

# LOCALISATIONWORKSHOP FACILITATION GUIDE



This is slide-by-slide guidance to facilitate a localisation workshop. This document must be accompanied by the localisation workshop power point, which can be found on the Localisation Learning Site on Fabo.org



## Slide 2 – WELCOME & AGENDA

On this slide introduce why you are doing this workshop (motivations, incentives, expectations, etc.) and WHAT is going to happen (introduce the programme, group work sessions, etc.)

## Slide 3 – INTRODUCTION TO LOCALISATION

The first part of the workshop will introduce the topic of localisation. It will go into the following:

- What is localisation?
- The history of localisation
- Who is local?
- The role of international intermediaries
- Global level processes (such as Charter4Change and Grand Bargain)

## Slide 4: TAKE A MOMENT TO REFLECT

One's personal understanding of localisation shape the ways localisation is worked with. Therefore, before going further, ask the participant to take a moment to reflect about 'what the word localisation means to them'.

## Slide 5: WHAT IS LOCALISATION?

Localisation means different things to different people. Therefore, there is not a "universal" definition agreed upon by all actors. However, we can agree that localisation is about changing the way the humanitarian system operates to be "as local as possible and as international as necessary."

The global NGO network ICVA, defines localisation as the

*"Process through which a diverse range of humanitarian actors are attempting, each in their own way, to ensure local and national actors are better engaged in the planning, delivery and accountability of humanitarian action, while still ensuring humanitarian needs can be met swiftly, effectively and in a principled manner"*

## Slide 6: THE HISTORY OF LOCALISATION

Localisation is often understood within the frame of the World Humanitarian Summit (WHS), which took place in Istanbul in 2016. A main highlight of the WHS was the launch of the Grand Bargain (GB). The GB is an agreement between 63 of the largest donors and humanitarian organisations committing themselves to get more means into the hands of people in need, and to improve the effectiveness and efficiency of the humanitarian action.

Parallel with the Grand Bargain, is the Charter for Change (C4C) initiative. C4C brings together 35 international NGOs Signatories working to implement 8 Commitments to address imbalances and inequality in the global humanitarian system. They are joined by more than 280 national and local NGO Endorsers.

In 2021, the Grand Bargain entered its fifth year and signatories agreed upon a renewed framework, Grand Bargain 2.0. Grand Bargain 2.0 has condensed its focus to two enabling priorities, often summarised as 'localisation' and 'quality funding'.

Even though localisation often is framed within recent time, the inclusion of local and national actors has been a topic within the humanitarian-development-peace sector for much longer. This can be seen on the timeline

#### Slide 7: WHO IS THE LOCAL?

There is no universal agreement in the humanitarian-development-peace sector about the definition of local and national actors.

Definition of 'local and non-state actors' endorsed by GB signatories:

*"Organisations engaged in relief that are headquartered and operating in their own aid recipient country and which are not affiliated to an international NGO". Note: "A local actor is not considered to be affiliated merely because it is part of a network, confederation or alliance wherein it maintains independent fundraising and governance systems"*

Local may also refer to national and sub-national state actors which are state authorities of the affected country that are engaged in relief. This includes national government agencies, authorities and institutions as well as local/sub-national government entities.

The definition of 'local actors' endorsed by the signatories has received critique from A4EP (Alliance for Empowering Partnerships) because the definition includes the national affiliates and sometimes country offices of international organisations. This creates unfair competition for home-grown organisations. Read more here: [IASC Definition – a barrier in achieving localisation Final 7 10 19.pdf \(reliefweb.int\)](#)

#### Slide 8: THE ROLE OF INTERNATIONAL INTERMEDIARIES

The [Bridging the intention gap](#) report defines an intermediary as *"where an organisation, network or mechanism acts as an intermediary between donors and local implementing organisations through provision of funding or other support. This includes international intermediaries such as the United Nations (UN) or international non-governmental organisations (INGOs), national organisations, pooled funding and network mechanisms"*

Intermediary organisations like UN agencies, INGOs, and country-based pooled funds connect donors with national and local implementing organisations to mediate bureaucratic complexities that prevent local actors from receiving funds directly. Sometimes, national NGOs also act as intermediaries but less frequently.

To illustrate the presence of intermediaries, approximately 75% of the USD 30B global humanitarian budget is channeled through UN-agencies with a large portion of the remainder going through other INGOs. Approx. 2 % of humanitarian funding is transferred directly to local and national NGOs.

Going forward, intermediaries should strive to empower and build capacity among their local and national partner organisations. This requires trust, transparency and good systems of accountability between partners

#### Slide 9:

This quote illustrates how global actors struggle with delivering on localisation:

*“As recently as 2017, 60 percent of our assistance was awarded to just 25 partners. This is because, a number of reasons, it’s largely because working with local partners, it turns out, is more difficult, time-consuming, and it’s riskier. Local partners often lack the internal accounting expertise our contracts require, or they might lack the legal counsel needed to shape their contracts, many of which can run hundreds of pages long. So, clearly this status quo, as in the percentages that illustrate this, is tough to shift. There is a lot of gravity pulling in the opposite direction. But we have got to try.”*

*Samantha Powers, Head of USAID*

#### Slide 10: GRAND BARGAIN AND CHARTER4CHANGE

As already mentioned, the Grand Bargain and the Charter4Change initiative are central to global processes on localisation. The following slides will explain what they are and how they are relevant for you.

#### Slide 11: CHARTER4CHANGE VIDEO

To get a sense of what the Charter4Change is about, we will first see this short video from the Charter4Change annual meeting in 2019:

LINK: <https://www.youtube.com/watch?v=bAPHtNyvK3c&t=13s>

#### Slide 12: CHARTER4CHANGE – LOCALISATION OF HUMANITARIAN AID

The [Charter4Change](#) (C4C) is an initiative that aims to transform the way the humanitarian system operates to enable local and national NGOs to play an increased and more prominent role in humanitarian response.

International NGOs are encouraged to play an active part in this transformation towards a more locally-driven humanitarian system by changing the way that they work to enable more locally-led response.

The C4C brings together 38 international NGOs [Signatories](#) working to implement the [8 Commitments](#). They are joined by more than 450 national and local NGO [Endorsers](#), keen to encourage their INGO partners to improve their partnership practices in order to deliver better outcomes for crisis-affected people.

TO SIGN OR ENDORSE: [charter4change-2019.pdf \(wordpress.com\)](#)

#### Slide 13: CHARTER4CHANGE COMMITMENTS

The Charter for Change includes 8 Commitments that international NGO Signatories agree to implement, to address imbalances and inequality in the global humanitarian system. The

commitments focus on issues of equality, effectiveness, transparency, representation, funding and resource recognition, and support for local capacity. The Charter4Change uniquely calls on local and international actors to partner in their work and in promoting the localisation agenda. The Charter4Change calls on organisations around the world to "stop undermining the capacity of local actors" and to engage in "robust organisational support and capacity strengthening."

See the 8 commitments in the slide.

#### Slide 14: CHARTER4CHANGE ENDORSERS – ROLES AND RESPONSIBILITIES

National and local NGOs working in partnership with international NGOs can endorse the Charter4Change. By endorsing, organisations commit to:

*"We endorse and support this Charter for Change. We will hold our international NGO partners who are signatories of this Charter to account. We are actively seeking those who are not signatories to this Charter to sign up."*

The role and responsibilities of Charter4Change Endorsers are described as:

1. Endorse and support the Charter for Change! You can endorse the Charter by clicking on 'ENDORSE' [here](#) or by writing to [admin@charter4change.org](mailto:admin@charter4change.org).
2. Participate in the C4C Endorsers discussion group where C4C endorsers share information, and discuss progress and challenges related to implementation of the Charter for Change
3. Help hold INGOs to account in their partnerships
4. Actively encourage INGOs who are not C4C signatories to sign the C4C and commit to localisation e. Identify creative ways to mobilise L/NNGOs to actively engage in the localisation and C4C process (e.g. convening country-level dialogue/webinars)
5. Advocate with signatories for the common goals of the C4C

#### Slide 15: THE CHARTER4CHANGE SIGNATORIES BY THE END OF 2019

Here is a picture showing the Charter4Change signatories by the end of 2019

#### Slide 16: CHARTER4CHANGE SIGNATORY PROGRESS REPORT 2020-2021

1. Signatories have made collective progress towards the 25% target, directing 23,3 % in 2020 of total humanitarian expenditure to local and national NGOs
2. Signatories rank commitment 5 as highest: advocacy to donors on the importance of national/local actors
3. 51 country offices reported that core funding is provided to their local and national partners, 48 country offices reported less or none support
4. A majority of country offices reported they are building strategic partnerships and supporting capacity development (especially finance systems)
5. 62 country offices (out of 106) report they have supported local partners in country to coordinate, network and advocate on locally led action

Link to report: [C4C Spotlight 2021.pdf](#)

#### Slide 17: GRAND BARGAIN & GRAND BARGAIN 2.0

The next slides will introduce the Grand Bargain and its iteration, the Grand Bargain 2.0

#### Slide 18: THE GRAND BARGAIN AND LOCALISATION

The [Grand Bargain](#) (GB) is a ground-breaking agreement, signed in 2016, providing a platform for collaboration between some of the largest donors and humanitarian organisations. 62 signatories have agreed to prioritise quality funding, quality partnerships with local actors, including women-led organisations, and on making response mechanisms more demand-driven.

The Grand Bargain was constitutive of a package of reforms – 51 commitments categorised within 10 work streams – with concrete actions for donors and aid agencies to implement. Localisation, as it came to be known, emerged from the second work stream. This work stream called upon more support and funding going directly to local and national responders. It represents a commitment to make principled humanitarian action *as local as possible and as international as necessary*.

Among other things, this workstream requires signatories to increase investment in local capacities, remove or reduce barriers that prevent partnerships between donors and local actors, and to achieve "*a global, aggregated target of at least 25 per cent of humanitarian funding to local and national responders as directly as possible.*"

The Grand Bargain 2.0 framework reflects this need to move the focus from 'Geneva to Goma' – to the operational level with and for people in need.

Read the Grand Bargain 2.0 framework endorsed by the signatories [here](#)

#### Slide 19: THE GRAND BARGAIN 2.0 AND NEXT STEPS

The Grand Bargain 2.0 has shrunk its original 51 commitments into two enabling priorities:

1. A critical mass of quality funding is reached that allows an effective and efficient response, ensuring visibility and accountability
2. Greater support is provided for the leadership, delivery and capacity of local responders and the participation of affected communities in addressing humanitarian needs.

These two enabling priorities are often summarised as 'quality funding' and 'localisation'.

At country-level, a new contribution to the Grand Bargain 2.0 is the formation of National Reference Groups. The members of these will use the global Grand Bargain framework to hold the Country Directors of donors, international NGOs and UN agencies, Humanitarian Country Teams and Humanitarian Coordinators accountable to delivering to it. It represents an attempt to proactively encourage local actors to engage with the Grand Bargain and challenge humanitarian and development actors that have traditionally held power in the sector. The National Reference Group should ideally be small (<10 people) and may include representatives of affected people, local civil society, representatives of workers and employers (social partners), engaged media, academics, national government, local government (including municipalities), non-humanitarian multilaterals and emerging donors.

The suggested process for establishing such a group would include a simple nomination process, either by existing Signatories or self-nomination by interested stakeholders, and appointment by the Humanitarian Coordinator. National Reference Groups would periodically report into the Facilitation

Group and wider Signatories via the Grand Bargain Secretariat. Meetings with National Reference Groups would be organised, as required in order to share views, exchange information and enable National Reference Groups to feed into and influence global level discussions.

While this concerns local and national actors, the future role of international intermediaries also has to change. The Grand Bargain 2.0 is inspired by this report: [Bridging the intention to action gap - the future role of intermediaries in supporting locally led humanitarian action.pdf \(interagencystandingcommittee.org\)](https://www.interagencystandingcommittee.org/publications/bridging-the-intention-to-action-gap-the-future-role-of-intermediaries-in-supporting-locally-led-humanitarian-action.pdf)

#### Slide 20: GROUP WORK – LOCALISATION AND MEANINGFUL PARTNERSHIPS

Now it is time for a group work exercise, where groups have to work together to define meaningful partnerships and identify steps to enhance localisation in your context.

This group work exercise can be found and downloaded on the Localisation Learning Site on Fabo.org

Hand out the printed process sheet for groups to fill out during group work

#### Slide 21: WRITE DOWN YOUR THOUGHTS ON THE PROCESS SHEET

This slide shows a picture of the process sheet that all groups should have to fill out during the group work

#### Slide 22: TEA BREAK

Time for a tea break before groups present their findings

#### Slide 23: PLENARY DISCUSSION – GROUP PRESENTATIONS

Welcome back from the tea break. Now each group will present their findings; their reflections on the questions and what is written down on the process sheet.

#### Slide 24: TIME FOR LUNCH

We will now have time for a lunch break. When we return, we will dig into what localisation looks like in practice, the challenges and concerns, and how to overcome these.

#### Slide 25: LOCALISATION IN PRACTICE

This second part of the workshop, will look at 'localisation in practice'

More specifically, it will go into:

- How is localisation practiced?
- What are the challenges and concerns?
- How to overcome challenges?

#### Slide 26: HOW IS LOCALISATION PRACTICED

In practice, localisation exists in many dimensions, four of which are outlined below.

**Partnerships** - Ensure partnerships with local/national civil society actors are genuine and equitable. International actors must, first of all, maintain a dialogue with local actors, allowing partnerships to be established, maintained, and fortified.

**Organisational Support & Capacity Strengthening** - Ensure local/national civil society actors are robust and able to design, manage and deliver effective people-centred humanitarian response and development programmes. This can be in one of three dimensions: technical/project related capacity strengthening, institutional/organisational capacity strengthening, and compliance related capacity strengthening.

**Financial resources & support** - Ensure local/national civil society actors have increased access to international and national funding. Funding is crucial in order for local actors to become robust and self-reliant civil society actors.

**Coordination, policy & advocacy** - local/national civil society actors have greater presence, influence, and leadership in coordination mechanisms and policy fora. Paying more attention to the role of local coordination mechanisms will allow for local actors to become more familiar with international and national-led coordination structures in their countries, ultimately allowing for stronger mobilisation.

To learn more about these, take a look at

the [2021/2022 DanChurchAid Global Localisation Framework](#) and see how one organisational approach to localisation looks.

More concretely, localisation can be practiced in the following ways:

- **Conduct Annual Partnerships Meetings**
- **A Partnership Agreement**
- **Capacity sharing and networking among partners**
- **Strategic planning and organisational development plans**
- **Two-way peer review of progress and partnership deliverables**
- **Address and prevent poaching of staff**
- **Publish the yearly direct funding to local actors**
- **Advocate with donors to work through L/NGOs/local authorities**
- **Reduce earmarking and increase multi-year and flexible funding**

#### Slide 27: WHAT ARE THE CHALLENGES AND CONCERNS

Some of the challenges to and concerns about the realisation of localising practice, are the following:

1. The aid system is becoming increasingly complex, more actors on the ground, less funding, more protracted conflict.
2. Concern over adherence to neutrality and impartiality principles in conflict contexts.
3. Dumping risk on local partners.
4. Limited capacity – accountability, reporting, financial.
5. High compliance requirements – reporting and financial.
6. Localising aid takes time and is expensive.

According to ICVA and HPG, the barriers to localisation can also be described through three parameters:

1. **Power** - Localisation commitments from international actors are often caught between the imperative to support local action and the hesitancy to forfeit the power required for that action to be realised.
2. **Control** - Many international actors seek to promote local ownership but also seek to define its parameters.

3. **Money** - The extent to which due diligence processes are required to receive funding often limits the ability of local and national actors to engage.

To read more about these three parameters click on this [link](#).

#### Slide 28: GROUP WORK – CAPACITY STRENGTHENING AND COORDINATION & ADVOCACY

It is now time for another group work exercise. Ask the participants to discuss the questions with their group:

- What are the most significant challenges / barriers to making progress on capacity strengthening/coordination & advocacy?
- What is one interesting example of a good/innovative practice to help make progress on capacity strengthening/ coordination & advocacy?
- What could be a way forward to help overcome these challenge/barriers by either individual agency in their partnerships, and/or at an inter-agency/collective level?

#### Slide 29: TEA BREAK

Time for a tea break before talking about the group work in plenary.

#### Slide 30: WRAP UP FROM GROUP WORK

Welcome back from the tea break. Each group will now present their key findings on the group work questions

#### Slide 31: WRAP UP AND GOODBYE

This workshop has now come to an end.

- Time for final reflections
- Hand out the workshop evaluation, which can be found on the the Localisation Learning Site on Fabo.org