

Terms of Reference (ToR): Development of Strategic Framework

1. Background

HelpAge International is a registered charity in the UK, leading an international network focused on ageing issues and supporting older people globally. HelpAge works with 199 partners in 95 countries to help older people claim their rights and challenge discrimination and poverty, so that they can lead dignified, secure, active and healthy lives. HelpAge operates through a Global Team with staff based across the world. Through this structure HelpAge delivers its Strategy 2030.

The Mid-Term Review (MTR) of HelpAge's 2030 Strategy identified that the current strategic planning function is inadequate for achieving long-term goals. One of the key findings was the absence of a cohesive Strategic Framework or Plan beneath the 2030 Strategy to clearly articulate and prioritise Strategic Goals. This gap has contributed to stretched teams, fragmented efforts, and inconsistent impact across the organisation.

In response, HelpAge developed a draft Strategic Framework, approved by the Board in March 2025, to bring greater coherence, focus, and accountability to our collective efforts. This draft Framework brings together several recent strands of strategic work – including the humanitarian, advocacy, and network strategies – into a single actionable plan.

The need for a cohesive framework has been further reinforced by shifts in the external environment and internal analysis, which highlight the importance of prioritising core work and allocating resources more effectively for maximum impact.

To translate the draft Strategic Framework into measurable impact and organisational change, HelpAge is now initiating a structured process to develop a Theory of Change, Strategic Roadmap, annual and medium-term Milestones, and a Dashboard for tracking delivery. These tools will be used to guide decision-making, ensure alignment across all levels, strengthen performance-based planning and track progress toward the 2030 vision. Building on this, HelpAge will design a new annual planning and reporting process to embed the framework into organisational practice.

2. Objectives

The objective is to operationalise the Strategic Framework through the development of:

- A Theory of Change (ToC) that articulates how strategic priorities and interventions lead to intended impact.
- A Strategic Roadmap outlining how the Framework will be implemented between 2025 and 2030, with clearly defined phases.
- A set of Milestones, linking annual and medium-term targets to strategic goals.
- A Dashboard for real-time tracking of progress, aligned with performance-based planning and accountability mechanisms.
- Develop an annual business planning and reporting process

3. Scope of Work

The consultant/consulting team will:

- Review existing materials including the Draft Strategic Framework, 2030 Strategy, current planning and reporting tools, and revised strategies (in progress).
- Consult with:
 - Strategy Working Group
 - Executive Leadership Group
 - Colleagues working on MEL, planning and reporting
 - Network members and supporting members
 - Consult with similar network organisations to understand the industry standard on developing impact measurement for network organisations
 - Consult with core donors
- Develop and deliver:
 - A refined Theory of Change for HelpAge as a whole
 - A Strategic Roadmap identifying key actions, timelines, dependencies, and responsibilities through 2030
 - A suite of Milestones to guide phased implementation and annual reviews
 - A Dashboard prototype in collaboration with the MEL team, that can be delivered through current organisational systems (Salesforce or DevResults)
 - Recommendations for how this framework integrates with annual planning and reporting cycles from FY26/27

4. Timeline (Early June to Mid-September 2025)

1	Inception & planning	Early-June
2	Document review & consultations	Mid-June
3	Draft ToC, Roadmap & Milestones	Late-June
4	Dashboard co-design	July
5	Validation workshops	August
6	Final deliverables & handover	Mid- September

5. Oversight

The process will be overseen by the Strategy Working Group, including two Board members and senior staff. The lead consultant will report to the Director of Global Impact, working closely with the Transformation Lead.

6. Consultant Profile

- Proven experience in strategy development, theory of change design, and performance management
- Deep understanding of INGOs, humanitarian/development sectors, and network-based models
- Deep understanding in measuring locally-led action
- Expertise on measuring advocacy priorities
- Knowledge in measuring the impact of network development, engagement and impact
- Experience designing dashboards and facilitating cross-functional strategic processes
- Strong stakeholder engagement and facilitation skills

Safeguarding

Everyone has a role in creating and sustaining a safe and respectful working environment, where no one comes to any harm or is maltreated. At HelpAge we take our responsibilities very seriously and will take action against wrongdoing. We will do everything we can to ensure that we do not engage people that pose a safeguarding risk and will undertake criminal record checks as required.

Diversity & Inclusion

HelpAge International is dedicated to creating a diverse and inclusive environment for all its employees/consultants while extending the culture of inclusion into our work.

We believe that our workforce should reflect the wide diversity of the communities we serve, and that diverse voices should be elevated and intentionally integrated into our work. We embrace difference and diversity of identity, experience, and thought, and actively strive for inclusive behaviors across our organization and work regardless of gender, race, disability, age, nationality, ethnic/national origin, sexual orientation, religious beliefs, marital status, pregnancy, social status, and political beliefs.

How to Apply

Interested and experienced consultants are invited to submit an Expression of Interest (EOI) that include:

- **A technical proposal** (maximum 3 pages) including: brief explanation about the consultant/s with emphasis on previous experience in this kind of work; profile of the consultant to be involved in undertaking the consultancy, key contacts/samples from similar work carried out.
- **A financial proposal:** The financial proposal should provide cost estimates for services rendered including professional and any other costs to carry out the assignment.

to jobs@helppage.org by the closing date with the email subject:

Consultancy: Strategic Framework development