

## **HELPAge INTERNATIONAL'S POSITION PAPER ON LOCALLY-LED DEVELOPMENT**

The purpose of this paper is to set the direction of HelpAge's work on Locally-Led Development. The paper outlines why Locally-Led Development matters to HelpAge International, its approach to it and the priority areas that need further work to achieve its ambition of Locally-Led Development. It has been developed by a cross-organisational task team with inputs from HelpAge Global and Country Teams as well as Network members, collected in September 2021.

### **What is Locally-Led Development?**

In the Aid sector, the term 'Localisation' has been used to denote a shift in power, decision-making, resources and leadership of humanitarian or development responses from global to local actors. Global debates on racism, colonialism, and power in the sector have brought long hidden issues to the surface and existing humanitarian and development models are being questioned for their efficiency, effectiveness, relevance, and legitimacy. The sector is not only debating these questions but also seeking ways to address them; The Grand Bargain and Charter4change commitments developed in 2016 provide guidance and aim for a systemic change in the humanitarian sector. The development sector has been working towards this through evolving initiatives, such as shifting from community participation to community-led development, or from a needs-based to a rights-based approach, recognising that sustainable development can only be achieved if communities are leading the process.

HelpAge sees Localisation as a multi-pronged process towards achieving **Locally-Led Development**.

**HelpAge's vision for Locally-Led Development is, "Humanitarian and development initiatives designed, led and delivered by national or local actors and older people within countries". This definition will evolve as HelpAge progresses in its journey towards Locally-Led Development.**

This paper articulates HelpAge's commitment to embracing and advancing Locally-Led Development. This commitment will be enacted at two different and interconnected levels within the organisation.

At organisational level, this commitment will require teams to work together and with other actors in ways that are intentionally collaborative. The role and perspective of local actors will be emphasised and valued in every action we take and in every decision we make. Advancing Locally Led Development will require radical shifts in our policies and operations.

At country level, this commitment to Locally-Led Development will, over time, result in:

- transitioning HelpAge International's offices in countries, with the intention to make space for local actors to lead and implement initiatives to advance the rights of older people.
- Shifting to partner-led programming in all places and contexts.

While our intention is clear, we recognise that Locally-Led Development will require us to constantly reflect, learn and adapt. During this journey, the role of HelpAge International will also constantly evolve, within its three core functions of Supporter, Convenor and Thought Leadership.

## I. Why Locally-Led Development matters to HelpAge?

Locally-Led Development is a genuine aspiration, rooted in our values, our history, our 2030 Strategy and the impact we aim to achieve.

- a. **Our history:** Way back in the early 1960's, staff of Help The Aged<sup>1</sup> had the vision and began to foster local and national NGO's which were financially self-supporting and independent of external control. Their vision reflected the spirit of the age, as countries around the world gained independence from colonial rule. 20 years later in the spring of 1983, a group of Help The Aged's international partners came together to form a new entity called HelpAge International. The five founding members were from India, Colombia, Kenya, Canada, and the UK.. HelpAge International was born and has been building the Global Network since then, growing from 5 to 158 members today. For nearly four decades, HelpAge has worked with partners and network members to build national expertise on ageing across the world.
- b. **Our values:** We believe that Locally-Led Development is the 'right' thing to do. HelpAge's Strategy 2030 express its commitment through its values articulated as ***Inclusion, Impact, Partnership, Learning***. Since our inception HelpAge has sought to strengthen local leadership through various initiatives such as piloting partner-led programming in Uganda, Lebanon and Tanzania and several other countries, and through Global Age Demands Action campaigns, the shift to network hubs in 2017, shift in Latin America in 2017, support to regional age networks like Southern Africa Regional Age Network and AgeNet, Older Peoples Associations in Asia and our work on Voice<sup>2</sup>.
- c. **Our 2030 Strategy:** We made a commitment, in our 2030 Strategy, to focus our efforts on change at the national level, and explicitly described our vision for Locally-Led Development:

***"As an organisation we are committed to localising and focusing our efforts on working with, through and for network members and other actors. [...] Over the next decade, we will grow and strengthen the network and our work with partners, inspiring a broader movement for change which will put population and individual ageing at the heart of development and transform the lives of older people."<sup>3</sup>***

- d. **Our Impact:** We believe that growing agency, voice, and empowerment of older persons is best achieved by locally-led initiatives, with diverse local organisations and network members in leadership roles. This provides the strongest and most durable means to ensure continued legitimacy, increase accountability to older people themselves, fulfilment of older people's human rights nationally and globally, and deliver more relevant and sustainable impact for older people. HelpAge seeks to partner with them, learn from, and support them through Supporter, Convener and Thought leader roles.

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<sup>1</sup> Help The Aged joined with Age Concern to form Age UK in 2010

<sup>2</sup> Voice is about older people's ability to claim their rights, to make choices and to participate meaningfully in decision-making in all parts of their lives, including the personal, family, social and political. It is also about older people's ability to challenge ageism and inequality. At HelpAge, voice is often used as an umbrella term to capture the areas of participation, empowerment, agency, autonomy and accountability

<sup>3</sup> Ageing in a just world, HelpAge International 2030 Strategy

## II. Our Commitments

At the core of our thinking and approach will be the following commitments:

- **To uphold older people's rights** as a priority in any change or transition we make, recognising their diversity and ensuring inclusion.
- **To shift power**, agency, influencing, and decision making to local actors, who in turn reflect the same commitment to shifting power and including the people they work with, in their decision making and prioritisation.
- **To build partnerships** whereby the strength and expertise of all local actors is valued equally by all parties, independent leadership and decision making is respected, and meaningful participation is realised for all.
- **To support a movement** of locally-led change with and for older people in a contextually appropriate, well resourced, influential, and autonomous manner at national and local levels.
- **To create an enabling environment**, through advocacy and influencing work, where local and national actors, including older people's representatives, can participate in debates and provide inputs to national and international policies. HelpAge will commit to making these contributions more visible and recognised.

## Key Principles

As we embrace Locally-Led Development, shifting completely to partner-led programming, and contributing to a locally-led movement on ageing in countries and globally, the following principles will guide our approach:

1. **AUTONOMY**: Support and encourage autonomy and decision making at the most local level possible where the effects of decisions are most clearly felt. This will be reflected in decisions on partnerships in each country, recognising that the context will strongly influence the approach taken.
2. **DO NO HARM**: We seek durable and sustainable solutions for older persons and their communities and will make sure that the decisions taken, and processes used to transition to local leadership do not negatively affect them.
3. **ADAPTIVITY**: We will be flexible and adapt our approaches based on our experience, the changing context, learning from others and the results of systematic reflection on progress, supported by a robust monitoring and evaluation system, and regular risk assessment. We will share learning from our approach to contribute to sector efforts to deliver locally-led, context specific, long term and sustainable impact.
4. **COLLABORATION**: The process towards Locally-Led Development is a collaborative effort: We will seek full participation of our teams and our partners in this process.
5. **TRANSPARENCY**: We acknowledge the challenges and different perspectives we will all see. To move forward, we will encourage robust debate to strengthen our approach.

## IV. Evolving HelpAge's role: embracing Locally-Led Development through our Core Functions

As we embrace Locally-Led Development, our core functions of Supporter, Convener and Thought leader will evolve. In all our work and through these three functions, we will continue bringing our experience and will endeavour to add value and drive the practice of local leadership; we will support local 'agents for change' – network members or other partners to achieve their goals.

**Supporter** – through technical support, capacity strengthening, equitable sharing of power and resources, and mutual learning, we will support network members and partners to build and share knowledge and expertise, lead decision making and actively participate in local, to national and global initiatives to achieve greater impact with and for older people.

**Convenor** – we will bring together and join network members, partners, and stakeholders to collaborate, learn and achieve outcomes for older people and to build a movement for change at national, regional, and global levels; this includes advocating, influencing, and campaigning for change, with and through our network and partners, to bring our collective experience to bear on policy, practice and societal attitudes towards older people and ageing.

**Thought leadership** – we collaborate with others to develop new thinking, matched with practical solutions, on issues or trends impacting on older people and population ageing. We will foster and support local thought leadership, showcasing good practice and innovation, locally and globally. HelpAge recognises the value of including diverse voices, perspectives, and experiences in our collective learning, and will ensure local knowledge and expertise as well as understanding is at the forefront of our work.

Through these functions and informed by our continuous learning and collective analysis, we will focus our efforts, resources and partnerships on championing **Dignity, Wellbeing,** and **Voice** of older people.

## Areas for Further Exploration and Development

We recognise that committing to Locally-Led Development will have profound and far-reaching impacts on our organisation. Some will be very consequential and indeed challenging. We are resolved that to truly transform, we need to work through these together in a deliberate manner.

### a. Resource mobilisation for Locally-Led Development

Many local organisations find themselves unable to access funding from international donors, often due to the eligibility criteria, compliance requirements, competition from international actors, and the systems that donors use to channel their funds. To advance our commitment to Locally-Led Development we will:

- Encourage and support national actors to build their profile and develop direct relationships with local and international donors, to apply for grants directly and diversify their own sources of funding. By working with relevant stakeholders, including donors, we will trial different approaches to grant administration, including reporting and compliance.
- We will advocate to donors for strategic funding for partners and explore partner core funding, which would provide stability and greater autonomy for partners' organisational growth and development.
- Driven by feedback from partners and network members, we will review HelpAge systems and processes for engaging with local partners to ensure that they are inclusive and accessible.
- We will develop our capacity to support partners to mobilise funding from local sources, where possible.

## **b. Our approach to partnerships: towards a more equitable relationship**

As we accelerate our shift towards local leadership and locally-led interventions, we also reaffirm our commitment to the principles of partnership described in our partnership manual: mutual respect and equality, transparency, accountability, safety, impartiality, and mutual learning.

To strengthen our partnerships, we will need to better define what these principles mean in practice for HelpAge and how they govern our selection of and relationship with partners and network members, recognising the diversity of partnerships we have already and that we seek to grow. We are also mindful of the inherent power imbalances within our partnerships. To mitigate the negative effects of this and ensure more equitable relationships between HelpAge International and partners, we will:

- Seek more and better ways to engage partners, network members and older persons in HelpAge International governance.
- Ensure that partners, network members and HelpAge work towards shared global ambition and priorities, at local and global levels; whenever possible, we will endeavour to build more strategic relations with selected partners and local actors, rather than relying on project-based partnerships.
- Seek to coordinate better with other international and local supporters and adopt a more targeted approach when providing support to local actors, to improve efficiency and effectiveness of programmes. Support the participation, visibility, and leadership of marginalised older people themselves, through their representation as and by local partners in local and national forums and spaces that are not currently accessible to local organisations, such as the humanitarian cluster system.
- Support and encourage national actors to employ mechanisms and governance structures where older people are clearly represented and included in decision making.
- Support partners to establish or participate in national and local coordination mechanisms to advance work on older people's rights, collectively and collaboratively, while acknowledging the competitive funding environment.
- Within project and grant-based partnerships, we will avoid simply transferring risk to local partners because of the transition to Locally-Led Development.

## **c. Adopting an inclusive capacity strengthening approach**

Capacity strengthening is a key feature of both our partnership approach and our approach to organisational, technical, and professional development. We will need to coordinate two key areas of capacity development:

- **Capacity of HelpAge staff** to implement the Locally-Led Development agenda and partnership approach, including appropriate mindset, behaviours, competencies, skills, processes, and tools.
- **Capacity of partners and older people associations** to drive the ageing agenda locally, through humanitarian and development programming, policy, research, advocacy, campaigning and engaging with HelpAge and other relevant networks. This will include strengthening systems as well as skills development.

We will explore and adopt learning and development models that align with Locally-Led Development:

- We will learn together with partners and local actors as equals, sharing experience and tools.
- We will embrace diversity in thought, knowledge, and experience.
- We will promote peer-to-peer learning as a more egalitarian model often offering more relevant exchange of skills.

- We will ensure that where needed, capacity strengthening of partners and staff is led by professionals with contextual knowledge and is locally sourced, wherever possible.
- We will commit to a long-term investment in strategic and coordinated capacity strengthening, independent of a funding relationship<sup>4</sup>. We will facilitate the network to play a major role in capacity development of HelpAge staff and partners.

#### **d. Progress Measurement and Accountability**

By taking a locally-led approach, we aim to increase our accountability directly to older people. This can be achieved through local partners, who are closely linked to the communities and are better placed to build effective and sustainable relationships.

To measure progress on our commitment to be more locally led we will build on our existing core MEAL principles, seeking to enhance our accountability by focussing on being participative, inclusive, creative, and responsible in how we co-develop MEAL systems and reporting related to Locally-Led Development. Our priority will be to set up monitoring and accountability systems that ensures we are supportive of local leadership and mitigate the risks and challenges for smaller local organisations or the people we work with.

Core areas to consider will be:

- Deciding on common indicators and markers of progress towards a locally-led approach that can be tracked as an indication of our success or transition. Openness and willingness to adapt and change based on feedback will be essential.
- Create space for joint reciprocal monitoring, evaluation and learning about the quality of our partnerships at regular intervals as a sign of a genuine partnership and accountability, for example exploring independently administered partner feedback mechanisms that allow the quality of our partnerships to be benchmarked against our principles for Locally-Led Development but also other partnership-based agencies.

To make progress in these areas, HelpAge will set up working groups or task teams from across the organization to develop new approaches, processes, and tools to inform the localization process and the transition in countries.

*24<sup>th</sup> Nov, 2021*

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<sup>4</sup> By investment here we may refer to financial investment, but the emphasis will be on time, human and other resources. Project funding will be limited, and prioritisation and selection criteria will be put in place for long-term support. However, our commitment to partnership exists outside of that funding relationship.