



# Annual report and financial statements

2019/20

**HelpAge**

**International**

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Our vision is a world in which all older people can lead dignified, healthy and secure lives.

Our mission is to promote the wellbeing and inclusion of older women and men and reduce poverty and discrimination in later life.

Our values:

We strive for  
significant and lasting  
**impact**

We are  
**inclusive**

We work  
as committed  
**partners**

We are  
passionate about  
**learning**



Ben Small/HelpAge International

As part of a digital storytelling project that puts older people at the centre of the narrative, a group gather in Mbeya, Tanzania, to talk about how a HelpAge project has supported them.

## Welcome

**HelpAge International represents a diverse global network of more than 150 organisations across 85 countries, supporting millions of older people to live safe, dignified and healthy lives.**

Our global partnership works to ensure the inclusion of older people across society and strives to deliver a just and fair world for everyone, whatever their age. Our work is driven by our desire to deliver real impact for older people, to be inclusive, to work in partnership and to learn from our shared experience.

This annual report describes some of our work this year to create a world where every older woman and man has an income; enjoys the best possible health, care and quality of life; is safe and secure, and free from all forms of discrimination, violence and abuse; and knows that their voice is heard. It also marks the end of our five-year strategy to 2020 and reflects on how we improved the lives of older people during that period.

By 2030 the world will have more older people than ever before and, for the first time in history, they will outnumber children under the age of 10. This is something to celebrate but it also underlines the importance of the work we do as champions of the rights of older people. Against this backdrop,

the report looks ahead to our new 10-year strategic plan – Strategy 2030 – which will guide our work over the next decade.

Strategy 2030 gets underway at a time when the world is irrevocably changing as a result of COVID-19 – the impact of which has been felt in every country and by every community. But it is older people who have borne the brunt as the virus threatens their health, robs them of their livelihoods, isolates them, exposes them to abuse and, in some countries, undermines their basic human rights.

COVID-19 has shone a light on the importance of the work being done by HelpAge, the global network and our partners. It has exposed the cracks in the system: the lack of protection and provisions for older people. It has also raised awareness of the vital role played by older people in families, communities, and in wider society.

Older people are our family, our neighbours, our caregivers and our friends. They are the mentors who created the world we enjoy today. They should be allowed to age with dignity, enjoying the same human rights as everyone else. This annual report provides a snapshot of how this year HelpAge worked towards that vision.

**Today** about **1 billion** people are over 60 years of age (UNDESA WPP 2019)

1bn 

→ **By 2030** this will rise to **1.4 billion**. Older people will outnumber children aged 0–9, and there will be **200 million** over 80 years of age

→ **By 2050** there will be **2 billion** older people, making up more than one fifth of the global population





YAKKUM Emergency Unit/HelpAge International

HelpAge network member in Indonesia, YAKKUM Emergency Unit (YEU), distributed much needed food to older people in response to the outbreak of COVID-19.

## The year in review: a message from our Chair and CEO

**As this annual report went to press, the world was undergoing radical change brought on by the impact of COVID-19 – a global pandemic that would threaten the health and wellbeing of millions of older people.**

COVID-19 has served to reinforce the significance of HelpAge's mission as older people have been exposed to huge risks to their income, health, security and voice. We have been proud to be able to join with the global network and other partners to promote their wellbeing and inclusion at this time, standing against age-related injustice and discrimination.

Against the backdrop of the pandemic, this annual report looks back on what we achieved in the final phase of our five-year strategic plan 2015–2020. It reflects on a year when 17 new organisations joined the global network and we secured advocacy and lobbying wins that will improve the lives of older people.

One strong example was our help to bring about a societal step change through our work on social protection in Uganda. In 2019 the government agreed to pay all older people over the age of 80 a pension, giving them guaranteed financial support in their old age. This was a real moment for celebration and was the result of years of work by HelpAge in Uganda – identified as a target country where it was felt change was achievable by working with the government.

Our work to promote and protect older people's right to health also received a major boost when a global commitment to deliver universal health coverage was made at a High-Level Meeting on health at the 2019 UN General Assembly in New York. Heads of State, ministers, health leaders, policy makers and universal health coverage champions came together to make a public commitment to deliver universal health coverage by 2030, reaching what UN Secretary-General António Guterres described as "the most comprehensive agreement ever reached on global health".

The commitment included a specific pledge to "scale up efforts to promote healthy and active ageing, maintain and improve quality of life of older persons and to respond to the needs of the rapidly ageing population". This has the potential to make a significant difference in the lives of older people and is the result of years of advocacy by HelpAge and global network members on the right of older people to health.

This year our humanitarian approach helped us deliver age-appropriate assistance for older people caught in crises. When Cyclone Idai hit south-eastern Africa in March, we instigated an immediate response with network members and partners in Malawi, Mozambique and Zimbabwe. We carried out rapid assessments of older people's needs in each country to ensure they would be factored into the wider humanitarian response. We provided funding to network members, delivered targeted technical support, advocated for older people affected by the cyclone, and instigated programmes to promote the psychosocial recovery of older men and women.

In all the above, the voice of older people and the network were central to our work. Working as a partnership, we consulted older people on their needs and priorities and ensured their voice could be heard at every level. A highlight of the year was watching Margaret Kabango from Kampala speaking at the UN High Level Meeting on Health, powerfully representing the health needs of older people all over the world.

We are committed to building on this way of working through Strategy 2030. We talked to hundreds of individuals around the world in the course of 2019, including older people, staff, partners, network members, policymakers and women's and disability groups, to inform the strategy. These consultations gave us a sense of how many older women and men struggle to survive and the barriers they face to ageing well.

We know that we cannot deliver the change they deserve without the support of a network of organisations working together to deliver a fairer world. We are committed to acting as a supporter, convener and thought leader for this global network and others with the goal of being able to make it possible for every older woman and man to say "My voice is heard", "I enjoy wellbeing" and "I am treated with dignity".

If this is to happen as the world "builds back better" from COVID-19, we must work together to create more inclusive, thriving communities where everyone is valued and treated with respect, regardless of their age. This can only be done if older people are heard and engaged with as active members of society.

COVID-19 has exposed the huge cracks in the system and the inequalities that older people face, but this makes us more determined than ever to address them. We will have to evolve and change as an organisation to deliver on our Strategy 2030 but the impact of this crisis serves to reaffirm that what we aim to achieve is more important now than ever.



*Arun Maira*  
Arun Maira  
Chair of Trustees



*Justin Derbyshire*  
Justin Derbyshire  
Chief Executive Officer

# Our work at a glance

The world we want is one where every older woman and man, everywhere, can say:

## **“I have the income I need”**

HelpAge will work to secure the right of older people to the income they need through sustainable and resilient livelihoods, decent and appropriate work, with security of assets, and adequate social protection to ensure a dignified old age.



## **“I am safe and secure, free from all forms of discrimination, violence, abuse and neglect”**

HelpAge will work to achieve the right to safety and security, and freedom from all forms of discrimination, violence and abuse, for older women and men.



## **“I enjoy the best possible health, care and quality of life”**

HelpAge will draw on a broad range of expertise to ensure the right of older women and men to the best attainable health, nutrition and care services, enabling them to enjoy the best possible health and care, supporting wellbeing right through to the end of life.



## **“My voice is heard”**

Our intergenerational movement will campaign for the voices of older women and men to be heard by decision makers. We will ensure that their experience is recognised and supported, working together as agents of change.





# “I have the income I need”

Millions of older people around the world have no social pension or reliable income. This inequity drives our work with governments, network members, partners and older people to promote older people's rights to a secure income and social protection. In 2019 this resulted in more than 1.28 million older people in six countries receiving a pension for the first time, helped 139,000 older people improve their livelihoods, and supported 38,000 older people affected by humanitarian crises to meet their daily needs.

## Ensuring more people access better social pensions

In Uganda, HelpAge and its partners successfully secured a commitment from the Ugandan government to make the country's social pension universal for everyone over the age of 80 years. This means that by June 2020 a monthly cash payment of US\$7 will be received by 136,691 people in districts where the pension was not previously paid.

In Kenya, the Inua Jamii social pension was disbursed to almost 55,000 more people than last year – meaning it now reaches almost 765,000 older people in total. HelpAge also worked with the Kenyan government to guarantee the pension enrolment of older people in low-income, vulnerable situations in Nairobi's informal settlements.

In Myanmar, training for government staff on improving delivery of the country's social pension – including technical support to improve social welfare databases – helped generate a greater-than-expected 11,500 increase in the number of pension recipients, pushing the total figure to over 200,000.



**An older woman in Myanmar collects her social pension from a local agent after being notified of its arrival by SMS.**

HelpAge International

**In the past year:**



**1.28 million** older people in six countries received a social pension for the first time.

**£4.88 billion+** was paid to older people in the 18 countries where HelpAge has actively worked on social pensions over the past five years, representing a year-on-year increase of £202 million.

**38,000** older people (63 per cent women) across nine countries had their financial and food security protected and supported through our humanitarian and disaster risk reduction programmes.

HelpAge also continued to work with federations of Older People's Associations (OPAs), partners and network members in Bangladesh to provide advocacy and campaign advice on the country's Old Age Allowance. This work saw the number of pension recipients increase by around 400,000 to 4.4 million, and a roll-out of the use of electronic payments (introduced with HelpAge's support in four districts in 2018) to an additional 16 districts.

In Ethiopia, technical advice, advocacy and research on older people's inclusion in social protection provided by HelpAge led the Ethiopian government to enrol almost 30,000 more older people in its Urban and Rural Productive Safety Net Programme – a 10 per cent rise on last year – while our work to promote electronic pension payments resulted in the government piloting it as a method of transfer. And in Pakistan, HelpAge supported the Khyber Pakhtunkhwa provincial government in setting up a management information system to maintain and update data on older people so that they could more effectively be included in social protection and social services.

HelpAge also saw success in our work to advocate for higher benefit levels. In Mozambique, older citizen monitoring (OCM) groups pushed the government to increase cash transfers to older people and people with disabilities by 84 per cent. While in Moldova, HelpAge's Age Demands Action (ADA) campaign won a government concession to ensure that pensions keep pace with the cost of living through twice-yearly indexing.

## Case study

### Elderly Affairs Act passed in Zanzibar

In February 2020 the Elderly Affairs Act became law in Zanzibar. HelpAge had worked with the government to develop and pass the Act, which enshrines the pension as a legal right alongside a number of other rights, including the right to legal representation, social services, dignity, health, protection, privacy and property. Technical support from HelpAge and the efforts of network members were at the heart of this success, through consistent engagement with members from the House of Representatives, other government officials, and the United Nations.

*“This is huge news to us older people here in the isles. This means that among many other things, we are entitled to pension. It is now our right. We are very grateful for many things that our president has done for the older people here in Zanzibar.”*

**Ghanima Othman, an older person and member of Zanzibar Association for Retirees and Elders**

**Below: Mambo Huwiss Mambo is a fisherman who used the universal state pension in Zanzibar to buy new nets to improve his business.**



Kate Holt/Age International



## Strengthening social protection through laws and policies

This year HelpAge helped to draft a piece of pan-African legislation – The African Union Protocol to the African Charter on Human and Peoples' Rights on the Rights of Citizens to Social Protection and Social Security. This will set the stage for pensions and other benefits being made available for African citizens across the life-course and help Member States progressively realise the right of every citizen to social security.

HelpAge's work in Malawi saw a bill to establish a universal social pension tabled in parliament, while in Ethiopia we helped to establish a department focusing on older people within the Ministry of Labour and Social Affairs. And in Myanmar, HelpAge led the development of a national social assistance law that will enshrine social protection for older people, children and people with disabilities as a legal right.

## Generating evidence for social pensions

This year we made sure that we learned from our recent successes in establishing social pensions in Malawi, Myanmar and Zanzibar by conducting detailed and extensive surveys of social pensions and cash transfers to older people. These studies strengthened our understanding of older people's livelihoods and the prevalence of disability among older people in a number of low- and middle-income countries, and provided a critical snapshot of needs for future work on social pensions.

We also laid the foundation for a rigorous evaluation of Kenya's universal social pension in 2020/21 by working with UN agencies and the Kenyan government to implement a baseline survey. This policy is expected to extend the pension to about 1.5 million people aged 60–69 years and provide free health insurance for older people and people with disabilities. HelpAge also worked with network members and partners – in particular the International Labour Organization (ILO) in Lebanon and Zimbabwe – to develop feasibility studies for social pensions in Jordan, Lebanon and Zimbabwe.

## Supporting older people's livelihoods

In Uganda, we helped more than 200 older refugees take part in activities that enabled them to boost their income and afford medicines and household items, as well as school materials for vulnerable children in their care.

An initiative to support grandparents' in Ethiopia and Kenya helped us improve the income and standard of living of about 135 older people living in poor urban communities in Addis Ababa, Dire Dawa, and rural areas of Turkana.

In Kenya, our local Sponsor a Grandparent (SAG) partner Echami Aito integrated SAG programme activities with government cash transfers and health



**Lokichar Lopary, 70, from Nakwamekwi in Turkana Central started a small business selling vegetables with funds from the Sponsor a Grandparent project.**

Daniel Erot, Echamiato/Age International

insurance, benefitting children and orphans cared for by their grandparents – as well as other family members – in the hardest hit villages of Loima and Turkana Central.

In Bangladesh, HelpAge supported federations of OPAs and Community Disaster Management Committees (CDMCs) – important forums for ensuring older people benefit from the services to which they are entitled. OPA and CDMC leaders prepared lists of eligible older people most in need of government services, which led to almost 6,000 older people taking part in community-based livelihood activities and improving their food security. Newly formed Intergenerational Self-Help Clubs (ISHCs, a type of OPA) enabled older members to take out loans and take part in training on income-generating activities. And under our Rohingya response project in Bangladesh, more than 2,000 older Rohingya refugees received skills training and loans, helping them start businesses making fishing nets, handicrafts, rearing poultry, and establishing small shops.

Psychosocial support activities had a positive impact on older people in Lebanon. They enabled them to feel productive and part of their communities, and also helped them generate an income through learning new or developing existing skills such as gardening, sewing, crocheting, and cooking.

Likewise in Moldova, HelpAge's work to support livelihoods and distribute food packages to older people enabled almost 700 older people (70 per cent of whom were women) develop poultry and animal-rearing businesses, greenhouse vegetable growing, and handicrafts such as carpet weaving and embroidery.

# “I enjoy the best possible health, care and quality of life”

Older women and men around the world often struggle to access the health and care services they need. Our work to redress this injustice meant that this year we ensured almost a quarter of a million older women and men received better healthcare, and that more than 15 million benefited from new or revised government health and care policies.

## Influencing policy on ageing and health

*AgeWatch Insights* reports were produced on the right to health for older people in Tanzania and Vietnam. Ministry of health representatives and other key stakeholders attended the launch events, which were used to advocate for older people's inclusion in universal health coverage (UHC) in the run up to the UN High Level Meeting (HLM) on UHC in September 2019.

In preparation for this meeting, HelpAge worked with network members and partners around the globe to call for UHC fit for an ageing world. Our joint influencing actions helped ensure that older people's health and care needs were included in the political declaration, adopted by Member States in New York at the HLM. The declaration highlights the importance of responding to the needs of a rapidly ageing population and emphasises the need to scale up efforts to promote health and active ageing, and maintain and improve the quality of life of older people.



Primary care nurse Naume Ngirazi – who received training funded by HelpAge on how to better treat older people – stands outside the rural health centre in Gudo, Zimbabwe where she has worked for 10 years.

Alice Foggett/HelpAge International

## In the past year:



**225,784** older people in 17 countries received better health and care services or support as a result of HelpAge's work – the majority of whom were older women (62 per cent).

**3.1 million** older people benefitted from new or revised government health and care policies.

**51,500** older people (63 per cent women) in 11 countries had their health, care and nutrition requirements provided for and protected during humanitarian crises, through emergency responses and disaster risk reduction.

We continued to work closely with the World Health Organization (WHO) and supported preparations for the Decade of Healthy Ageing. We facilitated cross-network input into the Decade consultation process and informed plans that meaningfully included older people's voices. This was mainly achieved through 16 country case studies that described examples of engaging older people in the design, delivery and monitoring of community services in diverse contexts across WHO regions. Leah Nzuamtemi Nzali, Chair of the HelpAge-supported Morogoro Older Citizens' Forum in Tanzania, was invited to speak at an event focused on the Decade at the 72nd World Health Assembly in Geneva, and shared her experiences of ageing, health and care, and access to services.

## Providing health education and home care

This year our Better Health project, funded by Age International in Kenya and Mozambique, continued to provide health education and services to older people through community health workers and home-based carers. In Kenya, the project supported the formation of OPAs and trained 318 members on older people's rights, advocacy and healthy ageing. In Mozambique, the project trained more than 30 home-based carers in care provision, and 10 health clubs were created to support older people's active and healthy ageing.



Vitaliy Kononov/HelpAge International

### Older people exercise on World Diabetes Day in Kyrgyzstan.

In Tanzania, our health work focused on addressing non-communicable diseases (NCDs), sexual and reproductive health rights, and home-based care. Outcomes were tracked using the HelpAge Health Outcomes Tool, a tool developed by HelpAge to identify and fill gaps in health and care monitoring for older people which is now used in nine countries. The tracking process revealed a rise in the functional ability of those engaged in the programme (from two per cent in October 2018 to 48 per cent in March 2020), and a strengthening of independence and the ability to self-care (which rose from nine to 72 per cent over the same period).

Almost 80,000 older people, including older people with disabilities, benefited from our health and wellbeing interventions across Ethiopia this year. Healthy Aging Clubs provided peer support and health education to promote healthier lifestyles among older people, and in Addis Ababa, HelpAge delivered palliative care services to chronically and terminally ill older people through our partner, Hospice Ethiopia.

HelpAge partnered with WHO in Pakistan to implement an age-friendly primary healthcare project for Afghan refugees, providing better access to eye care, primary healthcare, mental health and psychosocial support, and assistive devices to almost 8,500 older people. And a three-month community health programme for older people run by HelpAge in Jordan helped to educate older people on managing long-term conditions such as diabetes, improving their diet and pursuing healthier lifestyles, for example through exercise.

Meanwhile, in Kyrgyzstan, mass media campaigns on managing diabetes conducted in partnership with the World Diabetes Foundation reached around 140,000 people, while 810 patients diagnosed with diabetes-related foot problems were referred for specialist treatment. And in Moldova, funding from

World Jewish Relief enabled network member, the Serbian Red Cross, to support active ageing activities, reaching a total of 1,140 older people, 75 per cent of whom were women.

### Strengthening health and care systems

In Kenya and Mozambique, the Better Health programme helped address gaps in the health system by training staff, supporting improvements in health care facilities, and advocating for health policies that ensure health services are free for older people.

Older citizen monitoring and accountability groups in Ethiopia successfully pressed for more age-friendly services, while the capacity of 14 partner health facilities was strengthened through the training of 275 health staff on NCDs, eye-care, and the provision of equipment and medicines. Around 30,000 older people with disabilities are now set to receive treatment through these enhanced facilities.

And in Myanmar, HelpAge continued to strengthen the capacity of the national health system by training staff in all 330 townships and 15 state health departments to respond to NCDs. New evidence on NCDs was generated and used to inform policy recommendations. To date, HelpAge's interventions have increased the knowledge of 1,300 policy makers and public health experts on the needs of older people.

### Influencing policy and services

HelpAge policy engagement around the world supported approximately 3.1 million older people to receive treatment and other support from government health systems this year.

In Asia, in collaboration with the Asian Development Bank, HelpAge provided technical assistance to develop strategic plans on long-term care in Indonesia, Mongolia, Tonga and Vietnam. In Bangladesh, HelpAge supported the government to develop the National Geriatric Nutrition Policy which aims to reduce NCDs.





Karel Prinsloo/Age International

**Older people's lives were devastated when Cyclone Idai swept across Malawi, Mozambique and Zimbabwe in March 2019.**

HelpAge and network members across Africa continued to engage with government to push for, or support, the roll out of UHC programmes. In Ethiopia, Kenya, Malawi, Tanzania, Uganda and Zimbabwe we advocated for and participated in the development of policies and strategies upon which UHC is founded. We engaged in the 25th anniversary summit of the International Conference on Population and Development in Nairobi, supporting the participation of network members and older people and successfully influencing the summit agenda to include a session focused on ageing.

In Latin America and the Caribbean, the HelpAge secretariat worked with Colombian partner Fundación Saldarriaga Concha to develop a free online course on older people and mental health, in which more than 3,000 people from across the region participated. HelpAge also joined the Coalition Against Diabetes in a national platform in Colombia to push for older people's inclusion in diabetes services.

In Kyrgyzstan, the National Plan to Improve the Quality of Life of Older People was approved in August, following four years of advocacy and technical support from HelpAge and members of the Central Asian regional network, AgeNet.

## Supporting health in crises

Throughout the year we continued to support the health needs of older people in humanitarian contexts. We used our Rapid Needs Assessments for Older People to engage WHO on older people at risk in humanitarian crises, and presented key findings from our rapid needs assessment on Syria at the WHO Global Research, Innovation, and Education in Assistive Technology Summit in Geneva in 2019.

This engagement increased WHO's interest in the needs of older women and men for assistive products in humanitarian settings, an area not previously considered in its work.

In Mozambique, HelpAge used information gathered from a rapid needs assessment to tailor a response to the health needs of older people affected by Cyclone Idai, and the subsequent cholera outbreak. The findings were shared with others involved in the humanitarian response to ensure that the specific needs of older people were addressed.

Our cyclone response also included developing psychosocial guidelines and toolkits. These were supported by training sessions for network members and partner staff in Malawi, Mozambique and Zimbabwe to enable outreach teams to deliver psychosocial support to older people affected by the disaster.

In Bangladesh, 83,000 older Rohingya refugees received health services in Age Friendly Spaces set up by HelpAge and local partners in the Cox's Bazar refugee camps. More than 20,000 older refugees benefitted from health, rehabilitation and psychological counselling services tailored to older people in these spaces.

And in Ukraine, housebound older people affected by the conflict were provided with home-based care, including support with daily tasks like washing and dressing in order to improve psychosocial wellbeing and support independence. The project provided assistive devices, hygiene kits and sanitary products, while outreach and referral support helped older people most at risk access broader humanitarian assistance, including food.

## Case study

### Age-Friendly Space helps Mabilia on the path to security

Sixty-year-old Mabilia Khatun is a Rohingya refugee from Myanmar, now living in Bangladesh. She witnessed horrifying events as she fled her home at the hands of the army, walking for three days non-stop to reach the safety of Cox's Bazaar in Bangladesh.

Bruised and traumatised, Mabilia found her way to the Age-Friendly Space in the refugee camp, and so began her long journey to better physical and mental health. Through the Age-Friendly Space, HelpAge provided her with medical support, psychosocial counselling, and eventually a small grant to help her set up a small shop in the camp.

HelpAge continues to build Mabilia's confidence and the business management skills she had already. She is now able to save money and provide nutritious food for her family, and is also a member of the camp's water and sanitation for hygiene committee. The combination of home visits, skills training, a small grant and counselling has put Mabilia on the path out of extreme trauma and insecurity.

*"Now I get well and can earn money with which I can help my family."*

**Mabilia Khatun, Rohingya refugee**

**Below: An older Rohingya man with a disability is carried to see a doctor in the age-friendly space in the camp.**



Reza Rahman/Amnesty International



# “I am safe and secure, free from all forms of discrimination, violence and abuse”

Elder abuse – the discrimination, abuse and neglect of older women and men, and the violence often perpetrated against them – is a growing concern, and according to WHO it is faced by one in six older people around the world. Eliminating this abuse is at the heart of our protection and advocacy work in both humanitarian and development settings.

## Tackling violence and abuse

In Tanzania, the National Strategy to Eradicate Elder Killing, launched last year in Tanzania as a result of HelpAge and partners’ sustained advocacy and support, has continued to lead to further reductions in witchcraft-related killings countrywide which fell from 56 older people in 2018 to 32 in 2019. The overall goal of the strategy is to eliminate the killing of older people by 2022.

In Kyrgyzstan, our community-led intergenerational approach to prevent and respond to gender-based violence saw older and younger activists challenge harmful social norms, attitudes and behaviours. Working in partnership with school administrations and local authorities, the activists led community activities and campaigns to raise awareness of violence against women and girls. This resulted in measures to prevent violence against older people, and their abuse and neglect, being included in the 2019–2025 Plan to Improve the Quality of Life of Senior Citizens in the Kyrgyz Republic, adopted by the Kyrgyz government in 2019.



Mubarak-apa, 70, is the leader of an intergenerational group in Kyrgyzstan, fighting gender-based violence in their village.

## In the past year:



**183,000** older people – 60 per cent women – received humanitarian aid in 30 countries.

**45,404** people across nine countries took part in disaster preparedness work or training.

**5** national policies were introduced in Kenya, Kyrgyzstan and Tanzania to protect older people from violence and abuse.

**156** partners in 15 countries enabled almost 431,500 older people to access information about laws and support services relating to violence and abuse.

A comprehensive package (including an e-training manual which will be launched in 2020/21) to raise awareness of, and combat, the perpetration of violence, abuse and neglect against older people was developed in Moldova by HelpAge for national government agencies, the media and five universities. More than 1,000 older survivors (or those at risk) of violence, abuse and neglect – 90 per cent of whom are women – were reached by trained volunteers in 14 communities. Older women and men learned more about the many ways that such injustice is perpetrated and the legal assistance available to confront it, and most importantly found a space to speak about their experiences and seek support. One of the volunteers said: “The project made the population in the village more conscious of violence and abuse, while older women who were initially reluctant to speak about it now recognised it and requested assistance.”

In Uganda, HelpAge and partners worked with radio, TV and social media to encourage the reporting of cases of neglect, abuse, and violence against older people, and worked with local legal service providers to ensure that their services were inclusive of older people’s needs. As a result, more older people sought legal advice, referrals and legal redress from trained community paralegals, especially in relation to land and property disputes, which are frequent concerns for older people.





Ben Small/HelpAge International

**When Dafursi was accused of witchcraft in a refugee camp in Tanzania, HelpAge held a meeting with her community to challenge the rumours. She has now been accepted by those around her.**

In Bangladesh, HelpAge continued to work closely with 18 service providers, including government and non-governmental organisations, to deliver a protection programme for Rohingya refugees addressing neglect, abuse and violence against older people in refugee camps. Through this trusted platform, we supported more than 1,000 older survivors to feel safe and disclose their situations.

## Reaching older people in crises

This year HelpAge reached over 430,000 older people with information about the legal rights and services available to them and saw five national policies to protect older peoples' rights introduced in three countries. This enabled a potential 3 million older people to enjoy their right to live free from discrimination, violence and abuse.

During 2019 more than 166 million people needed humanitarian assistance across the globe, fuelled by protracted conflict, infectious disease and extreme climate events. In response, we supported more than 183,000 older people through humanitarian and disaster preparedness responses.

Rapid needs assessments of older people in Colombia, Ethiopia, Jordan, Malawi, Mozambique, Pakistan, Syria, Tanzania, Venezuela and Yemen were carried out during the year, helping us better understand the lives and immediate needs of older women and men caught up in humanitarian crises.

In Venezuela, we worked with network member Convite to survey 900 older people to assess their needs in light of the financial crisis affecting the country. We followed this up with another needs assessment of more than 500 older people on the Colombian border with Venezuela where migrants were living in extremely harsh conditions. We used the data from this survey to work with network member, Pastoral Social, and the UN High Commissioner for Refugees (UNHCR) to develop better-targeted interventions and influence the work of other humanitarian actors in these crises.

## Preparing for emergencies

We rolled out an inclusive Disaster Risk Management Strategy in the Asia Pacific region to help ensure that older women and men, and those with disabilities, are included in disaster risk reduction and preparedness plans. As part of this we produced a training guide and toolkits, including games and materials to support disaster risk reduction work and to build older people's resilience and capacity to cope with the impact of crises.

In Ethiopia, we worked with older people displaced by drought and conflict in Borona camp for internally displaced people, and with older South Sudanese refugees in Gambella refugee camp. We used the disaster risk reduction programme to ensure that older people with knowledge of traditional early warning signs were recognised as experts and that their knowledge is included in government plans.

## Case study

### Cyclone survivor group helps Blessings recover

In Malawi, Cyclone Idai turned Blessings Chinyanda's\* life upside down. "My life took a totally different turn on 15 March 2019 when I lost my son," says Blessings. "The reality ... was hard to accept, but the new life was meaningless and all I wanted to do was sleep and never wake up again because I could not make sense of anything I was going through. I was homeless, had no one to go to, all the property was washed away and the only person who was taking care of me had passed on. Life was difficult and I was losing myself day by day."

Four months later, Blessings joined an older people's support group for those affected by Cyclone Idai. At first he thought he wouldn't talk about his experiences, but as the facilitators engaged participants in grief and bereavement discussions, Blessings learned that he was not the only one who had lost everything in the cyclone. "Two sessions went on with me just sitting in, but as time went on and without realising it, I was able to open up and also started

sharing my experiences; talking about what I went through, how I felt and what is happening to me now," he recalled. "I felt that having other people listen to me and empathise with me brought great relief. After joining the support group, I realised that [some] of the most comforting words in the world are "me too". Although the emotional pain does not go away overnight ... I feel I can continue with life because I have realised I am not alone."

Blessings and other group members have met regularly since, and have decided to start a garden as a way to keep themselves from dwelling on the past.

***"I have realised that the best part about a group is that you don't have to do everything alone."***

**Blessings Chinyanda**

\* To respect privacy, the name has been changed for publication.

**Below: In Mozambique, Albano Matunaga, 68, also received support to help him rebuild his life after Cyclone Idai. He cannot walk but was given a hand-powered tricycle to make it easier for him to get to hospital after the cyclone destroyed his house.**



Katie Barradough/Age International



## Responding to crises

In March 2019, already vulnerable communities in Malawi, Mozambique and Zimbabwe were devastated by Cyclone Idai, with Cyclone Kenneth hitting Mozambique the following month. In the wake of the cyclones, HelpAge worked with the Malawi Network of Older People's Organisations and the National Age Network of Zimbabwe to help more than 21,000 older people (the majority older women) to rebuild their lives, and provide them with emergency psychosocial support and primary health care. In Mozambique, the response was led by HelpAge partners Association for the Community Development of Sofala Province and Association of Older Persons in Tete, who together reached more than 10,000 people.

In the Asia Pacific region HelpAge and partners responded to 12 emergencies over the year, reaching almost 57,000 people in seven countries. The largest response continued to be for the 21,500 older Rohingya refugees from Myanmar now living in Bangladesh. We provided cash grants, supported income-generating activities, and delivered access to health and protection services and assistive products for older refugees with disabilities. In addition, we trained 262 health and care providers on the Humanitarian Inclusion Standards for older people and people with disabilities, ensuring that health services in the camps were accessible and appropriate for older people.

HelpAge Ukraine worked in a consortium with People in Need, an international NGO, to provide much-needed home-based care and psychosocial support to more than 2,500 older people (almost three quarters of whom were women) affected by the protracted conflict in the east of the country. HelpAge set up Community Safe Spaces for older people to meet for social activities, learn new skills and learn about their rights. HelpAge also set up and led an Age and Disability Technical Working Group, bringing members of the UN Protection Cluster in Ukraine together to strengthen local humanitarian policy and practice and deliver an inclusive response to the crisis.

Lebanon continued to host the highest number of displaced people (relative to its population) in the world.<sup>1</sup> HelpAge and our partners continued to promote the safety and dignity of older people and people with disabilities in Beirut, South Bekaa and North Lebanon, providing more 3,500 older



**Older people receive cash to help recover from the Sulawesi earthquake and tsunami.**

YAKUM Emergency Unit/HelpAge International

women and men from refugee and host communities with information on their rights and available health services, and screening more than 3,000 people for diabetes and hypertension. Twenty active older volunteers visited almost 700 older people in their homes, while another 180 were visited by mobile medical teams, and two community centres were made fully accessible to people with disabilities. Through these activities, older people and people with disabilities were better able to manage their health, develop important social networks, engage with the community, and improve their wellbeing.

## Influencing global humanitarian policy

Influencing is a core part of HelpAge's humanitarian work. Building on work in 2018 to influence the Global Compact on Refugees (a new framework for strengthening the way the world responds to refugee situations) we engaged with UNHCR and civil society partners to ensure that the Compact's Global Refugee Forum clearly incorporates older refugees in its protection work. We influenced the UN Independent Expert's report on older people's human rights in emergencies (presented to the Human Rights Council in September 2019), and provided expert input into the UN Secretary General's report and General Assembly resolution on the human rights of older people.<sup>2</sup> HelpAge also worked closely with the UN Global Protection Cluster to influence its new strategic framework for 2020–2024 which led to HelpAge being invited to join the cluster's strategic advisory group to advise on age inclusion in humanitarian crises.

1. UNDP Lebanon Country Response Plan 2017–2020

2. *Follow-up to the International Year of Older Persons: Second World Assembly on Ageing 2019*; the specific resolution is the General Assembly resolution A/RES/74/125.



# “My voice is heard”

Supporting older people to make their voice heard is at the heart of what we do, helping them claim their rights, make choices, and participate meaningfully in decisions that affect all aspects of their lives.

## In the past year:



**254,000** people were mobilised to campaign for better policies and practice for older people in 30 countries.

**2,817** Older People's Associations in 16 countries monitored the delivery of social pensions, health services and other entitlements.

**1.5 million** older people in five countries adopted age-friendly policies and programmes in response to the Sustainable Development Goals and international humanitarian law.

## Exposing ageism

On the International Day of Older Persons, our Age Demands Action (ADA) campaign staged a day of global action that resulted in more than 48,000 people – including 17,000 older campaigners – taking action against ageism.

In Kyrgyzstan, we partnered with the AgeNet network to organise an ADA march – the first time such an event was ever held in the country – which attracted the participation of the Deputy Prime Minister and Minister of Social Development and received wide media coverage. HelpAge also joined with Jordanian network member SIGI, Solidarity Is Global Institute, to hold a march on older people's rights, and to run workshops on the rights of older people.

In Bangladesh, three newspapers published articles on ageism, reaching at least 7.5 million readers, while in Tanzania we enabled 658 Older People's Forum (OPF) members to take part in media interviews and debates exposing ageism in families and communities, and discuss ways to address it.

In the course of the year we also ran workshops on ageism and how to tackle it, training more than 150 staff, partners and older people worldwide.

Qualitative research on older people's experiences of ageing and ageism was carried out in conjunction with network members in Gambia, Costa Rica and Serbia and the HelpAge country office in Pakistan. The report was presented at the 10th session of the Open-Ended Working Group on Ageing (OEWG) in April 2019 and at the British Society of Gerontology in June 2019.

Research was also conducted among older people in Uganda to understand ageism, its causes and consequences, and to identify strategies that policy makers and others can employ to mitigate. Overall, 97 per cent of the people surveyed had experienced at least one form of ageism, including being ignored, jokes at their expense, and the denial of accommodation and adequate health care. The research is being used by the government and other stakeholders as evidence in the drafting of the Older Person's Bill to protect the rights of older persons in Uganda.

## Amplifying older people's voices globally

Throughout the year HelpAge supported the participation of older people at global meetings to ensure their voices were heard in discussions about their rights and wellbeing.

Six older activists participated in the UN's 10th OEWG on Ageing in April 2019 through the Global Alliance for the Rights of Older People (GAROP). Bertha Elias Kasake Kijo, from Tanzania, Iswari Swar from Nepal, Gahire Kankindi Rose from Rwanda, Hafizur Moyna from Bangladesh, Jacob John Kattakayam from India and Paulette Mettang from Cameroon contributed to the session on ageing, making powerful statements and calling on governments to ensure that older people's rights are protected.



**Engedaworq Eshetu, 64, speaking at a leadership training event in Addis Ababa, Ethiopia, designed to equip older women with skills that will encourage them to take leading roles in their communities.**

## Case study

### Age Demands Action on World Humanitarian Day

HelpAge network members in the Latin America and the Caribbean region marked World Humanitarian Day (August 19) with an ADA campaign spotlighting the need to include older people in the region's disaster response plans. Almost 1,500 network member supporters took part directly in the campaign and almost 350,000 more through social media.

Three short video films featuring older people who had experienced the trauma of being overlooked during an emergency were made as part of the campaign, with the aim of helping the Argentine government and emergency response organisations understand the need to prepare the older population for future emergencies.

“Older people often face challenges when disasters occur,” says Carmen Maroni, a survivor of the devastating 2013 flood that left more than 200 dead in the city of La Plata, Argentina.

*“My husband was dragged by water more than 10 meters, and Antonio fell beyond. At 1 in the morning, the only thing we saw was water and nobody came to help us. I studied first aid, and I know how to help someone, but at that time nobody could help me.”*

The campaign encouraged Peruvian officials to sign a letter of support showing willingness to include dedicated services for older people during natural disasters, while workshops in Haiti and Colombia were attended by local authorities such as Civil Protection Officers and staff from the Mayor's Office to help them understand the importance of providing such services.

**Below: Older people in Peru take part in a seminar on ‘Making the Rights of Older People Visible in Emergency Situations’, equipping them to contribute to municipal emergency responses.**



Mesa de Trabajo de ONGs y Afines sobre las Personas Adultas Mayores

### Voice amplified through older people's platforms

Around the world, older people's platforms played an important role in raising the voices of older people. In Asia, OPAs raised members' concerns with local authorities, governments and service providers, and through Intergenerational Self-Help Clubs.

HelpAge supported the formation of ageing networks in Cambodia, Myanmar and Thailand – each comprising around 14 civil society organisation members working with older people to collectively advocate for their needs and ensure their were heard in bringing about policy change. For example, in Vietnam, HelpAge facilitated the sharing of older people's feedback on current social services (e.g. primary health care, health insurance, social allowance and education) with WHO and government ministries. HelpAge also supported the participation of the Association of Elderlys in the country's Disaster Risk Management Technical Working Group.

In Uganda, 22 new OPAs were formed, running activities ranging from village savings and loans groups (which support members to save collectively and access low-interest loans) to discussing local development issues and providing peer psychosocial support. Sub-committees made up of older citizen monitoring groups gathered evidence on older people's

needs on issues such as shelter and complaints to humanitarian service providers during emergencies. The groups successfully advocated for priority to be given to older people caught in humanitarian crises – they are now served first in their own queue for food distribution and prioritised for repairs to shelters.

In Tanzania, HelpAge supported the development of guidelines setting out how to form and run an OPF. The guidelines were later adopted by the President's Office, as well as by regional administration and local government bodies responsible for running government policies and programmes.

### Building support for a UN convention on the rights of older people

The number of states supporting the call for a convention on the rights of older people rose by 12 this year, taking the total to 42 countries, with the UN High Commissioner for Human Rights also joining the call.

Through network members and partners we consulted more than 300 older people across 24 countries on their rights to justice and to work to produce the *Keeping Our Dignity* report. This provided the basis for written submissions from HelpAge and network members for the 11th session of the OEWG on Ageing. These submissions were reflected in the documents prepared by the OEWG secretariat for the session.





Ben Small/HelpAge International

**The wheelchair HelpAge gave Belyssia enabled her to access health and sanitation facilities in the refugee camp where she lives in Tanzania, meaning she does not have to spend all day indoors. Advocacy is vital in helping older women like her.**

Ahead of our planned participation at the OEWG, our work to promote the UN convention was underpinned by a communications strategy designed to generate real engagement with and support for the convention. A guide on how to communicate about the convention was produced for civil society organisations and promoted through a series of webinars. We also supported GAROP to hold two regional workshops in Africa and Asia to undertake national advocacy on the rights of older people and the need for a UN convention.

In Latin America and the Caribbean we partnered with network members to advocate for adoption of the Interamerican Convention Against the Discrimination of Older People in countries that are yet to become signatories. In Colombia, HelpAge partnered with network members Red COENVE – the Colombian Network Association for Active and Decent Ageing – and Consejos de Sabios to lobby the National Congress to approve the convention. Together we convened 81 civil society organisations in events and advocacy activities which resulted in the Congress voting in favour of the resolution to approve the convention.

## Using the SDGs to advance older people's rights

HelpAge and network members continued to use the Sustainable Development Goals (SDGs) to advance the rights and inclusion of older people. We developed three key resources to support advocacy work at global, regional and country levels, including a practical advocacy guide, *Ageing and the SDGs – six steps to older people's inclusion* – containing recommendations on how global development must meet older people's needs and rights if it is to be sustainable.

HelpAge and network members established relationships with government ministries to influence SDG implementation at country level. For example, in Jordan, HelpAge engaged with the Ministry of Planning and International Cooperation to push for the country's SDG plan to include the needs of older people.

In Tanzania, HelpAge partnered with the Persons with Disability Forum to deliver a *Leave No One Behind* report to advocate for marginalised populations to be included in progress towards the SDGs. Research by network member Red Cross of Serbia contributed to debates about more inclusive public policies for meeting the SDGs, including on intergenerational attitudes and the social inclusion of older people. The research was presented to the Serbian government's Council for Ageing.



We continued to raise awareness and lead on issues of ageing and older people's inclusion in SDGs globally through our role in the Stakeholder Group on Ageing (SGA), and engagement with the High Level Political Forum, as well as through our leadership of SGA Africa. This group has been formally recognised as part of the Africa Regional Engagement Mechanism coordinated by the UN Economic Commission for Africa which played a key role in ensuring the inclusion of ageing and older people in the outcome documents of the 2020 Africa Forum for Sustainable Development.

### First Arab Forum for Older People

The first Arab Forum for Older People was held in December in 2019 in Amman, Jordan, organised by the National Council for Family Affairs, in cooperation with the Ousrati Association, the Ministry of Social Development, and HelpAge International. It provided an opportunity to share knowledge and experience about older people's issues in the region with a focus on rights and legal support and health and care. HelpAge network member SEMA reported on services provided to older people in Turkey.

### Improving urban environments for older people

HelpAge research on urban issues involving 1,300 older people in Delhi and Nairobi, funded by the World Bank, culminated in the publication of *Ageing and place: exploring how cities shape older people's lives*. Older participants in the research shared insights into their experiences of urban life, transport, pollution, personal safety, loneliness and isolation, and green spaces. The research highlighted how the environment affects the experience of older age, how movement around a city is restricted as we age, and that cities further marginalise those already excluded from spaces, services and society in older age. Community groups of older people in each of the research locations were trained to lobby local authorities for improvements in their communities, resulting in improved green spaces and water supply infrastructure, better behaviour by local taxi (matutu) drivers, and the inclusion of older people's voices and experiences in local policy and decision making.



Fedaa Qataishah/HelpAge International

**An older man attending an awareness session on osteoporosis at Al Dhulail, in Zarqa region, as part of HelpAge's series of health awareness activities in Jordan.**

# Gender equality and disability inclusion

**This year we continued to make progress on gender equality and disability inclusion in our humanitarian, development and advocacy work, broadening our engagement with network members and recognising different ways in which older women and men, and those with disability, experience ageing.**

## Influencing on gender and ageing

HelpAge worked with the Women Deliver 2019 conference, co-organising three health and care related sessions in collaboration with the NCD Alliance and FIGO.<sup>3</sup> Focusing on women (including older women), the sessions discussed access to quality health care across the life course, NCDs, and mental health.

In Vietnam, HelpAge's work with the Vietnam Women's Union to influence the National Gender Indicator Set

saw the requirements change in terms of minimum levels of data disaggregation for 60+ and the removal of age caps to support a better understanding of the situation for older women and men.

And 25 years after the 1990 Beijing Declaration and Platform for Action – seen at the time as the strongest statement ever made in favour of the advancement of women's rights – HelpAge, with support from Age International, fed into regional-level activity in the lead-up to the 64th session of the Commission on the Status of Women (CSW64). Our input at regional fora marking the anniversary of the Platform for Action led to older women's issues and rights being included in the Asia Pacific and Africa Civil Society Reports and Regional Declarations on Beijing+25.

## Case study

### Making older women visible

Margaret Kabango (pictured below), a 76-year-old activist from Kampala, Uganda spoke at one of the HelpAge-organised sessions and other events at the Women Deliver conference.

Margaret, who is also a board member of the Uganda Reach the Aged Association, was inspired to advocate for older people's right to health through her personal experience in accessing health services and her career as a government health worker. She was a Senior Principal Physiotherapist before retiring.

Margaret was invited to the conference by HelpAge to share the platform with global gender and health stakeholders and to help raise the visibility of older women.

***"I want to see older women included in discussions about health, economic empowerment, unpaid care, and sexual and reproductive health and rights. I want to see them included in more policies, programmes and campaigns, so they can also access essential healthcare services and have the tools, confidence and knowledge to seek help when needed."***

**Margaret Kabango**

The discussions facilitated by HelpAge on older women's health were a first step in ensuring Women Deliver takes a more inclusive approach to older people in future conferences. In the conference's closing ceremony the CEO of Women Deliver highlighted the role older women play and thanked them for everything they have done for gender equality.



HelpAge International



## Collecting data that includes everyone

HelpAge continued to work with the Global Partnership for Sustainable Development Data through the Inclusive Data Charter (IDC), calling on the data-gathering community to ensure data are disaggregated by sex, age, and disability, thereby enabling a true picture to emerge of the needs of older people and people with disability. HelpAge and members of the IDC provisionally agreed to develop an open-source, user-friendly tool to enable standardised analysis of disability data.

This year we focused on promoting greater uptake of minimum standards for sex, age and disability disaggregated data (SADDD) in our programmes, in order to facilitate better data, analysis, and evidence for strengthening gender and disability inclusion in our own and others' work. Teams working on our Strengthen Asia Network on Ageing programme in Bangladesh, Cambodia, Indonesia and Vietnam received guidance and training to improve their data collection and analysis.

## Influencing on ageing and disability

As a member of the International Disability and Development Consortium we promoted the rights of older people with disabilities through submissions to the 2020 Conference of States Parties to the Convention on the Rights of Persons with Disabilities, and to the Convention's strategic review. This helped us influence humanitarian responders globally to include older people and people with disabilities in their humanitarian responses.

In Latin America and the Caribbean we strengthened our relationship with the Mexican National Human Rights Commission, and were invited to participate in a leading Disability and Inclusion forum in Oaxaca, México held by the Commission, which focussed on human rights tools such as the Charter for Change, Humanitarian Inclusion Standards, Sphere and the Interamerican Convention.

And in the Eurasia and Middle East region, in line with WHO's Global Disability Action Plan 2014–2021, HelpAge continued to push for protection concerns for older people and people with disabilities to be prioritised by care providers, humanitarian actors, and relevant government ministries.

## Humanitarian Inclusion Standards

Inclusion training for HelpAge partners and international NGOs and donors on understanding and applying the Humanitarian Inclusion Standards was carried out in Bangladesh, Ethiopia, Indonesia, Jordan, Mozambique, Myanmar, Pakistan and Uganda. More than 250 people from a range of international and national NGOs, donors and government representatives have received inclusion training since early 2018.

## Strengthening gender and disability inclusion

During the year we deepened our understanding of inclusion across all areas of work and pursued our Global Gender Action Plan, which provides guidance on how to build gender issues into our work across the organisation through 10 commitments.

Other achievements included the development and launch of a new tool to ensure staff build gender into all advocacy work; the setting of new targets on gender analysis in advocacy; and the use of SADDD and gender analysis in funding proposals.

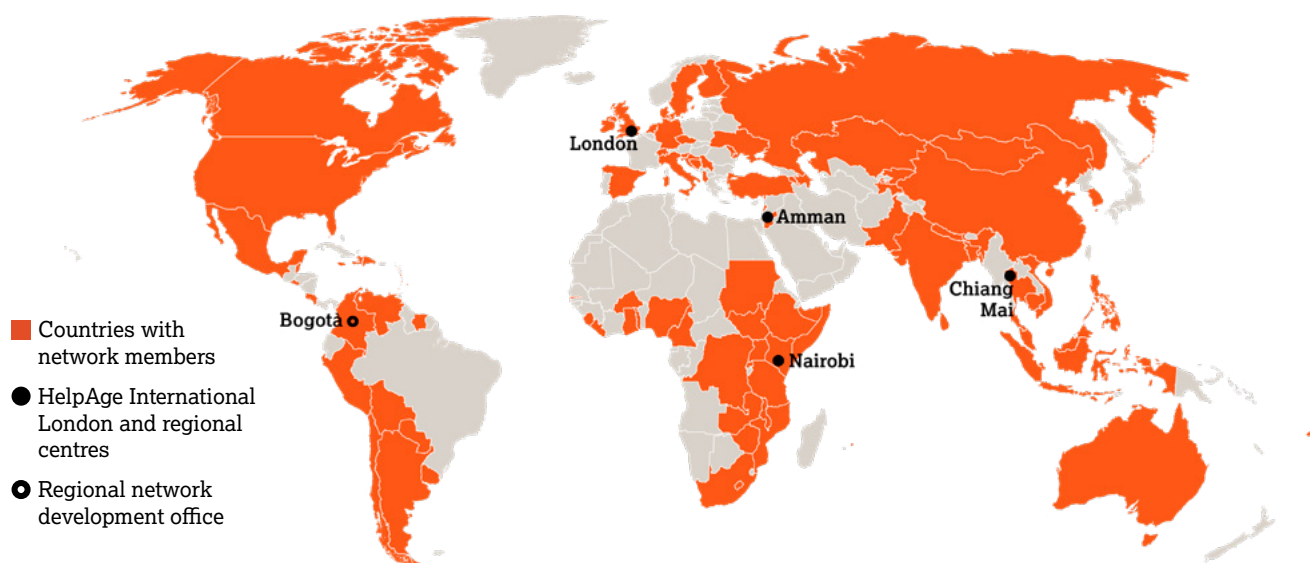
We continued to frame social pensions as a key to gender equality in older age (as opposed to contributory schemes that often mirror inequalities between men and women in older age), and in Asia, our pension policy course implemented jointly with the ILO and UNESCAP featured sessions dedicated to gender and pension design. AFFORD, our social protection project in the Africa region, produced briefings to support the development of gender-sensitive recommendations for decision makers formulating social pension policies in Ethiopia, Malawi, Mozambique and Tanzania. And in Zanzibar, an impact evaluation carried out by HelpAge of the universal pension scheme involved gender and disability-disaggregated data collection and analysis.

Gender equality and disability inclusion continued to be promoted in our community-based work through developing and supporting OPAs. In Indonesia, in recognition of the barriers faced by older women in participating in OPA activities due to caring roles, childcare was provided to free up time to help them take part.

In Bangladesh, women's leadership was promoted through allocating lead roles to women in OPA sub-groups to build their confidence and skills. This has led to greater leadership from women overall. And in the Rohingya refugee camps, committees for the management of services were required to comprise 50 per cent older women in decision-making roles, boosting women's leadership in the Rohingya community. We also created income-generating opportunities for women in the community, empowering older women who are more likely to live alone, be widowed or abandoned.

3. Women Deliver is an organisation that advocates for gender equality and the health and rights of girls and women; FIGO is the International Federation of Gynecology and Obstetrics; and the NCD Alliance is an international network advocating on behalf of people at risk of, or living with, NCDs.

# HelpAge global network



**This year we strengthened our collective reach and influence by welcoming 17 new members to the global network, taking the combined strength of our global network to 148 organisations in 85 countries, creating a truly global movement for change.**

## Strengthening network engagement

This year network engagement was stronger than ever thanks to a number of new systems, tools and ways of working that enabled better communication, knowledge sharing, learning and capacity building within the network, and the creation of common goals shared by members regionally and globally.

We developed the network database – a tool to help staff work with, through and for the network – and delivered organisation-wide training in its use during 2019. We also used data gleaned in the ‘Getting to Know You Even Better’ network mapping survey carried out in 2018–2019 to inform our understanding of network members’ interests and what resources we needed to develop to support them. These tools helped facilitate increased engagement with members, evidenced by a 40 per cent increase in membership fees collected across the network in the 2018/19 financial year.

## Bringing the network together

Network-building was enhanced through virtual and face-to-face meetings of regional and sub-regional networks. In Latin America, the sub-regional network met in Buenos Aires, hosted by network members ISALUD and AMIA, while HelpAge’s Western European Network met in Helsinki in October, hosted by Finnish network member Valli. The European meeting successfully built understanding of member priorities and capacities, enabled the sharing of local experiences and approaches, and generated commitment to collaborate across the network.

HelpAge used these meetings to introduce the proposed vision of Strategy 2030 and secure the support of members to align their action plans with the new strategy.

## Strengthening learning and knowledge sharing

The development of an online Knowledge Platform to facilitate learning and sharing information with and between network members continued in 2019. Of note, 53 network members utilised the social protection and health hubs which were launched on the Knowledge Platform during the year. Network members were also invited to engage with three pre-existing learning groups – on social protection, health and care, and gender.

An evaluation of the platform was carried out to identify how best to develop it to enhance network member learning. The evaluation highlighted that users visit regularly to access information and share materials – such as the latest reports and guidelines – with colleagues and other members.

Learning events and training sessions were organised in many places throughout the year. In Asia, a regional learning event on OPAs was held, along with a training session on community driven development and a workshop on disaster risk management. And in Kyrgyzstan, HelpAge delivered face-to-face and virtual training to enhance the capacity of AgeNet to combat ageism and promote the UN convention on the rights of older people.

These events also helped promote the development of peer-to-peer learning among network members. For instance, network member Ageing Nepal visited network member in Thailand, forOldy, to learn about social enterprise, while the Vietnam Association of Elderly visited the China National Committee on Ageing.



## Our global network members

### Africa

Africa Development Aid, Sudan  
 Age in Action, South Africa  
 Ageing with a Smile Initiative (ASI), Gambia  
 Almanar Voluntary Organization (AMVO), Sudan  
 Cameroon Association for Elderly Care (ACAMAGE)  
 Association of Retired Persons, Mozambique (APOSEMO)  
 Centre for Community Advancement and Family Empowerment (CECAFE), Liberia  
 Coalition of Societies for the Rights of Older Persons in Nigeria (COSROPIN)  
 Community Development Volunteers for Technical Assistance (CDVTA), Cameroon  
 Current Evangelism Ministries (CEM), Sierra Leone  
 The District Pastoral Association (DPA), Kenya  
 Droits Humains Ocean Indien (DIS-MOI), Mauritius  
 Elim Hlanganani Society for the Care of the Aged, South Africa  
 Ethiopia Elderly and Pensioners National Association (EEPNA)  
 The Fantsuam Foundation, Nigeria  
 Moje Foundation, Cameroon  
 Grandmothers Consortium, Uganda  
 HelpAge Democratic Republic of the Congo (DRC)  
 HelpAge Ghana  
 HelpAge Kenya  
 HelpAge Zimbabwe  
 Health Nest Uganda (HENU)  
 Humanitarian and Development Consortium (HDC), South Sudan  
 Kaalmo Relief and Development (KRD), Somalia  
 Kenya Society for People with AIDS (KESPA)  
 Kenyan Aged People Require Information, Knowledge & Advancement (KARIKA)  
 Malawi Network of Elderly Persons' Organisations (MANEPO)  
 The Maseru Senior Women's Association, Lesotho  
 Mauritius Family Planning and Welfare  
 Muthande Society for the Aged (MUSA), South Africa  
 NSINDAGIZA, Rwanda  
 Pamoja Community Based Organisation (PAMOJA), Kenya  
 Promo-Femmes/Development Solidarite (PF/DS), Burkina Faso  
 Reach One Touch One Ministries, Uganda  
 The Regional Centre for the Welfare of Ageing Persons (RECEWAPEC), Cameroon

Relief to Development Society (REDESO), Tanzania  
 Rift Valley Children and Women Development Organisation (RCWDO), Ethiopia  
 Sawaka-Karagwe (SAWAKA), Tanzania  
 Senior Citizen's Council of Mauritius (SCC)  
 Senior Citizens Association of Zambia  
 Sierra Leone Society for the Welfare of the Aged  
 South Sudan Older People's Organization (SSCOP)  
 Sudanese Society for the Care of Older People  
 Tanzania Mission to the Poor and Disabled  
 Tesfa Social and Development Association (TSDA), Ethiopia  
 Uganda Reach the Aged Association  
 Univers de Solidarité et de Développement in Togo (UNI.SOL.D)  
 VUKOXA, Mozambique

### Asia and Pacific

Ageing China Development Centre (ACDC)  
 Ageing Nepal  
 Bangladesh Association for the Aged and Institute of Geriatric Medicine (BAAIGM)  
 Bangladesh Women's Health Coalition  
 Centre for Ageing Support and Community Development (CASCD), Vietnam  
 Centre for Human Rights and Development (CHRD), Mongolia  
 China National Committee on Ageing  
 Coalition of Services of the Elderly (COSE), Philippines  
 Council on the Ageing (COTA), Australia  
 Dhaka Ahsania Mission (DAM), Bangladesh  
 Faculty of Nursing, Chiang Mai University, Thailand  
 Fiji Council of Social Services  
 Help Without Frontiers  
 Thailand Foundation (forOldy)  
 Foundation for Older People's Development (FOPDEV), Thailand  
 Gramin Vikas Vigyan Samiti (GRAVIS), India  
 HelpAge Cambodia  
 HelpAge India  
 HelpAge Korea  
 HelpAge Sri Lanka  
 Helping Hand Hong Kong, China  
 Instituto de Ação Social, China  
 Mongolian Association of Elderly People  
 The National Council of Senior Citizens Organisations Malaysia (NACSCOM)  
 National Senior Citizen Federation, Nepal

Nepal Participatory Action Network  
 Pakistan Medico International Resource Integration Centre (RIC), Bangladesh  
 Senior Citizen Council of Thailand  
 Society of Women's Initiative for Ageing Successfully, Singapore  
 Tsao Foundation, Singapore  
 Vietnam Association of Elderly (VAE)  
 Yayasan Amal USIAMAS, Malaysia

### Eurasia and the Middle East

Albanian Association of Geriatric and Geriatrics (AAG)  
 Alzheimer's Association Lebanon  
 ARDAGER, Kazakhstan  
 Armenia-Azerbaijan Civil Peace Platform, Azerbaijan  
 Central Asia Gerontology Center, Tajikistan  
 Centre for Studies on Ageing, Lebanon  
 Dobroe Delo, Russia  
 El Wedad Society for Community Rehabilitation, Palestine  
 House of Projects, Russia  
 Mission Armenia  
 Association for Psychosocial Help and Development of Voluntary Work (OSMIJEH), Bosnia and Herzegovina  
 Palestinian Centre for Communication and Development Strategies  
 Red Cross of Serbia  
 Resource Centre for Elderly (RCE), Kyrgyzstan  
 Solidarity Is Global Institute (SIGI), Jordan  
 Syrian Expatriates Medical Association (SEMA), Turkey  
 Turbota pro Litnix v Ukraini (TLU), Ukraine

### Latin America & Caribbean

Asociación Central de Funcionarios Públicos y Docentes Jubilados, Paraguay  
 Asociación Cultural Casa del Niño, Colombia  
 Asociación Fundación para la Cooperación y el Desarrollo Comunal de El Salvador (CORDES)  
 Asociación Gerontológica Costarricense, Costa Rica  
 Asociación Mutual de Protección Familiar (AMPF), Argentina  
 Asociación Mutual Israelita Argentina (AMIA)  
 Asociación Red Colombiana de Envejecimiento Activo y Digno, Colombia  
 Caritas Chile  
 Consejo Distrital de Sabios y Sabias, Colombia  
 Convite Asociación Civil, Venezuela

Dominica Council on Ageing  
 Fundación Centro de Estudios e Investigaciones del Trabajo (CESTRA), Colombia  
 Fundación Horizontes, Bolivia  
 Fundación ISALUD, Argentina  
 Fundación Navarro Viola, Argentina  
 NTD Foundation, Dominican Republic  
 Fundación SIDOM, Argentina  
 Haitian Society for the Blind (SHAA)  
 HelpAge Belize  
 The National Foundation for Blind Care Suriname (NSBS)  
 Peru Coordinating Group for Older People (Mesa Perú)  
 Pro Vida Colombia  
 Pro Vida Perú  
 Fundación Red de Actividad Física para Adultos Mayores (RAFAM), Argentina  
 Reaching Elderly Abandoned Citizens Housebound (REACH), Dominica  
 Rhizome Center for Migrants, Mexico  
 Servicio Social de Iglesias Dominicanas Inc (SSID), Dominican Republic  
 St. Vincent de Paul Antigua, Antigua and Barbuda  
 Sumaj Punchay, Bolivia  
 Uruguayan Association of Animators and Gerontological Assistants (AUDAAG)

### North America

AARP, USA  
 HelpAge Canada  
 HelpAge USA

### Europe

Age Action Ireland  
 Age International, UK  
 Beauty of Help Foundation (NKP), Czech Republic  
 Caritas Malta  
 Centre for Policy on Ageing, UK  
 Croatian Red Cross City of Valpovo  
 DaneAge Association, Denmark  
 Dorcas, Netherlands  
 Globale Seniorer, Denmark  
 HelpAge Deutschland  
 HelpAge España  
 HelpAge Italia Onlus  
 Kwa Wazee Switzerland  
 Pensionäernas Riksorganisation (PRO), Sweden  
 Slovene Philanthropy, Slovenia  
 Valli, the Union for Senior Services, Finland  
 World Granny, Netherlands  
 Zivot 90, Czech Republic



Fedaa Qataishah/HelpAge International

**As part of a project to promote community cohesion through gardening, a group of older women came together to plant flowers and seedlings in the backyard of HelpAge Jordan's Knowledge and Resource Hub in Amman.**



# Our plans for 2020/21

2020 sees HelpAge embark on Strategy 2030, our new organisational roadmap that will guide our work for the next decade, with the strategic goal of enabling millions of older people to enjoy a better quality of life through improved wellbeing, enhanced dignity, and greater voice.

Reflection on our progress to date reveals the key learnings we need to embed in our work under our new strategy, and which can be summarised as the following:

## **The importance of empowering older people**

Supporting older people to identify their own issues and enabling engagement between older people and other stakeholders has been a success factor in our work. Going forward, our activity must consistently be based upon older people's views and experiences, and this is fundamental to our governance and accountability. We must bring together strong and committed older people's representatives and build their lobbying and advocacy capacity. This is critical for all strands of our work, as it will support older people's meaningful participation at every step.

## **The value of partnerships with network members**

There is a clear benefit in making strong links between grassroots movements and policy makers to enable change, both in advocating for policy change and in programme implementation. HelpAge has a clear role in supporting these connections and we must build on this by identifying opportunities to invest in local partners for change. We should continue to focus on building networks and partnerships, bringing in technical expertise and specialists through professional associations, and must strengthen our links with CSOs, NGOs and governments.

## **A systematic approach to power and voice**

There must be a deeper understanding of power and power dynamics in the way we design our work with partners and communities. We need to build more meaningful participation for older people and overcome barriers to inclusion, access, and change. We are committed to rolling out the Voice Training Toolkit and Voice framework in order to ensure staff, network members and partners have the skills and understanding they need to strengthen our work raising the voice of older people.

**The life-course approach** This approach aims to increase the effectiveness of interventions throughout a person's life. It has been invaluable in encouraging broader dialogue with stakeholders on the need to consider older people's needs in terms of social protection, or protection from violence and abuse. Continued use of the life-course approach will open up the potential for partnerships with organisations working with other age groups, as well as help influence governments to include older people in their policies and support systems even where resources are thinly spread.

## **Embedding the new strategy**

The new strategy will see us work with network members and partners through three interlinked core functions: as a supporter, convener and thought leader. In the first year of Strategy 2030 we will focus on strengthening our convening and thought-leadership roles.

Two key factors will influence the new strategy's early years:

## **Organisational change to deliver the strategy**

We will review our organisational structure, functions, and ways of working to ensure that HelpAge is in the best possible place to deliver on the strategy. This review will need to factor in the significant financial challenges caused by the economic impact of the COVID-19 pandemic and the expected reduction in our core funding in the 2021/22 financial year.

## **Impact of COVID-19 on older people**

COVID-19 hits older people hardest and they have been disproportionately affected by the pandemic. This presents significant challenges for low- and middle-income countries where health and care systems already struggle to meet the needs of their ageing populations.

In responding to COVID-19 our objective will be to uphold older people's wellbeing, dignity and voice by reducing their risk to COVID-19 and ensuring equal access to prevention measures, support and services. We will advance this in 2020/21 across all of our global priority focus areas in Strategy 2030.

## Global priorities for 2020/21

The new strategy comprises 10 focus areas that contribute to our overarching goal of enabling millions of older people to enjoy a better quality of life through improved wellbeing, enhanced dignity and greater voice. For our 2020/22 Organisational Business Plan, these focus areas fall into three groups:

### Global priority focus areas

Six areas of work where we will expand our existing portfolios and strengthen our effectiveness are:

- *Healthy ageing*
- *Income security*
- *Inclusive humanitarian action*
- *Freedom from violence, abuse and neglect*
- *Age-inclusive systems*
- *Movement for change*

### Developmental focus areas

Two areas where we will expand our existing knowledge, strengthen our capabilities and share approaches to inform future work are:

- *A society for all ages*
- *A stand against ageism*

### Exploratory focus areas

Two new areas where we will deepen our understanding of effective approaches and explore how best to take them forward, learning from pilots and research are:

- *Lifelong learning*
- *Embracing technology*

## Strategy 2030

We want every older person, everywhere,  
to be able to say:

**“I enjoy  
wellbeing”**

**“I am treated  
with dignity”**

**“My voice  
is heard”**

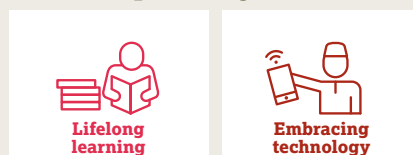
### Global priorities:



### Developmental areas:



### Exploratory areas:



We act as:





**Based on the vision of Strategy 2030 and the challenges emerging from the impact of COVID-19, our specific priorities for 2020/21 are:**

**Healthy ageing** We will continue to promote healthy ageing, including through the implementation of universal health coverage and long-term care and support systems, supported by regional and global research and advocacy. We will support network members to engage with our work to support WHO's efforts to ensure the voices of older people are included prominently at the start of the UN Decade of Healthy Ageing (2020-30) and catalyse meaningful engagement with older people and their families, caregivers and communities throughout the decade. In our global response to the COVID-19 pandemic we will work to ensure older people can safely access health services and support for both COVID-19 and other health issues. This includes enabling older people and people with disabilities to receive information about reducing and mitigating their risk of contracting COVID-19 in a diversity of languages and formats, using accessible technologies.

**Income security** We will continue to promote social pensions and gradually expand our focus on ensuring how adequate, inclusive, accessible and well implemented they are, while supporting the development of legal frameworks for social pensions and facilitating peer-learning and evidence generation. We will start to expand our evidence base on the issues affecting older people's access to 'decent' work and explore options for ensuring their inclusion and non-discrimination in the future 'world of work'. In our global response to the COVID-19 pandemic we will work to ensure older people can safely access adequate social protection to ensure income security.

**Inclusive humanitarian action** We will promote age-inclusive humanitarian preparedness and response that ensures older people are fully assisted, protected and safe. In our response to the COVID-19 pandemic, we will work to ensure older people have full access to COVID-19 assistance, and that those living in low-income countries, including those with fragile humanitarian contexts, are able to access appropriate humanitarian assistance in safety and with dignity. We will promote inclusion of older people in COVID-19 preparedness, protection and response policies by developing plans and systems with governments and other key humanitarian actors.

**Freedom from violence, abuse and neglect** We will continue to expose the risks of violence, abuse and neglect faced by older people, with a focus on older women. We will work with network members and others to take action, including in response to the impacts of COVID-19. We will strengthen alliances with key stakeholders working on gender-based violence, violence against women, and violence, abuse and neglect at all levels. This will happen in



part via our engagement with the Generation Equality Action Coalitions formed to deliver concrete and transformative change on gender equality and women's and girl's rights globally in the coming five years.

**Age-inclusive systems** We will continue to call for the ratification of age-inclusive laws, policies and systems that guarantee older people's rights across all sectors, and will monitor their implementation and hold actors to account. Our global work will focus on providing advocacy and campaigns leadership and support to ensure that the dignity and wellbeing of older people are central to the work of international institutions, donor governments and civil society organisations in responding to COVID-19 and planning for recovery with national governments. We will situate our work on the UN convention on the rights of older people, the SDGs and taking a stand against ageism in the context of 'building back better' from the COVID-19 pandemic. We will support the civil society platform Global Alliance for the Rights of Older People (GAROP) by providing hosting and technical support in relation to its work towards a UN convention on the rights of older people and will also host and provide technical support to CommonAge to strengthen influencing on age-inclusive systems in Commonwealth countries.

**Movement for change** We will continue to support older people and civil society to unite and demand change by mobilising a people's movement for a fairer world in which everyone may grow old. We will promote older people's rights and transform the way people think, feel and act on ageing. We will pilot and roll-out our new Voice Framework and Training Toolkit and will use our ADA campaign platform in our global response to the COVID-19 pandemic to mobilise older people. We will also work to ensure OPAs play a key role in the delivery of an inclusive response to the COVID-19 pandemic.

# Five years of achievements

This year saw the end of our 2015–2020 plan as we geared up for Strategy 2030.

As we embark on this new chapter, we reflect on some of the key highlights of HelpAge and its partners' work over the past five years, strengthening the incomes, health, security, and voices of older people worldwide.

**For each of the past five years, on average, we have...**

## ... raised older people's income



**6.2 million** older people in 14 countries received a social pension for the first time through new or expanded schemes.

**£1.64 billion** was paid to older people in 14 countries annually in the form of social pensions as a result of our advocacy work.

**138,700** people in 15 countries were supported to start or build their livelihoods.

**27,500** older people affected by crises received livelihood support or cash support.

## ... helped older people stay healthy



**14 million** older people in seven countries benefitted from changes in government health and care policies, driven by HelpAge's advocacy and campaigns.

**400,000** older people were supported by HelpAge's health and care projects (excluding emergency responses).

**35,000** older people received health or care support during the early phases of our emergency responses.

## ... reduced violence, abuse and neglect



**300,000** older people at risk of violence, abuse and neglect were supported by HelpAge, its partners and government ministries in 12 countries.

**60,000** older people received protection support during the early phases of our emergency responses.

## ... amplified older people's voices



**170,000** older people took part in our global, regional and national campaigns in 43 countries.

**2,500** Older People's Associations with 46,000 members monitored the delivery of support and services in their communities and lobbied for improvements.

**12** more governments supported the call for a UN convention on the rights of older people.

**22 million** older people, across 18 different countries, potentially benefitted from governments and other agencies revising or adopting new age-inclusive policies.





Ben Small/HelpAge International

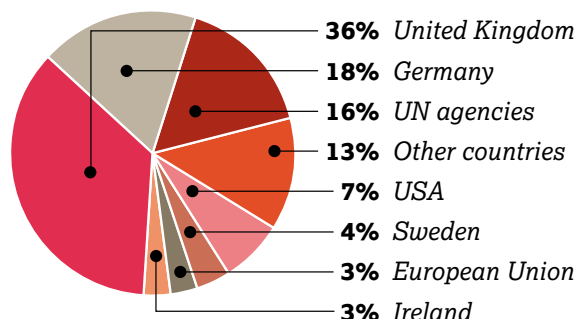
# Governance and finance

*Financial statements 2019/20*

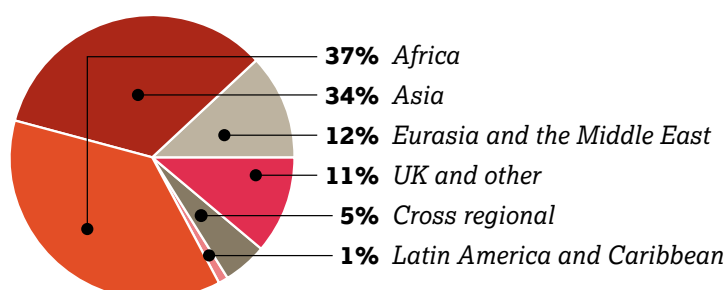
## Financial review

# Income and expenditure at a glance

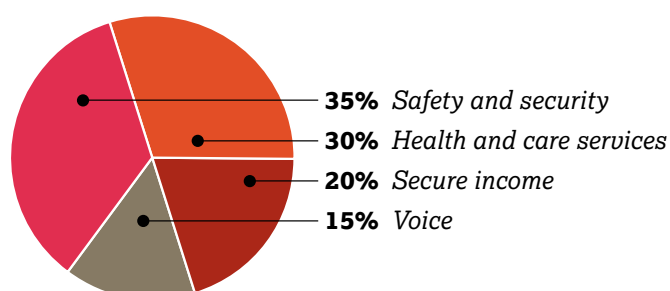
### Where our money came from £20.7m



### Where we spent this money £21.3m



### How we spent this money £21.3m



## Notes

Income in 2019/20 was £21m.

100% of the expenditure was on charitable activities.  
No fundraising costs were incurred for generating voluntary income because we do not raise funds from the public.

### Highlights of our financial performance

	Year to 31 March 2020 £m	Year to 31 March 2019 £m
<b>Income</b>		
Restricted	14.2	15.7
Unrestricted	6.5	6.3
<b>Total income</b>	<b>20.7</b>	<b>22.0</b>
<b>Expenditure</b>		
Restricted	(14.8)	(15.3)
Unrestricted	(6.4)	(6.0)
<b>Total expenditure</b>	<b>(21.2)</b>	<b>(21.3)</b>
Net restricted income / (expenditure) for the year	(0.6)	0.4
Net unrestricted income / (expenditure) for the year	0.1	0.3
<b>Net income / (expenditure) for the year</b>	<b>(0.5)</b>	<b>0.7</b>
Actuarial gains on final salary pension	0.1	0.1
<b>Net income / (expenditure) including actuarial gains / losses on final salary pension</b>	<b>(0.4)</b>	<b>0.8</b>
Funds at the start of the year	6.4	5.6
Total funds carried forward including pension liability	6.0	6.4
Pension liability	0.5	0.8
<b>Funds excluding pension liability</b>	<b>6.5</b>	<b>7.2</b>
<b>Funds</b>		
Restricted	4.5	5.1
Unrestricted general	2.0	2.1
<b>Funds excluding pension liability</b>	<b>6.5</b>	<b>7.2</b>



## Corporate governance report

# Managing the risks to achieve our strategy and future prospects

HelpAge International aims to bring lasting, positive change to the lives of older women and men in low- and middle-income countries, many of whom are living in areas that are prone to crisis and that present insecure and unstable operating environments. There are necessary risks involved in maintaining our presence and delivering our programmes, including the duty of care and safeguarding risks to our staff and the older people we seek to help, and accountability to the institutions and organisations that entrust funds to us.

The senior leadership and Trustees of HelpAge International are responsible for ensuring that the major risks facing HelpAge are managed appropriately and regularly reviewed, both to reduce the likelihood of those risks materialising, and to mitigate the impact where they do.

We maintain an organisational Risk Register that covers and lists the main security, strategic, operational and financial risks. It is compiled based on a formal risk assessment review conducted twice a year by our most senior staff and updated with the consultation of the Executive Director team. The register monitors the increase or decrease in nine strategic risks related to: unrestricted income, people, safety and security, robustness, awareness and compliance to key operational policies and statutory policies, efficiency and accountability, liquidity and cash flow, programme delivery, communications, and network and partnership; and the steps taken to mitigate these risks.

With the COVID-19 pandemic starting to impact the business and operations of the organisation, we are closely monitoring the following risks:

**Unrestricted income:** The risk remains high as our key strategic partner Age International/Age UK is facing financial challenges with its income due to the impact of the extended lockdown on their business operation. This is likely to significantly reduce the strategic grant from Age International/Age UK over the next few years. Moreover, restricted funding from different multi and bilateral donors is also likely to decrease with many donor countries focusing on reviving their own economies impacted by the COVID-19 pandemic. HelpAge is carrying out a strategic review of the business and operational model to address the imminent drop in unrestricted income.

**Programme delivery and compliance:** The COVID-19 related lockdown in many countries where HelpAge operates has considerably hampered and delayed our programme work. This increases the risk of not meeting our commitments to our key

stakeholders. Moreover, limited face-to-face support and monitoring of programme work is also potentially increasing the risk related to programme quality and compliance. To mitigate some of these risks, we have developed and rolled out remote programming guidelines and started remote monitoring and support using digital communication tools.

**People, safety and security:** Extended and unprecedented remote working, along with imminent restructuring of the organisation, has had a very unsettling impact on staff. These factors have the potential to impact staff wellbeing, motivation and productivity. We have taken a number of practical steps to mitigate risk related to the staff and their safety and welfare. These have included increased staff communications, with regular check-ins to keep them informed and connected, flexible working hours that can be adapted to suit the personal circumstances of individual staff members, and reduced travel requirements. We have also made a counselling service available to all staff, encouraged regular time off and given an extra day's leave to all staff, creating a cross-organisational long weekend.

The choice and frequency of internal audit visits to country programmes are partly risk-based, with countries being added to the list where risks are deemed to have changed, for example after the start of a major new humanitarian response. All audit reports are submitted to the Finance and Audit Committee for detailed review and discussion before full Board meetings. Country audit work is currently conducted remotely due to travel restrictions.

The Trustees are of the opinion that the Charity has the appropriate risk management systems in place and is taking steps to mitigate potential risks. The annual audit programme has been revised to look into organisation risk management in relation to COVID-19.

## Going concern

The COVID 19 pandemic has impacted our income and we have adjusted our 2020/21 operational and financial plans to manage any reduction in our revenue. We have also undertaken a strategic review of our business model to ensure that any long-term impact on income can be managed. With these steps in place, the directors have not identified any material uncertainties that may cast significant doubt on the ability of HelpAge International to continue as a going concern.

## Employee involvement

Our decision-making processes include employee consultation through the line management structure, regular leadership group meetings and staff councils.

During the year most of the country and regional offices have established staff councils and representatives from each hub are now meeting the People Committee of the Board every six months to raise key matters concerning the organisation and their hubs. We communicate through team briefings and regular updates from the Chief Executive. The leadership group consists of the heads of departments and operational hubs in different regions and countries.

HelpAge has finalised its 10-year strategy that will run until 2030. The new strategy was developed through a year-long process of consultation which started in January 2019. It included extensive staff engagement through surveys, a global staff conference held in May 2019 and regular consultation with the leadership group.

A global staff survey was conducted with the support of an external firm, Agenda Consultancy, in the last quarter of 2019. The staff survey was conducted four years after the previous global survey in 2015. It contained more than 90 questions covering nine key topics: colleagues, communication, engagement, leadership, learning and development, management, performance management, reward and role. Overall feedback from staff has been encouraging with positive feedback on seven key topics, compared to the previous staff survey. The survey has also highlighted the following areas where staff would like to see improvement:

- Reward
- People development
- Staff wellbeing

These three areas have been identified as organisational priorities to work on in the coming years.

## Equal opportunities

HelpAge International is committed to the principle and practice of equal opportunities and aims to be an equal opportunities employer. Our Equal Opportunities and Dignity at Work Policy seeks to ensure that no job applicant or employee receives less favourable treatment on the grounds of gender, race, origin, disability, marital status or age (within the constraints of the retirement policy), class, colour, HIV status, personal circumstances, sexual orientation, or any other grounds that are unjustifiable in terms of equality of opportunities for all. Policies and procedures and reporting mechanisms are in place for safeguarding, whistleblowing and health and safety, and the Board monitors reports on these matters.

HelpAge does not have a legal requirement to analyse the gender pay gap as we have fewer than 250 staff in the UK. Nonetheless, we started a gender pay gap analysis more than two years ago and took a number of practical steps to reduce the gap. These steps include ensuring the recruitment process encourages women candidates to apply for posts and creating

a working environment suitable for staff with personal commitments. We have started to see some result of these steps and the pay gap has now reduced. The median gender pay gap is now 2.1 per cent, as compared to last year when it was 5 per cent.

Further work will be conducted to address gender and diversity issues within the organisation's systems and culture. We have set up a gender and diversity working group, which will explore these systematic and cultural issues in relation to gender and diversity in the coming year.

## Safeguarding

HelpAge International is committed to ensuring that the beneficiaries of our programmes, our staff, consultants and volunteers, or any other third party that comes into contact with HelpAge are protected from any kind of abuse and harassment. We have the following policies to ensure our commitment:

- Protection
- Code of conduct
- Equal opportunity and dignity at work
- Serious incident reporting (whistleblowing).

We took a number of steps during the year to improve our safeguarding framework which we will embed and review during 2020. The steps include:

- Recruitment of HR Project Manager to lead on safeguarding work
- Safeguarding Committees set up in every regional and country office
- The development of a safeguarding risk assessment tool which identifies the potential risk of harm from people, programmes and operations
- Initiated safeguarding risk assessments in different countries
- Produced safer recruitment guidelines to ensure that safeguarding is embedded in job descriptions, adverts, interview assessments and vetting
- Strengthened partnership assessments to ensure that partner organisations have safeguarding measures in place
- Mandatory training on safeguarding policies was refreshed and training delivered, starting from the London office and rolling out to all regions in 2020
- DFID-sponsored enhanced due diligence assessment was completed, with a positive outcome.

We had two suspected safeguarding incidents during the year. Both were thoroughly investigated and dealt with appropriately and reported to regulators, strategic partners and donors. The lessons learnt from these incidents have been incorporated into the safeguarding training and awareness programme, as well as into the improvement of systems and procedures related to the prevention and management of safeguarding incidents.



# 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 global network of members. Membership of HelpAge International is a formal relationship which is open to any bonafide organisation involved in issues relating to individual or population ageing. HelpAge International works with formal members of the network and other independent partner organisations at an operational level in the implementation of specific contracts.

HelpAge International operates out of four hubs: Chiang Mai, Thailand for Asia; Nairobi, Kenya for Africa; Amman, Jordan for Eurasia/Middle East; and London, the UK for global campaigns, learning and coordination. We also have a network development office for Latin America and the Caribbean in Bogotá, Colombia.

Our approach is based on a commitment to supporting and strengthening organisations that 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. We 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. The partnership model helps to strengthen the capacity of organisations working with older people, and to connect their experience with government thinking and build a global alliance of organisations working to raise the voice of older people. We also manage programmes directly, especially in conflict and emergency.

The majority of HelpAge network members work in their own countries, but we also have a group of members – HelpAge International UK (Age International), AARP, HelpAge Deutschland, HelpAge USA, HelpAge Canada and HelpAge Korea – that partner with us to improve the lives of older women and men in low- and middle-income countries. These members play a significant and growing role in raising funds and providing support for our programme activities.

## Trustees

HelpAge International has a Board of Directors who are the Trustees. The Trustees are responsible for the overall management and direction of the Charity. The Articles of Association allow for a minimum of eight and a maximum of 15 Directors, at least six of whom are nominated by the members and up to nine appointed by the Board of Directors for their particular qualifications and skills. The overall gender and geographical composition of the Board is also taken into account. The current Board consists of 14 Trustees, including six nominated by member organisations.

Trustees are appointed to serve for two terms of three years and, at the expiration of this period, may offer themselves for reappointment for a further term of three years. At the expiration of a third term, Trustees may not be reappointed. Trustees appointed before 1 October 2011 are eligible to serve for up to two terms of four years, after which they may not be reappointed. New Trustees are either nominated by members or identified with the assistance of external recruitment agencies. All prospective candidates are interviewed by members of the Governance Committee and recommendations placed before the Board for consideration and a vote. Once appointed, new Trustees undertake a comprehensive induction programme, meeting key staff throughout the organisation.

Trustees are actively involved in supporting and promoting HelpAge International in many different ways. The Board of Trustees meets twice a year and is supported by six permanent sub-committees: Executive, Finance and Audit, Governance, Peoples', Resource Development and Ageing Policy.

These sub-committees meet at least twice a year and provide specialist support in between meetings as needed.

## Fundraising

HelpAge International does not raise funds in the United Kingdom from the public. Age International does raise funds in the UK which form part of its strategic grant to HelpAge International.

## Reserves policy

The Trustees have adopted a reserves policy that they consider appropriate to ensure the continued ability of the Charity to meet its objectives. The policy was reviewed at a Board meeting in April 2017, taking into account risks of loss of income and unplanned costs. The reserves policy has been revised in line with a reduced operational footprint and reduced income projection. The Trustees agreed on unrestricted reserve to be in the range of £1.7 to £2.3 million.

At 31 March 2020, the level of the unrestricted general fund, before pension provision, was £1.75 million (2019: £1.77 million). The policy is due for renewal in the coming year.

A designated fund of £258,000 (2019: £279,000) is for board-approved specific work that spans more than one financial year.

At 31 March 2020, the Charity held total funds of £5.9 million (2019: £6.4 million) of which £166,000 (2019: £159,000) was tied up in restricted fixed assets.

Restricted funds of £4.4 million (2019: £5 million) fall outside the reserves policy as the Trustees have no discretion over how these are spent. Restricted funds are carried forward into the current year to carry out our donors' specific requirements. They include funding received in advance to finance ongoing programmes planned for current and future years.

## Pensions

HelpAge International is a participating employer in the Help the Aged final salary pension scheme. The Scheme was closed to new members from 31 July 2002 and 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.

In accordance with Financial Reporting Standard 102, HelpAge International has obtained an actuarial

valuation for the Help the Aged defined benefit scheme and recognised a pension liability of £686,000 (2019: £752,000) 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 31 March 2019.

HelpAge International was a participating employer in the Pensions Trust Growth Plan Series 2, 3, and 4. HelpAge International withdrew from the Growth Plan with effect from 30 June 2014 and all employees previously on the Growth Plan were moved to the Pensions Trust Flexible Retirement Plan. All existing employees who have opted for a pension scheme now participate in the Pensions Trust Flexible Retirement Plan.

## Public benefit statement

HelpAge International has developed its aims and strategic plans to ensure that we provide public benefit and achieve the objectives set out in our governing document. The Trustees have referred to the guidance contained in the Charity Commission's general guidance on public benefit when reviewing the Charity's aims and objectives and in planning its future activities.

# Trustee and staff remuneration

## Trustee remuneration

Trustees do not receive remuneration in their position as Trustees, or for any services rendered to HelpAge International. They are reimbursed for travel, accommodation and incidental expenses when attending Board meetings and other meetings or programmes on behalf of HelpAge International.

## Staff remuneration

This year HelpAge International employed 438 staff on average around the world. Around 12.3 per cent of our staff are employed in our London office, with an additional 4.8 per cent of staff appointed in and paid from the UK while living and working in another country. Salaries and benefits for the rest of our staff, who make up the great majority of our global staff, are set in the countries where they work. A variety of factors are taken into consideration when setting terms and conditions, including national employment laws, cost of living considerations, and salary benchmarking against other charities.

The Board oversees the terms and conditions of employment for the Chief Executive Officer and

Executive Director team. The Executive Directors set the salaries for other senior managers and the rest of our London-based staff, using a system of job evaluations and 'pay bands'. Salaries are included in job advertisements for the great majority of our UK-based and UK-appointed positions. Every few years, HelpAge International conducts a benchmarking exercise to compare our salaries with those of others in the sector. As a UK charity, we report in our annual accounts the number of staff paid more than £60,000, and their salary levels, in bands as per statutory requirements.

The Board of HelpAge International aims to pay staff at rates that are comparable to the second quartile or median rate in the development and humanitarian sector. No bonuses or other financial incentives are offered to staff at any level. Our highest-to-lowest pay ratio in our London office for staff on our salary structure is 4:1, which is considered low for the UK charity sector. Care is taken, however, to set pay at levels that allow the Board to have confidence that suitably talented and experienced candidates will apply for and remain in senior positions that come with considerable responsibility and complexity.



We have an Equal Opportunities and Dignity at Work Policy in place, which was revised in early 2016. HelpAge International has a strong commitment to promoting equal opportunity for all staff, and for providing them with working conditions where they can pursue their careers free from discrimination or harassment of any kind. We have introduced flexible working practices to encourage potential candidates

to join the staff of HelpAge International and work flexibly if they have care or other personal responsibilities.

The Board is confident that the opportunity to advance the rights of older women and men is the primary motivation for HelpAge International's most senior staff, in common with colleagues at other levels.

## Statement of the responsibilities of the trustees

The Trustees (who are also Directors of HelpAge International for the purposes of company law) are responsible for preparing the report of the Trustees, including the strategic report and the financial statements, in accordance with applicable law and UK Accounting Standards (the United Kingdom Generally Accepted Accounting Practice).

Company law requires Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charitable company and of the incoming resources and application of resources, including the 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 apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgements and estimates that are reasonable and prudent;
- State whether applicable UK Accounting Standards 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 proper accounting records that 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.

As far as the Trustees are aware:

- There is no relevant audit information of which the charitable company's auditors are unaware; and
- Trustees have taken all required steps to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

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 member of the charity guarantees 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 as of 31 March 2020 was 14 (2019:14). 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

Haysmacintyre LLP, Chartered Accountants and Statutory Auditors has been appointed as the charitable company's auditor during the year after a thorough competitive process involving several prominent audit firms in the UK.

**The report of the Trustees, which includes the strategic report, has been approved by the Trustees and signed on their behalf by:**



David Causer  
Trustee

21 October 2020

# Independent auditor's report

## Opinion

We have audited the financial statements of HelpAge International (the 'charitable company') for the year ended 31 March 2020 which comprise the statement of financial activities, balance sheet, statement of cash flows and notes to the financial statements, including a summary of significant accounting policies. The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102 *The Financial Reporting Standard applicable in the UK and Republic of Ireland* (United Kingdom Generally Accepted Accounting Practice).

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 2020 and of the charitable company's net movement in funds, including income and expenditure, for the year then ended;
- Have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- Have been prepared in accordance with the requirements of the Companies Act 2006.

## Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the charitable company in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

## Responsibilities of trustees for the financial statements

As explained more fully in the statement of trustees' responsibilities set out in the trustees' annual report, 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, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the trustees are responsible for assessing the charitable company's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the trustees either intend to liquidate the charitable company or to cease operations, or have no realistic alternative but to do so.

## Auditor's responsibilities for the audit of the financial statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: [www.frc.org.uk/auditorsresponsibilities](http://www.frc.org.uk/auditorsresponsibilities)

This description forms part of our Auditor's report.

## Conclusions relating to going concern

We have nothing to report in respect of the following matters in relation to which the ISAs (UK) require us to report to you where:

- The trustees' use of the going concern basis of accounting in the preparation of the financial statements is not appropriate; or
- The trustees have not disclosed in the financial statements any identified material uncertainties that may cast significant doubt about the charitable company's ability to continue to adopt the going concern basis of accounting for a period of at least twelve months from the date when the financial statements are authorised for issue.

## Other information

The other information comprises the information included in the trustees' annual report, including the strategic report, other than the financial statements and our Auditor's report thereon. The trustees are responsible for the other information. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon. In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

## Opinions on other matters prescribed by the Companies Act 2006

In our opinion, based on the work undertaken in the course of the audit:

- The information given in the trustees' annual report (which includes the strategic report, and the directors' report prepared for the purposes of company law) for the financial year for which the financial statements are prepared is consistent with the financial statements; and
- The strategic report and directors' report included within the trustees' annual report, have been prepared in accordance with applicable legal requirements.

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

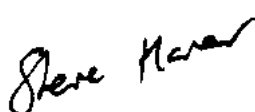
In the light of the knowledge and understanding of the charitable company and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' annual report including the strategic report.

We have nothing to report in respect of the following matters in relation to which 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.

## Use of our report

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 auditor's 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.



Steve Harper  
Senior statutory auditor

for and on behalf of  
Haysmacintyre LLP, Statutory Auditor,  
10 Queen Street Place, London EC4R 1AG

26 October 2020



## Financial statements

# Statement of financial activities

(Incorporating an income and expenditure account)

	Note	Restricted £000	Unrestricted £000	Year ended 31 March 2020 £000	Restricted £000	Unrestricted £000	Year ended 31 March 2019 £000
<b>Income</b>							
<b>Income from donations and legacies</b>							
Gifts, fees and donations	2	41	16	57	199	0	199
Donations and legacies	2	1,419	4,910	6,329	1,633	4,441	6,074
<b>Total donations and legacies</b>		1,460	4,926	6,386	1,832	4,441	6,273
Grants for international programmes	3	12,785	1,538	14,323	13,892	1,815	15,707
Investment income		1	19	20	1	15	16
<b>Total income</b>		14,246	6,483	20,729	15,725	6,271	21,996
<b>Expenditure</b>							
<b>Charitable activities</b>							
Enabling a secure income		2,377	1,844	4,221	2,852	1,090	3,942
Access to health and care services		4,704	1,662	6,366	4,936	1,973	6,909
Improving safety and security		5,363	2,176	7,539	6,279	2,379	8,658
Making older voices heard		2,415	736	3,151	1,253	569	1,822
<b>Sub-total</b>		14,859	6,418	21,277	15,320	6,011	21,331
Transfer from fixed asset fund		(7)	0	(7)	(64)	0	(64)
<b>Total expenditure</b>	4	14,852	6,418	21,270	15,256	6,011	21,267
Net (expenditure) / income for the year		(606)	65	(541)	469	260	729
Actuarial gains / (losses) on defined benefit pension scheme	16	0	57	57	0	136	136
<b>Net movement in funds</b>		(606)	122	(484)	469	396	865
<b>Reconciliation of funds</b>							
Funds at the start of the year		5,135	1,297	6,432	4,666	901	5,567
<b>Total funds carried forward including pension liability</b>		4,529	1,419	5,797	5,135	1,297	6,432
Pension liability		0	586	586	0	752	752
<b>Funds excluding pension liability</b>		4,529	2,005	6,534	5,135	2,049	7,184

All of the above results are derived from continuing activities. There were no recognised gains or losses other than those stated above.

Movements in funds are disclosed in Note 14 to the financial statements.

# Balance sheet

Company number: 1762840

	Note	31 March 2020 £000	31 March 2019 £000
<b>Fixed assets</b>			
Tangible fixed assets	9	366	309
<b>Current assets</b>			
Debtors	10	2,540	3,618
Short-term deposit		519	515
Cash at bank and in hand		4,883	4,644
		7,942	8,777
<b>Current liabilities</b>			
Creditors: amounts due within one year	11	(1,265)	(1,351)
Net current assets		6,677	7,462
<b>Total assets less current liabilities</b>			
		7,043	7,735
Provisions	12	(509)	(551)
Net assets excluding pension liability		6,534	7,184
Defined benefit pension scheme liability	16	(586)	(752)
Net assets including pension liability	13	5,948	6,432
<b>The funds of the charity</b>			
Restricted funds		4,363	4,976
Restricted fixed asset fund		166	159
Total restricted funds		4,529	5,135
<b>Unrestricted reserves</b>			
General funds		1,747	1,770
Designated funds		258	279
Total unrestricted funds excluding pension liability		2,005	2,049
Total funds excluding pension liability		6,534	7,184
Pension liability		(586)	(752)
Total charity funds	14	5,948	6,432

Approved by the trustees on 21 October 2020  
and signed on their behalf by:



David Causer  
Trustee

# Cash flow statement

		Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
	Note		
<b>Reconciliation of net expenditure to net cash flow from operating activities</b>			
<b>Cash flow from operating activities</b>			
Net income / expenditure		(541)	729
Depreciation charge	9	208	208
Decrease / (increase) in debtors	10	1,078	(166)
(Decrease) / increase in creditors	11	(86)	(504)
Disposal of tangible fixed assets	9	3	19
Transfers to provisions	12	414	116
Use of provisions	12	(456)	(109)
Investment income		(20)	(16)
<b>Defined benefit pension scheme</b>			
Impact on net incoming resources before gains and losses	16	41	78
Employer contributions paid	16	(150)	(150)
<b>Net cash provided by / (used in) operating activities</b>		<b>491</b>	<b>205</b>
<b>Cash flow from investing activities</b>			
Interest receivable		20	16
Purchase of tangible fixed assets	9	(267)	(314)
<b>Net cash provided by / (used in) investing activities</b>		<b>(247)</b>	<b>(298)</b>
<b>Change in cash and cash equivalents in the year</b>			
		<b>244</b>	<b>(93)</b>

	At 1 April 2019	Cash flows	At 31 March 2020
<b>Analysis of movement in net funds</b>			
Cash at bank and in hand	4,644	239	4,883
Short-term deposit	515	4	519
<b>Total</b>	<b>5,159</b>	<b>243</b>	<b>5,402</b>



# Notes to the financial statements

## 1. Accounting policies

### a) Basis of preparation

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (effective 1 January 2015) – (Charities SORP FRS 102), the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) August 2014 and the Companies Act 2006.

Assets and liabilities are initially recognised at historical cost or transaction value unless otherwise stated in the relevant accounting policy or note.

The accounts have been prepared on the going concern basis.

The COVID-19 pandemic has impacted our income and we adjusted our 2020/2021 operational and financial plans to manage any reductions in our revenue. We have also undertaken a strategic review of our business model to ensure that any long term impact on income can be managed. With these steps in place, the directors have not identified any material uncertainties that may cast significant doubt on the ability of HelpAge International to continue as a going concern for a period of at least 12 months from the date of approval of these financial statements.

### b) Statutory information

HelpAge International is a charitable company limited by guarantee and is incorporated in England and Wales. The registered office address is 6 Tavistock Square, London, WC1H 9NA.

### c) Fund accounting

**c.1: 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.

**c.2: Unrestricted funds** are available for use at the discretion of the Trustees in furtherance of the general objectives of the Charity and include general funds, designated funds and pension reserve as follows:

**General funds** are unrestricted funds that are available for use at the discretion of the Trustees in the furtherance of the general objectives of the Charity and which have not been designated for other purposes.

**Designated funds** comprise unrestricted funds that have been set aside by the Trustees for particular purposes. The aim and use of each designated fund is set out in the notes to the financial statement.

**c.3: Pension liability** In accordance with FRS102 – Retirement Benefits, the liability attributable to the pension schemes as set out in Note 16 is shown as a reduction of total funds. It is anticipated that these commitments will be met through future cash flows, and this is subject to regular review in conjunction with actuarial valuations and related professional advice.

### d) Public benefit entity

The charitable company meets the definition of a public benefit entity under FRS 102.

### e) 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).

### f) Income recognition

Income is recognised when the Charity has an entitlement to the funds, any performance conditions attached to the income have been met, it is probable that the income will be received and that the amount can be measured reliably.

Income from government and other grants, whether “capital” grants or “revenue” grants, is recognised when the Charity has an entitlement to the funds, any performance conditions attached to the grants have been met, it is probable that the income will be received and the amount can be measured reliably and is not deferred.

In applying this policy, HelpAge International recognises income, when grants claims are made to donors in accordance with its individual funding agreements or reporting and other contractual conditions, are met and income entitlement.

### Donation of gifts, services and facilities

Donated professional services and donated facilities are recognised as income when the Charity has control over the item or received the service, any conditions associated with the donation have been met, the receipt of economic benefit from the use by the Charity of the item is probable and that economic benefit can be measured reliably. In accordance with the Charities SORP (FRS 102), volunteer time is not recognised so refer to the Trustees’ annual report for more information about their contribution.

# 1. Accounting policies *continued*

On receipt, donated gifts, professional services and donated facilities are recognised on the basis of the value of the gift to the Charity which is the amount the Charity would have been willing to pay to obtain services or facilities of equivalent economic benefit on the open market; a corresponding amount is then recognised in expenditure in the period of receipt.

## **Interest receivable**

Interest on funds held on deposit is included when receivable and the amount can be measured reliably by the Charity; this is normally upon notification of the interest paid or payable by the bank. Bank interest is the amount receivable for the year.

## **g) Expenditure**

Resources expended are allocated to a particular activity where the cost relates directly to that activity. Resources expended include attributable VAT which cannot be recovered. 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 raising funds relate to the expenditure incurred by the Charity 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. Grants payable are made to third parties in furtherance of Charity's objects. Single or multi-year grants are accounted for when either the recipient has a reasonable expectation that they will receive a grant and the trustees have agreed to pay the grant without condition, or the recipient has a reasonable expectation that they will receive a grant and that any condition attaching to the grant is outside of the control of the Charity. Provisions for grants are made when the intention to make a grant has been communicated to the recipient but there is uncertainty about either the timing of the grant or the amount of grant payable. Grants payable are charged to the statement of financial activities in the year in which the offer is conveyed to the recipient except in those cases where the offer is conditional, such grants being recognised as expenditure when the conditions attaching are fulfilled.

## **h) Allocation of support costs**

Expenditure is allocated to a particular activity where the cost relates directly to that activity. However, the cost of overall direction and administration of each activity, comprising the salary and overhead costs of the central function, is apportioned on the basis of expenditure by different activities.

Support and governance costs are re-allocated to each of the activities on the following basis, which is an estimate, based on staff time, of the amount attributable to each activity.

Governance costs are the costs associated with the governance arrangements of the Charity. These costs are associated with constitutional and statutory requirements and include any costs associated with the strategic management of the Charity's activities.

## **i) Operating leases**

Rental charges are charged on a straight-line basis over the term of the lease.

## **j) Debtors**

Trade and other debtors are recognised at the settlement amount due after any trade discount offered. Prepayments are valued at the amount prepaid net of any trade discounts due.

## **k) Cash at bank and in hand**

Cash at bank and cash in hand includes cash and short term highly liquid investments with a short maturity of three months or less from the date of acquisition or opening of the deposit or similar account. Cash balances exclude any funds held on behalf of service users.

# 1. Accounting policies *continued*

## l) Creditors and provisions

Creditors and provisions are recognised where the Charity has a present obligation resulting from a past event that will probably result in the transfer of funds to a third-party and the amount due to settle the obligation can be measured or estimated reliably. Creditors and provisions are normally recognised at their settlement amount after allowing for any trade discounts due.

## m) Financial instruments

The Charity only has financial assets and financial liabilities of a kind that qualify as basic financial instruments. Basic financial instruments are initially recognised at transaction value and subsequently measured at their settlement value with the exception of bank loans which are subsequently measured at amortised cost using the effective interest method.

## n) 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. Where fixed assets have been revalued, any excess between the revalued amount and the historic cost of the asset will be shown as revaluation reserve in the balance sheet. The depreciation rate in use was as follows:

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

Overseas project assets are expensed in the year of purchase. However, acquisitions made on or after 1 May 2005 are included in the balance sheet and a restricted fund shows the net book value of these items. The restricted fund reflects the change in net book value during the year as a transfer for SOFA. Assets with a cost of over £250 are capitalised.

## o) Terminal benefit provision

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

## p) Pension costs

HelpAge International is a member of the Help the Aged defined benefit scheme. The amounts charged in resources expended are the current service costs and gains and losses on settlements and curtailments. They are included as part of staff costs. Past service costs are recognised immediately in the profit and loss account if the benefits have vested. If the benefits have not vested immediately, the costs are recognised over the period until vesting occurs. The interest cost and the expected return on assets are shown as a net amount of other finance costs or credits adjacent to interest. Actuarial gains and losses are recognised immediately in the other recognised gains and losses.

The Help the Aged defined benefit scheme is funded, with the assets of the Scheme held separately from those of the group, in a separate trustee-administered fund. Pension scheme assets are measured at fair value and liabilities are measured on an actuarial basis, using the projected unit method and discounted at a rate equivalent to the current rate of return on a high-quality corporate bond of equivalent currency and term to the scheme liabilities. The actuarial valuations are obtained at least triennially and are updated at each balance sheet date. The resulting defined benefit asset or liability is presented separately after other net assets on the face of the balance sheet. The interest cost and the expected return on assets are shown as a net amount of other finance costs or credits adjacent to interest.

The costs related to the defined contribution scheme (Pensions Trust Flexible Retirement Plan) are charged in expenditure on accrual-based accounting principles.



## 2. Donations and legacies

	Restricted £000	Unrestricted £000	Year ended 31 March 2020 Total £000	Restricted £000	Unrestricted £000	Year ended 31 March 2019 Total £000
<b>Core grants for international programmes:</b>						
Age International <sup>A</sup>	1,419	4,910	6,329	1,633	4,441	6,074
Membership fees	27	0	27	9	0	9
Donations	14	16	30	9	0	9
Gifts in kind	0	0	0	181	0	181
Total	41	16	57	199	0	199

	Restricted £000	Unrestricted £000	Year ended 31 March 2020 Total £000	Year ended 31 March 2019 Total £000
<b>A. Income from Age International</b>				
Strategic Funding <sup>i</sup>	252	4,840	5,092	5,200
Appeal and other restricted funds	178	0	178	352
Disasters Emergency Committee <sup>ii</sup>	989	69	1,059	522
	1,419	4,910	6,329	6,074

### i. Age International strategic funding

Age International strategic funds covered £1.5m of expenditure in countries that are considered fragile states or in countries with complex emergencies.

Strategic funding from Age International includes funds from the Sponsor a Grandparent (SAG) fundraising mechanism. The funds utilised in countries where these grandparents reside total £800,000.

	Year ended 31 March 2020 Total £000	Year ended 31 March 2019 Total £000
<b>ii. Income from Disasters Emergency Committee via Age International</b>		
Indonesia Tsunami Appeal	246	167
East Africa Crisis Response	0	33
Emergency Response for people fleeing Myanmar	0	322
Cyclone Idai Response	813	0
<b>Total Disasters Emergency Committee grants</b>	<b>1,059</b>	<b>522</b>

### 3. Income from charitable activities

#### Grants received for international programmes

	Restricted £000	Unrestricted £000	Year ended 31 March 2020 Total £000	Restricted £000	Unrestricted £000	Year ended 31 March 2019 Total £000
Age International	4,652	277	<b>4,929</b>	5,160	312	<b>5,472</b>
HelpAge Deutschland	3,426	71	<b>3,497</b>	2,867	22	<b>2,889</b>
US Agency for International Development	235	36	<b>271</b>	485	75	<b>560</b>
Sida – Swedish International Development Cooperation Agency	0	857	<b>857</b>	0	1,083	<b>1,083</b>
European Commission	424	34	<b>458</b>	1,806	120	<b>1,926</b>
Irish Aid	633	40	<b>673</b>	788	50	<b>838</b>
The Margaret A Cargill Foundation	991	103	<b>1,094</b>	289	25	<b>314</b>
Asian Development Bank	193	3	<b>196</b>	311	6	<b>317</b>
KOICA – Korea International Cooperation Agency	299	0	<b>299</b>	306	0	<b>306</b>
Other agencies (less than £300,000)	1,823	110	<b>1,933</b>	1,710	120	<b>1,830</b>
<b>Total</b>	<b>12,676</b>	<b>1,531</b>	<b>14,207</b>	<b>13,722</b>	<b>1,813</b>	<b>15,535</b>
Other income	109	7	<b>116</b>	671	78	<b>749</b>
<b>Grand total</b>	<b>12,785</b>	<b>1,538</b>	<b>14,323</b>	<b>13,892</b>	<b>1,815</b>	<b>15,707</b>

## 4a. Total expenditure

### Current year

	Staff-related costs (Note 7) £000	Programme costs £000	General office costs £000	Travel and related costs £000	Grants (Note 5) £000	Legal and professional fees £000	Fixed asset fund £000	Total £000
<b>Activities:</b>								
Enabling a secure income	1,469	1,528	62	281	860	22	0	4,221
Access to health and care services	2,873	1,542	92	243	1,566	50	0	6,367
Improving safety and security	3,108	1,983	109	331	1,949	59	0	7,539
Making older voices heard	1,496	601	45	197	788	24	0	3,150
Fixed asset fund	0	0	0	0	0	0	(7)	(7)
<b>Year ended 31 March 2020</b>	<b>8,946</b>	<b>5,654</b>	<b>308</b>	<b>1,052</b>	<b>5,164</b>	<b>154</b>	<b>(7)</b>	<b>21,270</b>

The following UK support and governance costs are allocated based on expenditure by different activities

<b>Support costs</b>	<b>1,371</b>	<b>59</b>	<b>308</b>	<b>159</b>	<b>0</b>	<b>49</b>	<b>0</b>	<b>1,946</b>
<b>Governance costs</b>	<b>74</b>	<b>0</b>	<b>0</b>	<b>48</b>	<b>0</b>	<b>17</b>	<b>0</b>	<b>139</b>

## 4b. Total expenditure

### Prior year

	Staff-related costs (Note 7) £000	Programme costs £000	General office costs £000	Travel and related costs £000	Grants (Note 5) £000	Legal and professional fees £000	Fixed asset fund £000	Total £000
<b>Activities:</b>								
Enabling a secure income	1,688	1,274	53	153	738	36	0	3,942
Access to health and care services	2,823	2,019	93	593	1,317	64	0	6,909
Improving safety and security	3,443	2,475	117	436	2,084	103	0	8,658
Making older voices heard	692	482	25	83	519	21	0	1,822
Fixed asset fund	0	0	0	0	0	0	(64)	(64)
<b>Year ended 31 March 2019</b>	<b>8,646</b>	<b>6,250</b>	<b>288</b>	<b>1,265</b>	<b>4,658</b>	<b>224</b>	<b>(64)</b>	<b>21,267</b>

The following UK support and governance costs are allocated based on expenditure by different activities

<b>Support costs</b>	<b>1,251</b>	<b>63</b>	<b>288</b>	<b>174</b>	<b>0</b>	<b>62</b>	<b>0</b>	<b>1,838</b>
<b>Governance costs</b>	<b>71</b>	<b>0</b>	<b>0</b>	<b>66</b>	<b>0</b>	<b>23</b>	<b>0</b>	<b>160</b>



## 5. Grants paid to members and partner organisations

	Number of grants	Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
Resource Integration Centre – Bangladesh	4	328	438
Young Power in Social Action – Bangladesh	4	305	372
HelpAge USA*	1	279	257
Associação de Protecção de Idoso de Tete – Mozambique	4	145	239
YAKKUM Emergency Unit – Indonesia	7	317	162
SOFLA	6	295	–
Disabled People's Development Organization – Myanmar	1	47	–
Morogoro Elderly Peoples Organisation – Tanzania	3	46	144
Kilio Cha Waathirika Na Waathiriwa Wa Ukimwi – Tanzania	2	45	–
Malawi Network of Older Persons' Organisations	5	429	116
Diocese Anglicana dos Libombos – Mozambique	2	44	–
Community Support Group – Nepal	1	43	–
Gramin Vikas Vigyan Samiti – India	3	154	93
HelpAge Deutschland	1	42	89
Community Research and Development Organisation	1	91	88
Magu Poverty Focus on Older People Rehab Centre – Tanzania	3	70	74
Ethiopian Elderly and Pensioners' National Association	3	94	67
Southern Sudan Older People's Organization	2	42	–
Makassed Hospital – Lebanon	3	50	60
AidAction Ireland	1	100	59
Aid Comilla Bangladesh	2	179	–
Associação Humanitária de Apoio à Velhice – Mozambique	1	102	52
HelpAge Vietnam	7	268	–
AMEL Association International – Lebanon	2	109	–
Uganda Reach the Aged Association – Uganda	2	41	–
Forum for Awareness and Youth Activity Nepal	3	55	44
Center for Community Development Solutions – Zimbabwe	2	49	–
Intersos – Yemen	2	52	–
ACIDEC – Mozambique	3	54	–
African Woman AIDS Working Group	1	66	–
Tesfa Social & Development Association – Ethiopia	1	66	–
Sind Rural Support Organization – Pakistan	6	71	–
ASADEC – Mozambique	2	96	–
Other small grants (less than £40,000) in 2019/20		<b>1,005</b>	<b>2,358</b>
		<b>5,178</b>	<b>4,659</b>

\* One HelpAge International trustee, Robin Talbert, is also a trustee of HelpAge USA. However, the grant to HelpAge USA is for services to raise funds for international programmes from sources in the USA. As a trustee of HelpAge USA, she is not involved in decision making related to this grant.

## 6. Net income for the year

	Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
This is stated after charging / crediting:		
Other finance income:		
Expected return on pension assets	138	140
Interest cost on pension scheme liabilities	(155)	(163)
Net other finance (loss) income from pension scheme	(17)	(23)
Depreciation	208	208
Exchange rate (loss) gain	(61)	(78)
Trustees' indemnity insurance	6	6
Trustees' expenses	30	43
(Loss) / gain on disposal of assets	(3)	(19)
<b>Auditors' remuneration (fees for Haysmacintyre / Sayer Vincent)</b>		
Annual statutory audit	17	15
Project audit for donor-funded projects	40	19
	<b>57</b>	<b>34</b>

During the period no Trustee received any remuneration. Trustees' expenses are for the reimbursement of travel, accommodation and subsistence costs for 13 Trustees' attendance (2018/19: 14 Trustees) at all meetings.

The UK office is leased from Age UK at a commercial rent of £52,288 per annum. The lease expires on 15 December 2022 and can be terminated at six months' notice.

## 7. Staff costs and numbers

	Year ended 31 March 2020 Staff	Year ended 31 March 2019 Staff
<b>a) The average number of employees on a head count basis during the year was as follows:</b>		
Network Development, Advocacy, Campaign and Communication	20	16
Global Impact and Resourcing	15	16
Chief Executive, Finance and Support Services	19	17
<b>Total staff on UK payroll based in the UK</b>	<b>54</b>	<b>49</b>
Staff on UK payroll based outside the UK	21	24
	<b>75</b>	<b>73</b>
Non-UK staff on local contracts	363	342
	<b>438</b>	<b>415</b>

	Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
<b>b) Staff costs were as follows:</b>		
UK paid staff:		
Salaries and wages	3,051	3,064
Social security costs	233	222
Pension contributions towards defined contribution scheme	212	212
	<b>3,496</b>	<b>3,498</b>
Non-UK-based national staff on local contracts	3,770	3,544
Other staff-related costs	1,680	1,604
	<b>8,946</b>	<b>8,646</b>

Other staff-related costs include staff training and workshops (£175,000), contractors (£545,000), administrative costs towards defined pension scheme (£150,000), and other non-salary costs.

	Year ended 31 March 2020	Year ended 31 March 2019
<b>c) The number of staff whose emoluments fell within each of the following bands, excluding National Insurance, were:</b>		
£60,000 – £69,999	3	2
£70,000 – £79,999	2	2
£80,000 – £89,999	1	1
£90,000 and above	1	1

Remuneration excludes employer's pension contributions of £33,219 (2018/19: £38,049) paid into pension schemes for all seven (2018/19: six) higher-paid members of staff.

The salaries and benefits, including pension contributions and employer's National Insurance contributions, of the seven Directors were £579,924 (2018/19: £584,348 for seven Directors) for the year ended 31 March 2020.



## 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

	Unrestricted assets £000	Restricted project assets £000	31 March 2020 Total assets £000
<b>Cost</b>			
At the start of the year	173	1,608	1,781
Additions	3	265	268
Disposals	–	(239)	(239)
At the end of the year	176	1,634	1,810
<b>Depreciation</b>			
At the start of the year	104	1,368	1,472
Charge for the year	27	181	208
Disposals	–	(236)	(236)
At the end of the year	131	1,313	1,444
<b>Net book value</b>			
Computers	37	109	146
Other office equipment	7	20	27
Motor vehicles	–	119	119
Fixture and fittings	1	73	74
At the end of the year	45	321	366
At the start of the year	69	240	309

## 10. Debtors

	31 March 2020 £000	31 March 2019 £000
Other debtors	142	186
Pre-payments	25	25
Accrued income	2,373	3,407
	<b>2,540</b>	<b>3,618</b>

## 11. Creditors: amounts due within one year

	31 March 2020 £000	31 March 2019 £000
Taxation and social security	58	62
Accruals	476	568
Other creditors	731	721
	<b>1,265</b>	<b>1,351</b>

## 12. Provisions

	31 March 2020 £000	31 March 2019 £000
<b>Provision for terminal benefits (reference to accounting policy in Note 1o)</b>		
At the start of the year	551	544
Charged for the year	414	116
Utilised in the year	(456)	(109)
At the end of the year	<b>509</b>	<b>551</b>

## 13. Analysis of net assets between funds

### Current year

	31 March Restricted £000	31 March Unrestricted £000	31 March Total funds £000
Tangible fixed assets	321	45	366
Net current assets less provision	4,208	1,960	6,168
Pension liability	0	(586)	(586)
<b>Net assets at the end of the year</b>	<b>4,529</b>	<b>1,419</b>	<b>5,948</b>

### Prior year

	31 March Restricted £000	31 March Unrestricted £000	31 March Total funds £000
Tangible fixed assets	240	69	309
Net current assets less provision	4,895	1,980	6,875
Pension liability	0	(752)	(752)
<b>Net assets at the end of the year</b>	<b>5,135</b>	<b>1,297</b>	<b>6,342</b>

## 14. Fund movement

### Current year

	At the start of the year £000	Income and gains £000	Expenditure and losses £000	Transfer and actuarial valuation £000	At the end of the year £000
<b>Restricted funds:</b>					
Africa	978	6,100	6,341	0	737
Asia	3,273	5,725	6,113	0	2,885
Latin America and Caribbean	14	2,120	1,990	0	144
Eurasia and Middle East	0	3	3	0	0
UK and others	711	298	412	0	597
Fixed asset fund	159	0	(7)	0	166
<b>Total restricted funds</b>	<b>5,135</b>	<b>14,246</b>	<b>14,852</b>	<b>0</b>	<b>4,529</b>
<b>Unrestricted funds:</b>					
General reserve	1,770	6,266	6,289	0	1,747
Designated reserve	279	217	238	0	258
<b>Total unrestricted funds</b>	<b>2,049</b>	<b>6,483</b>	<b>6,527</b>	<b>0</b>	<b>2,005</b>
Pension reserve	(752)	0	(109)	(57)	(586)
<b>Total funds</b>	<b>6,432</b>	<b>20,729</b>	<b>21,270</b>	<b>(57)</b>	<b>5,948</b>



## 14. Fund movement *continued*

### Prior year

	At the start of the year £000	Income and gains £000	Expenditure and losses £000	Transfer and actuarial valuation £000	At the end of the year £000
<b>Restricted funds:</b>					
Africa	765	6,563	6,350	0	978
Asia Pacific	3,015	6,173	5,915	0	3,273
Latin America and Caribbean	17	2,346	2,349	0	14
Eurasia and Middle East	0	1	1	0	0
UK and others	774	642	705	0	711
Fixed asset fund	95	0	(64)	0	159
<b>Total restricted funds</b>	<b>4,666</b>	<b>15,725</b>	<b>15,256</b>	<b>0</b>	<b>5,135</b>
<b>Unrestricted funds:</b>					
General reserve	1,769	6,050	6,049	0	1,770
Designated reserve	92	221	34	0	279
<b>Total unrestricted funds</b>	<b>1,861</b>	<b>6,271</b>	<b>6,083</b>	<b>0</b>	<b>2,049</b>
Pension reserve	(960)	0	(72)	(136)	(752)
<b>Total funds</b>	<b>5,567</b>	<b>21,996</b>	<b>21,267</b>	<b>(136)</b>	<b>6,432</b>

### Purposes of restricted funds and unrestricted funds

The Charity has various funds for which it is responsible and which require separate disclosure, which are as follows:

**Restricted funds:** Income where the donor specifies the purposes within the overall aims of the organisation. Restricted funds will generally be utilised during the next financial year on agreed programme activities according to contracts with different donors.

**Fixed asset fund:** The fixed asset fund represents the net book value of assets held overseas that were 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.

#### Unrestricted funds

**General reserve:** Unrestricted 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 to finance working capital.

**Designated reserve:** Unrestricted funds which are expendable at the discretion of the Trustees in furtherance of the specific purpose for which they have been designated. Total of £258,000 designated in 2019/20 (£280,000 in 2018/19) for Sponsor a Grandparent related work in India, HR and safeguarding initiatives, and equipment to facilitate flexible working.

## 15. Grant income

Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
--	--

### Strategic grants for international programmes

Age International	6,329	6,074
Sida – Swedish International Development Cooperation Agency	857	1,083
	<b>7,186</b>	<b>7,157</b>

### Other grants for international programmes

Age International	4,929	5,472
HelpAge Deutschland	3,497	2,889
European Commission	271	1,926
Irish Aid	456	827
US Agency for International Development	673	577
Asian Development Bank	1,093	317
KOICA – Korea International Cooperation Agency	299	306
The Government of the Federal Republic of Germany	195	135
Swiss Red Cross	116	106
UN Agencies	155	116
HelpAge USA	61	55
Other agencies (less than £50,000 in 2019/20)	1,475	1,190
	<b>14,207</b>	<b>14,452</b>

## 15. Grant income *continued*

### Income through Age International from the following donors:

Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
--	--

#### UK aid from the UK Government for:

Social Protection Rights Component of Hunger Safety Net Project: Kenya	–	40
Humanitarian Response – Lean season response in Food Security and Nutrition, Mozambique	312	423
Accountability Programme in Tanzania	300	200
	<b>612</b>	<b>663</b>

#### UN agencies for:

Dry Zone Sustainable Nutrition, Agriculture and Protection Project, Myanmar	(363)	719
Strengthening the Ministry of Social Welfare to Fulfil its Role in Expanding Social Protection, Myanmar	77	326
Inclusive Social Protection and Livelihoods, Myanmar	995	302
Integrated Humanitarian Response to the Needs of Older Women and Men, Bangladesh	(10)	753
Strengthening Humanitarian Preparedness and Response, Bangladesh	1,032	–
Integrated approach to strengthen services for persons with specific needs, Tanzania	–	315
Strengthening multi-faceted approach among PSN, Tanzania	139	–
UNHCR 2020 PPA – serving PSN, Tanzania	287	–
ILO Inception Program, Uganda	9	–
Emergency support in 5km zone in GCA of Don. and Luh, Ukraine	127	–
Across Generations & Gender Border Communities, Kyrgyzstan	89	–
Addressing Specific Needs of Drought affected IDPs, Ethiopia	(4)	187
Humanitarian response to WASH & Protection needs of IDP, Ethiopia	338	–
NFI support to IDPS, Ethiopia	117	–
Addressing Protection Concerns of People with Specific Needs, Lebanon	76	169
	<b>2,909</b>	<b>2,771</b>

#### Save the Children via Start Network for:

Emergency humanitarian response to the immigrant people from Angola to the DRC	–	102
Flood response in Nsanje, Blantyre and Chikwawa districts, Malawi	–	232
Inclusive flood response, Myanmar	124	–
Other contracts below £100,000	78	167
	<b>202</b>	<b>501</b>

#### Big Lottery Fund for:

Reducing poverty in Central Asia	–	51
	<b>–</b>	<b>51</b>



## 15. Grant income *continued*

Year ended 31 March 2020 £000	Year ended 31 March 2019 £000
--	--

### European Union and trust foundations for:

Scaling-up NCD interventions in South-East Asia	–	513
Other contracts below £250,000	805	973
	<b>805</b>	<b>1,486</b>

### Income from Sida – Swedish International Development Cooperation Agency for:

Strategic partnership	858	1,083
	<b>858</b>	<b>1,083</b>

### Income from Irish Aid for:

Accountability and Fulfilment for Older Persons (AFFORD)	673	838
	<b>673</b>	<b>838</b>

### Income received from HelpAge Deutschland for:

Integrated life-saving response to conflict and drought-displaced peoples and hosting communities in Borena zone, Ethiopia	394	354
Comprehensive life-saving emergency response for people with special needs among South Sudanese refugees in Gambella, Ethiopia	457	224
Leaving No-One Behind, Jordan	90	385
Improving the inclusiveness of older men and women with disabilities, Jordan	439	–
Addressing the health and livelihood needs of the returnees with focus on including OP, people with disability, women and children, Pakistan	238	671
Improving equitable protection, wellbeing and safety of persons with specific needs and neighbouring hosting villages in north-west Tanzania	634	219
Pro People, Pakistan	213	–
Other contracts less than £200,000	987	1,036
	<b>3,497</b>	<b>2,889</b>

## 16. Pensions

### Help the Aged Final Salary Scheme

#### FRS 102 disclosures for accounting period ending 31 March 2020

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 contribution for the year of £150,000 is based on the triennial actuarial valuation of the Scheme as at 31 March 2019, which includes an allowance for administration expenses and Pension Protection Fund (PPF) levies.

The Scheme assets neither include investments issued by HelpAge International nor 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 2020 £000	Value at 31 March 2019 £000
Present value of funded obligations	(6,314)	(6,534)
Fair value of Scheme assets	5,728	5,782
(Deficit) / surplus in the Scheme	(586)	(752)

#### The amounts recognised in the Statement of Financial Activities are as follows:

Current service cost	24	25
Past service cost (including curtailments)	–	30
Net interest on defined benefit liability	17	23
	41	78

The current service cost includes the cost of administration expenses and PPF levies.

#### Actuarial gains and loss

(Loss) / gain on Scheme assets	(132)	313
Gain / (loss) on Scheme liabilities	189	(177)
Net accumulated gain / (loss) recognised in the other comprehensive income	57	136

## 16. Pensions

### Help the Aged Final Salary Scheme *continued*

#### Reconciliation of present value of Scheme liabilities and assets

	Value at 31 March 2020 £000	Value at 31 March 2019 £000
<b>Change in the present value of the defined benefit obligation</b>		
Opening defined benefit obligation	6,534	6,356
Interest cost	155	163
Actuarial (losses) / gains on Scheme liabilities	(189)	177
Benefits paid (including expenses)	(186)	(192)
Past service costs (including curtailments)	–	30
Closing defined benefit obligation	6,314	6,534

	Value at 31 March 2020 £000	Value at 31 March 2019 £000
<b>Change in the fair value of Scheme assets</b>		
Opening fair value of Scheme assets	5,782	5,396
Expected return on Scheme assets	138	140
Actuarial (losses) / gains	(132)	313
Employer contributions	150	150
Benefits paid (including expenses)	(186)	(192)
Administrative costs incurred	(24)	(25)
Closing fair value of Scheme assets	5,728	5,782

	At 31 March 2020 %	At 31 March 2019 %
<b>Assets in the Scheme as a percentage of total Scheme assets</b>		
Matching assets including Gifts and Bonds	63.0	52
Equities	16.4	21
Diversified growth	19.1	26
Cash	1.5	0.7

	2020 £000	2019 £000
<b>Actual return on Scheme assets</b>		
Interest income on Scheme assets	138	140
(Losses) / gains on Scheme assets	(132)	313
	6	453



## 16. Pensions

### Help the Aged Final Salary Scheme *continued*

#### Assumptions

	At 31 March 2020 % pa	At 31 March 2019 % pa
<b>Principal actuarial assumptions at the balance sheet date</b>		
<b>Financial assumptions</b>		
Discount rate	2.20	2.40
Rate of increase in salaries	2.80	3.40
Rate of increase in payment of pre-2005 pensions (in excess of GMP)	1.80	2.40
Rate of increase in payment of post-2005 pensions (in excess of GMP)	1.80	2.40
Rate of revaluation of deferred pensions in excess of GMP	0.00	0.00
Inflation assumption (RPI)	2.80	3.40
Inflation assumption (CPI)	1.80	2.40

<b>Demographic assumptions</b>	2020	2019
Mortality	S3P Normal base tables projected by year of birth assuming future improvements in line with CMI 2019 core projections with a long-term rate of improvement of 1% pa	S2P Normal base tables projected by year of birth assuming future improvements in line with CMI 2018 core projections with a long-term rate of improvement of 1% pa
Cash commutation allowance	80% of the maximum cash allowance available upon retirement	80% of maximum cash allowance available upon retirement

Other assumptions are the same as those used in the preliminary results of the Trustees' Scheme Funding valuation as at 31st March 2019.

<b>History of experience gains and losses</b>	2020 £000	2019 £000	2018 £000	2017 £000	2016 £000
Defined benefit obligation	(6,314)	6,534	(6,356)	(6,485)	(5,452)
Scheme assets	5,728	5,782	5,396	5,293	4,692
Surplus / (deficit)	(586)	(752)	(960)	(1,192)	(760)
Experience adjustments on Scheme liabilities	–	0	0	0	94
Experience adjustments on Scheme assets	(132)	313	47	658	(69)

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

## 17. Related party transactions

There are no related party transactions during the year.

## 18. Operating lease commitments

Total future lease commitments under operating leases are as follows for each of the following periods:

	Property / office lease	
	2019/20 £000	2018/19 £000
<b>International offices</b>		
Less than one year	274	181
One to five years	240	121
Over five years	–	30
	<b>514</b>	<b>332</b>

	Property / office lease	
	2019/20 £000	2018/19 £000
<b>London office</b>		
Less than one year	52	52
One to five years	92	144
Over five years	0	0
	<b>144</b>	<b>196</b>

This figure relates to the UK office which is leased from Age UK at a commercial rent of £52,288 per annum. The lease expires on 15 December 2022 and can be terminated at six months' notice.

# 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>	1–6 Tavistock Square, London, WC1H 9NA	
<b>Trustees</b>	<p>Arun Maira (<i>Chair</i>)* <i>Age International</i></p> <p>David Causer (<i>Vice-Chair</i>) <i>Independent</i></p> <p>Ferdous Begum* <i>Bangladesh Women's Health Coalition</i></p> <p>Jose Miguel Guzman <i>Independent</i></p> <p>John Kingston <i>Independent</i></p> <p>Laura Machado <i>Independent</i></p> <p>Sola Mahoney* <i>HelpAge Kenya</i></p> <p>Mika Marumoto <i>Independent</i></p> <p>Cecilia Mbaka <i>Independent</i></p> <p>Helen Mealins <i>Independent</i></p> <p>Abla Sibai* <i>CSA Lebanon</i></p> <p>Alexandre Sidorenko <i>Independent</i></p> <p>Vappu Taipale* <i>Valli</i></p> <p>Robin Talbert* <i>HelpAge USA</i></p> <p><i>*Trustees nominated by members</i></p>	
<b>Senior staff</b>	<p>Justin Derbyshire <i>Chief Executive Officer</i></p> <p>Asif Sarwar <i>Chief Operating Officer / Company Secretary</i></p> <p>Kate Wedgwood <i>Director of Network, Advocacy, Communications and Campaigns</i></p> <p>Cherian Mathews <i>Director of Global Impact and Resourcing</i></p> <p>Eduardo Klien <i>Regional Director Asia-Pacific</i></p> <p>Prafulla Kumar Mishra <i>Regional Director Africa</i></p> <p>Chris McIvor <i>Regional Director Eurasia and the Middle East</i></p>	
<b>Bankers</b>	Barclays Bank plc, 1 Pall Mall East, London SW1Y 5AX	
<b>Solicitors</b>	Veale Wasbrough Vizards LLP, Second Floor, 3 Brindley Place, Birmingham B1 2JB	
<b>Auditors</b>	Haysmacintyre LLP, Chartered Accountants and Statutory Auditors, 10 Queen Street Place, London EC4R 1AG	



**Julio Acuña, an 82-year-old man who lives in the remote La Guajira region of Colombia, shows his thanks to HelpAge for the support package he received to help him cope in the time of COVID-19.**

## London office

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Company limited by guarantee  
Registered in England no. 1762840

## Annual report and financial statements 2019/20

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Front cover photo: Atyr, 78, pictured with her great-granddaughter Aisalkyn, 14, is a member of an intergenerational group in Jeti-Oguz village, Kyrgyzstan. Atyr became close to Aisalkyn when she taught her mathematics and physics, as she used to work as a teacher.

Photo: Chingiz Namazaliev/HelpAge International

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