**Executive Summary**

HelpAge International is the only international organisation addressing the challenges of poverty reduction and development in the context of rapid and unprecedented global population ageing. HelpAge is both the Secretariat of a network of 98 formal Affiliates and many more partners, and an operational NGO. In 2011-12, HelpAge worked directly with approximately 850,000 people in almost 40 countries of whom over 65% were women and contributed to over 2.5m older people gaining access to pensions and other benefits. Total expenditure stood at £27m of which 20% was unrestricted funding, the DFID PPA accounting for half of this.

HelpAge, which operates as both an NGO and a network, has received two of three tranches of PPA funding from DFID. HelpAge has used the PPA as unrestricted funds in its entirety; therefore the focus of the IPR is on how unrestricted funding has supported HelpAge in its organisational learning and development and in achieving planned results. In particular, the IPR examines the performance of HelpAge in the allocation, use and effect of its PPA grant between April 2011 and October 2012. The review incorporates an assessment of HelpAge’s PPA Annual Report (April 2011 – March 2012), and of its managerial response to feedback from DFID. More broadly, it addresses issues of relevance, effectiveness, efficiency, value for money, and impact to the extent that impact can be addressed over a period of 18 months (mid-term stage).

The IPR of DFIDs Programme Partnership Agreement (PPA) with HelpAge was conducted between June-October 2012. The IPR involved evaluation design, document review, interviews with key stakeholders within and beyond HelpAge at global and national (Tanzania and Myanmar) levels, field visits and observations. The IPR report is structured around a standard template and includes an introduction, methodology, findings, conclusions, lessons learned and recommendations. This executive summary focuses on key findings and recommendations. Findings are recorded according to the Coffey IPR Guidelines and cover Results, Relevance, Effectiveness, Efficiency and Value for Money. As the PPA funds were used as unrestricted funds the IPR team focused on the organisation as a whole.

**Results**

• The six key results at organisational level are: HelpAge builds strong partnerships with Governments; HelpAge has invested time to improve the HelpAge international network identity; HelpAge work through and supports partners – partnerships are vital to their approach; HelpAge has attained high level recognition, HelpAge engages in strong two way learning through secondments and HelpAge has made significant investments in capacity building of the network

• The PPA logframe corresponds well with HelpAge’s Theory of Change and five global action points outlined in their Strategy to 2015

• The IPR team agree with HelpAge’s self-assessment against its outcomes and outputs as laid out in the 2012 Annual Review

• The weighting of 40% impact for advocacy and campaigning work in the PPA logframe is appropriate

**Relevance**

• HelpAge is attuned to Government priorities and works with Governments

• Representativeness is high as HelpAge secures involvement of older men and women themselves, and the advocacy work they do is informed by grassroots experience

• Whilst HelpAge targets all old men and women and takes an inclusive rights- based approach, it also supports Government and donor more targeted social protection schemes

• HelpAge is operating in many (forty) countries, its focus on middle income countries and its increasing emphasis on fragile contexts are still under debate

**Effectiveness**

• HelpAge gain recognition and influence thinking on ageing amongst governments, UN, NGO and other agencies working in humanitarian, health, livelihoods, social welfare and other arenas through an effective process of building up staff expertise, learning and networks

• Learning mechanisms in HelpAge centre around working groups, workshops, exchange visits and secondments, with less emphasis on formal continuing professional development. Learning could be better informed from field experiences and learning between regions could be enhanced.

• A system of corporate indicators for M&E has been established, partially due to HelpAge being a PPA recipient. Areas for improvement in M&E include gathering of more rigorous evidence and greater skills in measuring outcomes, impacts and value for money at project and programme level.

• Partnerships are key at all levels as HelpAge work through and with partners, gaining leverage and scale. HelpAge could benefit from an overall partnership strategy, and greater clarity on ensuring capacity of partners. The IPR was not able to assess the overall relationship HelpAge has with implementing partners, this varied between the two countries visited.

• Sustainability is addressed through several routes, the two key ones being the way the organisation lobbies for Governments to mainstream concerns of older people and the secondly the way HelpAge works through, and builds the capacity of, national NGOs.

**Efficiency**

• Financial management is satisfactory. Decentralisation of financial management systems has largely been effective, and spending is on track.

• HelpAge has been and still is in the process of decentralisation, it will take time before the decentralised systems reach their full potential

• HelpAge invests in high quality staff particularly at global level, but there are still some capacity gaps, more evident at national and regional level.

**Value for Money**

• There is no organisation-wide understanding of Value for Money but this is recognised at management level. Training for staff at regional and national level is planned and value for money tools are being developed and strengthened.

• HelpAge is being strategic and innovative in the way it is leveraging wider scale appreciation of the needs and rights of older men and women, and in the way it is leveraging additional support and funds.

Lessons have been learned at policy, sector, PPA fund and organisational levels, with organisational lessons for each of DFID and HelpAge being elaborated.

The following recommendations are made by the IPR team:

• HelpAge’s initiatives to take forward the value for money agenda are good and should be pursued further

• As HelpAge responds to changing needs it should continue to ensure that its regional and national staff are orientated and trained accordingly

• HelpAge should give greater emphasis to their information management systems

• HelpAge should seek to strengthen its M&E capacity at national level

• HelpAge should strengthen existing linkages, and develop new linkages with research institutes so as jointly enhance the rigour of its evidence base.

* In anticipation of the final evaluation of the PPA, HelpAge should make sure that they will be in a position to respond to the evidence required by the PPA Evaluators.

• HelpAge should seek funds to carry out an assessment of the effectiveness and impact of their present approaches to capacity building.

• HelpAge should look at ways in which organisational learning can better inform planning, programming and innovation.

The IPR conclude that HelpAge are being strategic in their choices regarding use of PPA and other unrestricted funding. The availability of this unrestricted funding is what helps the organisation to; take a learning approach; be innovative; be flexible and; gain recognition and a voice amongst national Governments, UN bodies, donors and NGO partners alike.