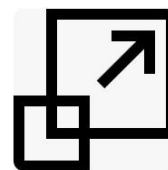


Partner-Led Programming (PLP) Strategy



1. Introduction

The HelpAge International [2030 Strategy](#), *Ageing in a Just World*, states that “to create meaningful change, we must work with older people, network members and other organisations, and forge new strategic alliances, collaborating across borders and sectors.” Working with, through and for network members and other change makers is a cornerstone of HelpAge’s strategy and ways of working. When working with others, HelpAge seeks to bring value-add as “supporter, convenor and thought leader.” (For more, go to: [Internal guide on S-C-TL](#)). These form the strategic anchors and beliefs that guide us throughout.

Within a changing sector and within a changing and ageing world, HelpAge is seeking to evolve how it brings impact. HelpAge is shifting power to national and local network members and partners and using its position as a convenor of a global network to collaborate, strengthen, support, and learn as equals. It is transforming its ways of working to have more reach and impact, and because we believe it is the right way to operate.

As part of its commitment to locally-led development (see [Position Paper](#)), HelpAge has committed to partner-led programming (PLP), as a strategic approach. It seeks to scale existing PLP approaches, while also improving the way it partners with others. This Partner-led Programming Strategy outlines the rationale, aspiration, strategy, and resources for this. Within a changing sector, HelpAge is committed to accelerating this shift to partner-led programming. Within this commitment sits the recognition that, as an INGO, we need to #ShiftThePower in deliberate and meaningful ways.

In this paper, “partners” refer to network members and other organizations (such as government departments, NGOs, Older People Associations (OPAs), Community Based Organizations (CBOs), research institutes, etc.), who HelpAge collaborates with. This may include a transfer of funds (‘grant’), or not.

The PLP Strategy will guide all HelpAge’s work and will guide teams to shift their approach ..

2. Context

Partner-led programming is a keystone for a re-imagined humanitarian and international development sector fit for the 21st century. A sector where resources and power are shared more equitably; all actors (from global to local) demonstrate accountability to local communities and people; structures and ways of working are decolonised and re-imagined; trust and collaboration powers and propels partnerships; and every actor makes a distinct contribution to the shared mission. HelpAge wants to be part of and contribute to this change.

There is no single definition of partner-led programming used across the sector. The term is often used interchangeably with 'locally-led development', 'localisation' or 'decolonisation'. For some, the overarching narrative is about shifting power to local communities, while for others it is framed in terms of developing equitable partnerships, or addressing structural inequalities. And for others still, it is about decolonising repressive ways of working in the sector. For some, this agenda is purely about increasing local involvement in projects or programmes, and for others it should be about a whole new organisation and strategy approach.¹

Although different organisations and groups use varying terminology, the strong moral imperative to change is widely shared.

Partner-led programming recognizes that local partners possess a deep understanding of the context, culture, and needs of the communities they serve. Where local partners take the lead in designing, implementing, and evaluating development programs and projects. PLP emphasizes the collaboration and active involvement of local organizations, communities, and individuals in decision-making processes, rather than INGOs solely defining the direction and strategies of the programmes.

By embracing partner-led programming, HelpAge & other INGOs aim to create more sustainable, impactful, and community-driven development interventions.

Key principles and characteristics of partner-led programming for INGOs

- Local leadership: Local partners are placed at the forefront of program design, implementation, and decision-making, enabling them to shape the interventions based on their knowledge and expertise.
- Capacity strengthening and skill sharing: INGOs and partners provide mutual support and resources to enhance the capacity of all partners.
- Mutual accountability: INGOs and partners share responsibilities and jointly evaluate the progress and impact of programs. This encourages transparency, learning, and adaptation throughout the process.

¹ For more on this, go to: [#ShiftThePower Manifesto for Change](#), [Pledge for Change](#), [Principles for Locally-led Adaptation](#), [Bond's Anti-Racism and Decolonising Framework](#), etc.

- Contextual relevance: Partner-led programming ensures that initiatives are tailored to the specific needs, priorities, and cultural contexts of the communities, as understood by local partners.
- Empowerment and participation: Partners and communities are actively engaged in decision-making, providing a platform for their voices to be heard and their perspectives to be integrated into program design and implementation.
- Resource sharing: INGOs and partners share, as equals, resources, knowledge, and expertise with local partners, facilitating collaborative efforts and leveraging the strengths of each party involved.

In doing so, HelpAge will be a more legitimate, relevant, and above all impactful organisation for older people.

In its strategic shift to embrace partner-led programming, HelpAge seeks to build on and scale current practices. In 2022, alongside direct implementation work (delivered mainly via the 13 country offices), HelpAge supported work in more than twenty countries. The organisation draws on its history, 2030 Strategy, values, and current practices.

Beyond our commitment to partnerships and the imperative for change within the sector, the acceleration of population ageing across the world creates a unique set of opportunities to expand and diversify its collaborations. In an ageing world, HelpAge's ability to partner successfully with other organisations will be an essential driver of impact for older people.

Notwithstanding these opportunities, there are also challenges to overcome. Many are known and familiar; others will emerge through practice, including failure. Much of our programme expenditure is currently delivered through direct implementation-based interventions and country offices. There is a need to adjust our approaches, tools, systems, and policies, as well as evolve our ways of working, mindset and organisational culture. Working in partnership has distinct challenges and complexities to work through, including in holding quality and compliance obligations. As we deliver this strategy, teams are encouraged to map out the challenges and develop appropriate responses based on our own and others experiences to overcome those challenges.

This is the journey ahead.

Many INGOs are already starting to make these shifts. Although every journey looks different for every organisation, HelpAge could learn a great deal from the experience of others. For some an overview of emerging practices, go to [A Compendium of best practice, toolkits and guides](#).

3. Approach and Roadmap

For HelpAge, partner-led programming is a commitment and approach for partners to lead on strategies and programmes for their countries, in collaboration with older people, and to endeavour to support them where and when they express the need. It calls for an equitable relationship between HelpAge and its partners, including in the framework of grant-funded projects.

In line with this commitment, HelpAge is phasing out “direct implementation-based” programming. The transition of country offices towards local entities is a key component of this shift.

Importantly, PLP is much broader than how we deliver the work, develop partnerships and fund partners. It relates to how we partner with others, bring distinct value-add through that collaboration, and address some of the systemic power imbalances that exist within the international development and humanitarian system². Key dimensions, including our attitudes, behaviours and mindsets, are highlighted below.



'PLP Ready' is both a destination and a journey. As Humentum articulates in the [Journey Towards Equitable Development](#) (2023), it will require shifts in how international non-governmental organizations (INGOs), national non-governmental organizations, and funders work and how they think. As a three-legged stool there is interdependence between the three stakeholders. When one leg of the stool wobbles, the entire stool shakes.

The Roadmap sets out three vehicles for HelpAge to deliver that acceleration and a destination to aim towards. They serve as internal partnership objectives where

² [Mediating the power imbalances in development \(Partnership Brokers Association\)](#)

HelpAge seeks to strengthen its partnership approach when working with others. By doing so, HelpAge will be a better partner to others, and thus bring more value as a Supporter, Convener and Thought leader.

The three vehicles are:

- Accompanying and skills sharing with partners
- Advocating and amplifying the voices of partners and older people
- Shifting more power and control of resources to partners

Within each commitment, HelpAge seeks to make deliberate steps towards being fully partner-led in its programming. This is the basis for an iterative process. (Annex 1 presents our aspirations by 2030.)

While for individual partners the relevance of each vehicle may vary, at an organisational level, the vehicles are of equal importance. Indeed, they are inter-dependent. To be successful, progress is needed in each vehicle. Similarly, partner-led programming applies equally and to all HelpAge's work: as a Supporter, Convener, and Thought leader.

Recognizing and indeed celebrating the diversity amongst partners, network members and contexts, differentiated approaches will be needed to meet the partner where they are and what they would like to do. This will be guided by a new typology of partners and partnerships, as well as a deep awareness of and respect for local contexts.

Throughout this, good relationship management is crucial. New approaches, enabling systems, supportive skills need to be developed. HelpAge's ability to relate and collaborate in different and diverse ways is critical to its success as a partner.

On this journey, HelpAge will discover new insights that will bring us new approaches over time. They will emerge over time as we test, learn, and adapt. At this point of the process, we are clear that PLP does NOT mean:

- Providing funding to deliver programmes that have been designed without partners
 - Taking a 'capacity deficit' (rather than strengths-based) approach and mindset to supporting partners
 - Providing support as driven solely by donor's agendas
 - Losing focus on older people
 - Compromising on values, quality standards, and accountability
- Speaking for older people and partners without empowering their voice and agency

3.1. Accompanying and skill sharing with partners

A first vehicle for HelpAge to deliver partner-led programming is accompaniment and skill sharing by providing responsive, tailored training and support to partners, as well as facilitating the peer connections that help to strengthen the wider movement working for the wellbeing of older people. Crucially, HelpAge would be one actor in a mutual skill sharing arrangement across the network, thereby

unlocking the full potential of the wider network. It would commit training and support as requested and directed by partners within the network and would support initiatives that enable others to do the same. HelpAge can draw on its global reach to foster peer-to-peer learning. This arrangement would enable partners to deliver their own strategies and programmes, and for the wider network, HelpAge included, to be in support of these.

Through this, HelpAge will:

- Listen to partners about the training and support they would like and what they could commit to others in terms of skill-sharing
- Commit to responsive, tailored training and having a quantifiable impact on partners' ability to achieve their outcomes
- Be trained by partners who are delivering training to others within the network
- Signpost or broker expert training from outside of the network where required
- Facilitate a platform and peer connections between CSOs that work with older people, enabling skill sharing, joint reflection, and building a sense of being a movement
- Support the skills development of other change makers (incl. Government departments) wanting to work with and integrate older people into their work

3.2. Advocating with and amplifying the voices of partners and older people

The second vehicle for HelpAge's partner-led programming is to actively amplify and enable the voices of partners and older people to advocate for social, political and policy and behavioural change.

HelpAge can do this in two ways. Firstly, by supporting partners to do their own advocacy - ensuring they receive the technical and strategic support they need to successfully deliver their own advocacy campaigns. Secondly, by convening, coordinating and committing thought leadership to wider influencing efforts towards shared goals.

Through this, HelpAge will:

- Support partners to do their own advocacy - ensuring they receive the technical and strategic support they need to deliver their own advocacy campaigns and centre the voices of older people
- Support partners to convene and coordinate with peers and build allies to work together on shared influencing goals
- Broker, organise and open doors to advocacy opportunities for partners within global decision-making spaces
- Support capacity and positioning of partners to ensure they are influential and speaking to the right people; facilitating a platform for local and national voices
- Provide holistic accompaniment of partners for the long term, rather than one-off training
- Throughout all the work, grow the voice and agency of older people

3.3. More power and control of resources to partners

The third vehicle for HelpAge to become more partner-led in its programming is moving power and control of resources to partners. Currently, much of the power and control over resources sits with HelpAge and donors and this is underpinned by traditional compliance and partnership practices which place the burden and presumption of risk on partners.

The end point of this change journey would be to significantly expand the share of long-term unrestricted or lightly restricted resources to partners, thereby blending and leveraging both restricted and unrestricted funds towards greater impact and agency for older people and their communities.

More than the other two change vehicles in the roadmap, this one represents a much more profound shift for HelpAge and will require a much bigger change in the organisation's view of its role in any future decolonised international development ecosystem.

Through this, HelpAge will:

- Assume the role of 'intermediary' where required and requested – providing valued grant management support
- Work with partners to raise funds from donors to improve the wellbeing, dignity and voice of older people
- Assume the role of a 'sub' to partners' lead in funding applications - providing specific technical services or 'commitments' that add value to the collective proposition of other actors in the network
- Actively shift a much higher proportion of its financial resources to its partners, including share an increasing share of indirect cost recoveries with its partners for its overheads and in support of organisational development
- Provide and facilitate long-term and flexible resources for partners to advance the wellbeing and rights of older people in their context
- Use a variety of participatory mechanisms throughout the funding and project cycle that ensure better and shared decision making and that put partners and older people in the lead
- Ensure that partnership decisions are informed by the views of older people and ensuring that partner-led programming enables people-led development.
- By working with others, play an active role in convening other funders to make clear commitments to funding for older people's issues and to move towards unrestricted funding to support organisations working with and led by older people

These changes will take several years and a profound shift in the business model of HelpAge, Supporting Members, donors and the wider funding ecosystem to accomplish. It will be an iterative process. To start this journey, HelpAge will make practical, achievable steps to move power and resources to partners within its current funding mix, alongside looking to develop a new, more flexible, funding mix that enables partners to have full power and control over resources.

4. Enabling conditions

To enable the above, HelpAge will need to make a set of changes in skills and culture, key business processes and partnership principles.

4.1. People, skills, ways of working and organisational culture

Skills, behaviours, and mindsets are key to growing meaningful, respectful, and deep partnership relationships and approaches.

We will grow this through the following pathways, including:

- Recruitment (drawing on Competency Framework)
- Induction
- Performance management (drawing on Competency Framework)
- Learning Strategy (under development)
- Training, including an action learning initiative
- Ongoing staff engagement and internal communication
- Etc.

4.2. Business processes, systems, tools

Key business processes will need to be re-designed to enable partner-led programming is effective, efficient, and robust.

Many current internal processes are based around the implementation and delivery of projects via a country office. As HelpAge moves becomes partner-led, the emphasis of these processes will shift from project management to grant management and oversight to ensure that partners project management and financial systems are working well.

The temptation could be to work with what is already in place and to tweak and adapt these processes to be more suited to partner-led programming. However, experience has demonstrated that in the long run this can be more time consuming and frustrating than taking a fresh view. In many instances, a full re-design of key business processes will be needed.

This starts by asking the right questions, including:

- What are we trying to do and achieve together?
- What are our shared values?
- What information do we really need and why; and how often?
- How would we use that information, and share it with others to learn?
- What are our shared metrics of success?

In doing so, the following principles will be applied:

- They are co-created with a group of partners.
- As much as possible, they seek to create shared services that are run jointly with Supporting Members

- They are not extractive and only ask for information that will be useful to the partner organisation itself, and will be used by HelpAge or the broader movement
- They use accessible, simple technology where it makes tasks easier and quicker

The following key business processes will need to be reviewed and developed:

- Partnering arrangements** - These will need to provide a framework for partners to connect with HelpAge and the wider network. They will lay out a clear commitment to partners and provide a way for them to check whether this is what they need. Equally, the partnering arrangements would enable HelpAge to check that the prospective partner is a legitimate organisation committed to aligned principles and practice.
- Listening and learning through feedback loops** - The means through which partners give feedback to HelpAge on the experience as a HelpAge partner, the impact that collaboration has had on them as organisations, and the impact that they have had with the older people they work with.
- Grant agreements and associated compliance processes** - The means through which we manage funds between HelpAge and partners. HelpAge will seek to simplify, streamline, and automate compliance. It will reflect carefully about how to manage donor and its own requirements, including addressing issues of power imbalances and coloniality in compliance management.
- Partner relationship management.** - The means through which we manage the relationship between HelpAge and its partners; in a way that is coordinated across the organisation, using up-to-date information.

The Salesforce-based CRM will be the central platform through which these processes will be curated.

4.3. Partnership Principles

Guided by the partnership value, HelpAge's practices and learnings, as well as existing frameworks from peer organizations, a set of Partnership Principles will be developed.

Informed by discussions with network members and partners, some guiding principles will include:

- **Trust:** Being willing to let go of control
- **Self-control:** Holding back from imposing HelpAge's view of what is needed
- **Proportionality:** Only asking partners for what is needed and used
- **Respect:** For partner capabilities, skills, knowledge and experiences
- **Patience:** Valuing long-term investment and commitment
- **Relational:** Getting to know partners rather than just transactions
- **Connectedness:** From local to national to regional to global; and from peer to peer
- **Empowerment:** Enabling others to use their own voice

4.4. Progress and impact indicators

To evaluate progress on the Roadmap and track the positive impacts on partnerships and older people, HelpAge will track the progress using a specific set of indicators.

Key indicators will be part of the Results Framework and will be tracked through the Digital MEAL System (DMS).

4.5. Practice and learning approach

The road ahead will bring familiar and new challenges. With it come opportunities to develop new practices and learnings. They are recognized and anticipated.

Continuously growing the partnership approaches takes time and effort. HelpAge will take a deliberate approach to and invest resources in continuous learning and periodical reflection.

This will be coordinated through the PLP and MEAL networks. The PLP Plan will outline a set of specific learning priorities. They will shape HelpAge's partnership practice and inform changes to its wider organisational design.

4.6. Governance

The Board will HelpAge's "governance structure, roles, policies and practices to determine how to maximize [its] success".

This work is led by the Governance Committee.

5. Conclusion

Partner-led programming is an approach to improve the wellbeing, dignity and voice of older people. HelpAge is committed to deliver this through support, convenor and thought leadership. As a global network, we are committed to scale up our efforts with wider stakeholders and build a movement for change to promote the rights of the older people.

In summary, what we want to achieve and see with this effort:

- HelpAge International is shifting power to national and local network members and partners and using its position as a convener of a global network to collaborate, strengthen, support, and learn as equals.
- We are transforming our ways of working because it is the right thing to do. As a responsible international development and humanitarian organisation, we want to play a leading role in shifting power in the sector, so we are more inclusive, diverse, credible, and effective. We have a history of supporting older people well, but we want to do it in a better way.
- Our programmes will be led by national and local network members and partners, and we will work with new regional, national and local partnerships.

We will share our global platform to provide support and bring together organisations to help build a movement for change that benefits from diverse perspectives, new thinking, and fresh solutions at the local, national and global levels.

- Our partners, network members and allies will have more support so they can have greater impact and freedom in their work, be part of a movement for change and have their voices heard at the table.
- This means we will do more to support partners and allies, mobilising resources, strengthening their capacity and amplifying voices so they can build and share expertise, lead decision-making, and participate in local, national, and global initiatives, influence policies and practices to bring positive change for older people.
- It means we will do more to convene partners, network members and allies, bringing experiences, knowledge, and opportunities together to change policies, practices, and attitudes for older people.
- And it means we will do more to collaborate with other thought-leaders, nurture new thinking and create space so diverse voices, new thinking and solutions are heard at the local, national, and global level.

ANNEX 1 – Three vehicles by 2030

By 2030, HelpAge and its partners are all part of an active, coordinated and supportive movement that promotes and fights for the wellbeing and rights of older people, whereby HelpAge:

<p>Builds good and trusting relationships with its partners and champions and accompanies them as they deliver their strategies. It actively listens and responds to their support needs either by providing bespoke training or by connecting them to others in the movement with the right skills and experiences.</p>	<ul style="list-style-type: none"> • Offering or facilitating the provision of training as required and in response to partners’ expressed need • Facilitating spaces for partners to reflect, plan and learn together; with partners and the network setting the agenda for those shared spaces • Working with partners to gather evidence and develop new thinking • Facilitating knowledge exchange between partners and across the network
<p>Is actively amplifying and enabling the voices of its partners and older people to advocate for social, political and policy and behavioural change. HelpAge supports partners to do their own advocacy and to convene and coordinate peers and allies to work together on shared influencing goals. When requested, HelpAge is brokering, organising and opening doors to advocacy opportunities in global decision-making spaces for partners and together the movement is making a significant difference in the lives of older people.</p>	<ul style="list-style-type: none"> • Strengthening peer-to-peer connections and relationships within the movement • Creating space for partners to advocate to decision makers, ensuring that partners receive profile and credit for their work • Amplifying the voices and expertise of partners and older people
<p>Channels more long-term flexible funding and resources to partners and leverages more restricted funds towards great impact for older people. Its funding processes are participatory and trust-based; and partners and older people themselves are seen as the experts on how and where to use resources. HelpAge plays a strong and active intermediary role for Supporting Members. Funding is secured from: progressive funders who want to sustainably support organisations</p>	<ul style="list-style-type: none"> • Mobilising long-term, restricted and flexible resources for partners that will enable them to achieve their own goals and strategies, including organisational development and learning • Supporting Members are connected with and informed about partners’ work and strategies, partner successfully to secure funding

working with older people; donor publics who are inspired by a clear articulation of the impact that partners are having; and other grantmakers who want to invest in organisations working with older people but don't hold this expertise themselves.	
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