	0

## 13. Analysis of net assets between funds

	Restricted £000	Unrestricted £000	Total funds £000
Tangible fixed assets	263	70	333
Net current assets less provision	5,542	1,144	6,686
Pension liability	0	(687)	(687)
<b>Net assets at the end of the year</b>	<b>5,805</b>	<b>527</b>	<b>6,332</b>

## 14. Funds movement

	At the start of the year £000	Incoming resources £000	Outgoing resources £000	Transfer valuation/ Actuarial gain £000	At the end of the year £000
<b>Restricted funds:</b>					
Africa	1,965	7,866	7,391		2,440
East Asia Pacific	312	2,575	2,509		378
South Asia	286	2,723	2,562		447
Caribbean	304	2,852	2,680		476
E Europe and Central Asia	146	757	781		122
Latin America	465	868	1,014		319
Other	1,025	2,679	2,344		1,360
Fixed asset fund	245	0	(18)		263
<b>Total restricted funds</b>	<b>4,748</b>	<b>20,320</b>	<b>19,263</b>		<b>5,805</b>
<b>Unrestricted funds:</b>					
General reserve	830	5,643	5,259		1,214
<b>Total unrestricted funds</b>	<b>830</b>	<b>5,643</b>	<b>5,259</b>		<b>1,214</b>
Pension reserve	(992)	0	(26)	279	(687)
<b>Total funds</b>	<b>4,586</b>	<b>25,963</b>	<b>24,496</b>	<b>279</b>	<b>6,332</b>

### Purposes of restricted funds and unrestricted funds

The charity has various funds for which it is responsible and which require separate disclosure. These are as follows:

#### Restricted funds

Income where the donor specifies the purposes within the overall aims of the organisation

#### Fixed asset fund

The fixed asset fund represents the net book value of assets held overseas purchased with restricted income. The full purchase cost is included within total resources expended as this is consistent with the basis of reporting to donors. The change in net book value is credited against expenditure in SOFA.

#### Pension fund

The pension fund represents the pension liability based on an actuarial valuation by The Pensions Trust. The transfer between funds on the balance sheet represents the actuarial gain for the year.

#### Unrestricted funds

Funds which are expendable at the discretion of the trustees in furtherance of the objectives of the charity. In addition to expenditure directly on international work, such funds may be held in order to finance working capital.

**15. The Pensions Trust-Help the Aged Final Salary Scheme****FRS 17 disclosures for accounting period ending 31 March 2011**

The Scheme is a defined benefit (final salary) funded pension scheme. The Scheme is closed to new entrants and to future accrual of benefits, but has retained the salary link for active members.

The employer expects to contribute approximately £96,500 for the year starting 1 April 2011. The current arrangements regarding contribution rates are described in a Schedule of Contributions dated 31 March 2011.

The Scheme assets do not include investments issued by HelpAge International or any property occupied by HelpAge International.

The overall expected rate of return of the Scheme assets has been based on the average expected return for each asset class, weighted by the amount of assets in each class. The Scheme has no contingent assets or liabilities.

The Scheme holds quoted securities, and these have been valued at current bid-price. The corresponding amounts from previous years have not been restated.

**Employee benefit obligations**

	Value at 31 March 2011 £000	Value at 31 March 2010 £000
Present value of funded obligations	3,915	4,067
Fair value of scheme assets	(3,228)	(3,075)
	<b>687</b>	<b>992</b>

**Impact on net incoming resources before gains and losses**

	Value at 31 March 2011 £000	Value at 31 March 2010 £000
Current service cost	12	31
Interest cost	229	196
Expected return on Scheme assets	(221)	(170)
Losses/(gains) on settlements and curtailments	0	74
<b>Total</b>	<b>20</b>	<b>131</b>

**Actuarial gains and losses**

Restated

Net actuarial gains/(losses) recognised in year	279	(350)
Net cumulative actuarial gains/(losses)	(323)	(602)

**Reconciliation of present value of scheme liabilities and assets****Change in the present value of the defined benefit obligation**

	Value at 31 March 2011 £000	Value at 31 March 2010 £000
Opening defined benefit obligation	4,067	2,967
Current service cost	12	31
Interest cost	229	196
Employee contributions	0	17
Past service benefits granted during the year	0	0
Losses/(gains) on curtailments	0	74
Actuarial losses/(gains)	(282)	921
Benefits paid (including expenses)	(111)	(139)
Closing defined benefit obligation	<b>3,915</b>	<b>4,067</b>

**Change in the fair value of Scheme assets**

	Value at 31 March 2011 £000	Value at 31 March 2010 £000
Opening fair value of Scheme assets	3,075	2,341
Expected return on Scheme assets	221	170
Actuarial gains/(losses)	(3)	571
Employer contributions	46	115
Employee contributions	0	17
Benefits paid (including expenses)	(111)	(139)
Closing fair value of Scheme assets	<b>3,228</b>	<b>3,075</b>

**15. The Pensions Trust -Help the Aged Final Salary Scheme (contd.)**

**Assumptions**

**Principal actuarial assumptions at the balance sheet date**

	<b>At 31 March 2011</b>	<b>At 31 March 2010</b>
	<b>p.a.</b>	<b>p.a.</b>
<b>Financial assumptions</b>		
Discount rate	<b>5.50%</b>	5.70%
Expected return on Scheme assets*	<b>7.25%</b>	7.27%
Rate of increase in salaries	<b>3.20%</b>	3.50%
Rate of increase in payment of pre-2005 excess over GMP	<b>2.70%</b>	3.40%
Rate of increase in payment of post-2005 pensions	<b>2.50%</b>	2.30%
Rate of revaluation of deferred pensions in excess of the GMP	<b>3.20%</b>	3.50%
Inflation assumption (RPI)	<b>3.20%</b>	3.50%
Inflation assumption (CPI)	<b>2.70%</b>	

**Demographic assumptions**

	<b>2011</b>	<b>2010</b>
Mortality	<b>SAPS Normal Health Year of Birth Medium Cohort</b>	<b>SAPS All Pensioners Year of Birth Long Cohort with a 1% Minimum Improvement</b>
Cash commutation allowance	<b>80% of maximum tax free cash taken based on factors used in the scheme funding valuation at 30 Sept 2009</b>	80% of maximum tax free cash taken based on factors used in the scheme funding valuation at 30 Sept 2009
Withdrawal allowance	<b>Allowance</b>	Allowance

Other assumptions are the same as those used in the preliminary results of the Trustees' Scheme Funding valuation as at 30 September 2009

**Assets in the Scheme as a percentage of total Scheme assets**

	<b>At 31 Mar 2011</b>	<b>At 31 Mar 2010</b>
Gilts/fixed interest gilts	<b>16%</b>	27%
Bonds/fixed interest bonds	<b>16%</b>	5%
Equities	<b>61%</b>	62%
Property	<b>7%</b>	6%
Cash	<b>0%</b>	0%
	<b>2011</b>	<b>2010</b>
	<b>£'000</b>	<b>£'000</b>
<b>Actual return on scheme assets</b>	<b>218</b>	<b>741</b>

**Gains and losses**

**History of experience gains and losses**

	<b>2011</b>	<b>2010</b>	<b>2009</b>	<b>2008</b>	<b>2007</b>	<b>2006</b>
	<b>£ 000</b>	<b>£ 000</b>	<b>£ 000</b>	<b>£ 000</b>	<b>£ 000</b>	<b>£ 000</b>
Defined benefit obligation	<b>(3,915)</b>	(4,067)	(2,967)	(3,372)	(3,39)	(2,923)
Scheme assets	<b>3,228</b>	3,075	2,341	2,965	2,921	2,608
Surplus/(deficit)	<b>(687)</b>	(992)	(626)	(407)	(470)	(315)
Experience adjustments on Scheme liabilities	<b>27</b>	115	0	(7)	(151)	13
Experience adjustments on Scheme assets	<b>(3)</b>	571	(886)	(274)	33	348

Note: This refers to the expected rated of return on assets as at the beginning of each period presented.

**16. Contingent liability**

The charity works in countries where income tax regimes have changed. The charity pays income tax in all countries where there is a clear obligation to do so. However, it is uncertain whether any liability for income tax for past services of international staff will crystallise. No provision has been made as it is uncertain whether a liability will arise. It is estimated that the value of such liability would be £200,000.

## Legal and administrative details

<b>Status</b>	The organisation is a charitable company limited by guarantee, incorporated on 19 October 1983 and registered as a charity on 17 November 1983.
<b>Governing document</b>	The Company was established under a Memorandum of Association, which sets out the objects and powers of the charitable company, and is governed by its Articles of Association.
<b>Company number</b>	1762840
<b>Charity number</b>	288180
<b>Registered office and operational address</b>	207-221 Pentonville Road, London, N1 9UZ (up to 7 July 2011) Tavis House, 1-6 Tavistock Square, London, WC1H 9NA <b>(from 7 July 2011)</b>
<b>Trustees</b>	Cho Hyunse (joined March 2011) Cynthia Cox Roman (Vice Chair from November 2010) Dalmer Hoskins (resigned November 2010) Professor Du Peng Edith Sayo Skweyiya Eric Kimani (resigned as Chair March 2011) Dr Kanwaljit Soin (resigned November 2010) Luz Barreto Mathew Cherian (joined March 2011) Michael Wade Professor Nicholas Barr Pham Hoai Giang Sanja Miloradovic Professor Silvia Gascón Tilak de Zoysa (Chair from March 2011) Vindrani Shillingford
<b>Senior staff</b>	Richard Blewitt Chief Executive Officer Silvia Stefanoni Deputy Chief Executive/Director of Programmes Alison Gordon Director of Resource Development Jane Scobie Director of Advocacy and Communication Mark Gorman Director of Strategic Development Valerie Stevens Director of Finance/Company Secretary
<b>Bankers</b>	Barclays Bank plc, 1 Pall Mall East, London, SW1Y 5AX
<b>Solicitors</b>	Cobbetts LLP, 70 Grays Inn Road, London, WC1X 8BT
<b>Auditors</b>	Sayer Vincent, Chartered accountants and registered auditors, 8 Angel Gate, City Road, London, EC1V 2SJ

## Our Affiliates

### Africa

Age-in-Action, South Africa  
APOSEMO, Mozambique  
Current Evangelism Ministries, Sierra Leone  
Elim Hlanganani Society for the Care of the Aged, South Africa  
HelpAge Ghana  
HelpAge Kenya  
HelpAge Zimbabwe  
Kenya Society for People with AIDS (Kespa)  
Maseru Women Senior Citizens Association, Lesotho  
Mauritius Family Planning Association  
Muthande Society for the Aged (MUSA), South Africa  
RECEWAPEC, Cameroon  
SAWAKA, Tanzania  
Senior Citizens' Association of Zambia  
Senior Citizens' Council, Mauritius  
Sierra Leone Society for the Welfare of the Aged  
Sudanese Society in Care of Older People (SSCOP)  
Uganda Reach the Aged Association (URAA)  
VUKOXA, Mozambique

### East Asia Pacific

Center for Ageing Support and Community Development – CASD (formerly RECAS), Vietnam  
China National Committee on Ageing (CNCA)  
Coalition of Services of the Elderly (COSE), the Philippines  
Council on the Ageing (COTA), Australia  
Fiji Council of Social Services (FCOSS)  
Foundation for Older Persons' Development (FOPDEV), Thailand  
HelpAge Korea  
Helping Hand Hong Kong  
Instituto de Acção Social, Macau  
Mongolian Association of Elderly People (MEAP)  
National Council of Senior Citizens Organisations, Malaysia (NACSCOM)  
Office of Seniors Interests, Australia  
Senior Citizens Association of Thailand  
Senior Citizens Council of Thailand (SCCT)  
Singapore Action Group of Elders (SAGE)  
Society for WINGS, Singapore  
Tsao Foundation, Singapore  
USIAMAS, Malaysia  
Vietnam Association of the Elderly (VAE)  
Yayasan Emong Lansia (YEL), Indonesia

### South Asia

Bangladesh Women's Health Coalition (BWHC)  
Gramin Vikas Vigyan Samiti (GRAVIS), India  
HelpAge India  
HelpAge Sri Lanka  
Pakistan Medico International (PMI)  
Resource Integration Centre (RIC), Bangladesh

### Caribbean

Action Ageing Jamaica  
Dominica Council on Ageing  
Extended Care through Hope and Optimism (ECHO), Grenada  
Haitian Society for the Blind  
HelpAge Barbados  
HelpAge Belize  
HelpAge St Lucia  
Old People's Welfare Association (OPWA), Montserrat  
REACH Dominica  
Society of St Vincent de Paul, Antigua

### Eastern Europe and Central Asia

Dobroe Delo (Regional Public Foundation of Assistance to Older People), Russia  
Lastavica, Serbia  
Mission Armenia  
Second Breath (Gerontological Association of Moldova)  
Slovene Philanthropy  
UMUT (Resource Centre for Elderly People), Kyrgyzstan

### Latin America

AGECO, Costa Rica  
CAPIS, Peru  
Caritas Chile  
Centro Proceso Social, Peru  
CESTRA, Colombia  
CooperAcción, Peru  
Fundación Horizontes, Bolivia  
IPEMIN, Peru  
ISALUD, Argentina  
Peru Co-ordinating Group for Older People (Mesa de Trabajo)  
Pro Vida Bolivia  
Pro Vida Colombia  
Pro Vida Perú  
Red de Programas Para el Adulto Mayor, Chile

### North America

AARP, USA  
HelpAge Canada  
HelpAge USA  
West Virginia University Center on Aging

### Western Europe

Age Action Ireland  
Age UK  
Caritas Malta HelpAge  
Centre for Policy on Ageing, UK  
Cordaid, Netherlands  
DaneAge Association  
HelpAge Deutschland  
WorldGranny, Netherlands  
Zivot 90, Czech Republic



## Our regional offices

**Africa Regional Development Centre:** PO Box 14888, Westlands, 00800 Nairobi, Kenya

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Programme offices in Africa are also in Ethiopia, Mozambique, Sudan, Tanzania, DR Congo and Uganda

**East Asia and Pacific Regional Development Centre:** 6 Soi 17, Nimmanhemin Road, Suthep, Muang, Chang Mai 50200, Thailand

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Programme offices in East Asia are also in Cambodia, Laos and Myanmar

**South Asia Regional Development Centre:** Apt. 2B, Ivy Concord, House 22, Road 108, Gulsham 2, Dhaka 1212, Bangladesh

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Programme office also in Pakistan

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Programme offices in Latin America are also in Peru and Colombia

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Programme office also in Haiti

**Eastern Europe and Central Asia Regional Programme Office:** 204 Abdrakahmanova Street, 4th Floor, 720040 Bishkek, Kyrgyzstan

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