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The PLF facilitator in the Philippines- Phillippa Keys, and in Iraq- Adil Jebur. Thank you for your superb skills at leading the PLFs by taking my guide and facilitation plan and making them your own.

Phil Lindsay as my key liaison person, and the Integral Localisation working group, for being great to work with, available and open and giving useful feedback when required.
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Executive Summary

Stemming from the 2016 World Humanitarian Summit (WHS) in Istanbul, *localisation* is now a highly discussed aspect of the humanitarian reform process.

The Integral Alliance (Integral) has produced a draft *Approach to Localisation and Statement of Intent* (DASOI) document. Between November 2019 and February 2020 five Partner Listening Forums were independently conducted in order to gain Partner perspectives on localisation. The PLFs were two-day events and used a variety of participatory methods to document Partner insights into their experience of, and hopes for, localisation.

The aim of these forums was to help develop the draft approach and statement document towards a final version and to guide the actual approach Integral will take as it engages on localisation with its Partners. In total eighty participants representing 47 local organisations contributed to PLFs in Nepal, Ethiopia, Haiti, the Philippines and Iraq.

At the heart of localisation lies power and control and this was a key theme that was raised in all five PLFs and surfaced in most sections of the two days.

Participants in all five PLFs consistently expressed, directly or indirectly, that there is still much room for improvement in most aspects of localisation within their contexts. The issues they raised were consistent with those described in the literature and no new areas were presented.

The DASOI was affirmed as a good document with some minor clarity required, including the need to explain the rationale for Integral’s focus on localisation at this time.

The importance of continuing support for capacity building was highlighted, utilising modes beyond just training, and this is also supported by the literature.

A common thread through all PLFs was that localisation needs to be seen in the context of the whole relief- recovery-rehabilitation- development spectrum.

There was a sense of anticipation and readiness from Partners for Integral to progress localisation, and to do so now.
Recommendations appear to be simple but will require a dedicated effort from Members and Partners to be achieved:

- Affirm Integral Member commitments and adherence to the Micah Network Partnership Guidelines (2019) and The Charter for Change (C4C).
- Effectively communicate with Partners the final version of Integral’s Localisation Approach and Statement of Intent.
- Support broader modes of capacity building and more of it.
- Develop a common measurement system to collect evidence for change in locally led humanitarian action at the Partner and Member levels.
- Experiment, pilot new ways, push the boundaries and communicate what you are learning internally and beyond.
- Incorporate more voices of women into the PLF data.
**Introduction**

In 2019 the Integral Alliance (Integral) produced a draft *Approach to Localisation and Statement of Intent* document which includes five commitments to localisation to guide its work in humanitarian response.

Between November 2019 and February 2020 Partner Listening Forums (PLFs) were independently facilitated in five different countries (Nepal, Ethiopia, Haiti, the Philippines, and Iraq). The intent of the PLFs was to gain local Partner understandings and perspectives on localisation in order to further develop the draft statement and to guide the approach Integral will take as it progresses localisation with its Partners. In total 80 participants from 47 local Partner organisations contributed to the PLFs. This represents approximately eight per cent of Integrals local Partner organisations. However, only 15 participants were women.

Integral Members have affirmed the following International Council of Voluntary Agencies’ (ICVA) definition of localisation:

> "Localisation is the process of having a humanitarian response owned in part or wholly by a national and/or local capacity that is embedded within, and understands the needs and socio-cultural context of, the area and people in crisis.”

Localisation has been a highly discussed aspect of the humanitarian reform process of the last few years and the term is now widespread in the humanitarian space (CHS Alliance, 2018). Stemming from the 2016 World Humanitarian Summit (WHS) in Istanbul there are three major sets of high-level commitments related to localisation:

- *The Grand Bargain*, which includes a work stream on more support and funding tools for local and national responders;
- *The Charter4Change*, an initiative of 35 INGOs focusing on improving their way of working with local and national Partners;
- *Individual commitments* by donors and humanitarian organisations made at the WHS related to local and national humanitarian actors.

(Els, 2018)

Integral has continued to be engaged in dialogue around localisation including reviewing the outcomes of the 2016 summit and the subsequent Grand Bargain. The PLFs provide important input into Integrals development of both the document and actual practice of localisation by its Members and Partners.

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Methodology

Integral contracted an independent consultant (Marty Pritchard) to design the PLFs. To begin Marty conducted a literature review (Annex One), in order to become further familiar with localisation in context and practice, and to inform the design of the PLFs. Marty reported to the Integral Localisation working group who approved the design of the PLFs.

Three of the PLFs were facilitated by Marty (Nepal, Ethiopia, Haiti) and two were conducted by two other facilitators (the Philippines and Iraq). Marty developed a guide to conduct the PLFs and inducted the other facilitators in this. Notetakers were employed in each location to enable the facilitators to be fully engaged with the process. In country, different Integral Members organised the logistics of the PLFs. The schedule of PLFs and who was involved is shown in Annex Two.

In each location up to 20 representatives of Partner organisations attended. Criteria for attendance included those with high level management or program management experience, and conversant with the humanitarian context, key actors, successes and failures of disaster responses they or their organisations have been involved in.

The first PLF was in Nepal and considered a “pilot”. Following this some minor amendments were made to the agenda for the following PLFs, including focussing on the Draft Approach and Statement of Intent (DASOI) once only and adding a “Messages to Integral” session. The agenda for the PLF in Ethiopia is attached as Annex Three which is indicative of the final four PLFs. Each PLF contained the same major sections but time spent on each differed between locations depending on numbers participating and flow on the day. PLFs involved highly participatory group activities including plenary or small group discussion, brainstorming, world-café and individual feedback.

This was a LISTENING forum so although there was structure and intent within each section, facilitators were careful not to put words or ideas into participants minds without allowing the discussion to be led by the participants.
Findings

1. Defining Localisation

All PLFs began with discussing a common understanding of the term localisation. This was an important starting point to clarify the meaning of localisation, understand that there are differing definitions and to reference our discussions around the ICVA definition. "Locally led humanitarian action" (LLHA) was the preferred term that I used during the PLFs and is mostly used throughout this report.

Across the different locations there was varying understanding and experience of the global movement or drivers of localisation. Nepal and Iraq participants seemed more aware of the higher-level global localisation agenda than those in other PLFs. One Nepalese attendee helpfully outlined the context within Nepal and suggested that Nepal may be one of the lead countries in the localisation space. The 2015 earthquake gave occasion for locally led humanitarian action, and a greater understanding of it, than perhaps is the case elsewhere.

In all locations though there was enthusiasm that the discussion around LLHA was taking place through these PLFs and anticipation as to what this may mean for their organisations and the work they do.

2. Vision

A visioning exercise led participants to dream of how LLHA could look in an ideal world. It was an exercise primarily to “set the scene” as the PLF began, but also resulted in some good insights. Participants initially considered an imaginary land where a disaster had struck and identified the key elements of effective LLHA. They were then asked to contextualise these elements and draw a picture along with a small narrative.

The most common themes expressed were the importance of the community at the centre of humanitarian action and the active involvement of, and adherence to, existing government structures, mechanisms and policy. This applied at local, regional and national levels. In some PLFs, reference to support from international agencies or donors was included.

In Kathmandu reference was made more than once to making sure to connect relief with recovery, rehabilitation and development. This was consistent with the wider discussion in most other locations. Annex Four contains some examples of the vision pictures produced.

3. Current Status

Having defined a vision of what LLHA could ideally look like, this section of the PLF moved participants back to reality and the current status of LLHA within their own contexts. It formed the majority of the discussion on day one of the PLFs.
3.1 Keep, Stop, Start

Participants considered things to keep, stop or start doing to enable or strengthen LLHA. This was done without prompting participants with any pre-conceived ideas. It was, at times, hard for some to keep referenced specifically on LLHA and not think about the broader needs for conducting effective programs or projects (although we recognised the links). The common areas that surfaced in two or more PLF are listed below with the questions that were used to prompt discussion. Further detail from each PLF is provided in Annex Five.

Keep

Question - *What aspects exist (to some degree at least) that aid/strengthen/promote LLHA and should be kept?*

Common areas identified across the PLFs were:
- Effective coordination at all levels of local organisations and government
- Good communication and information sharing on the ground and between Partners/Members
- Effective community mobilisation to respond to disasters
- Participatory approaches between Partner and communities.

Stop

Question - *What aspects exist (to some degree at least) that hinder/weaken/block LLHA and should be stopped?*

Common areas identified across the PLFs were:
- Top down approaches from donors and government, whereby Partners have no or little decision making input
- Slow responses from donors/Integral Members
- Corruption at all levels (local, national, international)
- Duplication of resources and response efforts on the ground during a disaster. This is wasteful and also leads to poor community acceptance or respect.

Start

Question - *What aspects do not exist (or are weak) that should/could be started or strengthened to enable LLHA to occur?*

Common areas identified across the PLFs were:
- Strengthening Capacity Building
- Understanding and consistent use of humanitarian standards and codes
- Improved local level planning that involves government and local organisations working together (and not done in a donor office off shore)
• Making better connections between relief and development (and the continuity of Partner relationships with the community)

Participants described the need for capacity building at both the internal organisational and response/program delivery levels. Although participants acknowledged that Integral Members facilitated various aspects of capacity building, it was generally placed in the “Start” category as there were new modes of capacity building that Partners are interested in. In Nepal and Ethiopia discussion focussed on more effective and targeted capacity building. This may involve support for mentoring and/or longer-term courses and should be focussed on pertinent and practical issues such as financial grants systems, Core Humanitarian Standards, and compliance requirements. Participants also discussed the need for support to help build capacity of their own local Partners or communities. For example, in the Philippines the discussion regarding capacity building also included training for churches. In Iraq requests for capacity building included consideration of strategy for building capacity of younger members of staff as part of succession planning whilst aiming to avoid poaching of well qualified staff by INGOs.

3.2 Aspects of partnership

Following the Keep, Stop, Start exercise participants engaged further on the following eight areas related to different aspects of partnership:

• Partnership models
• Control and decision making
• Representation
• Funding/finance
• Capacity Building
• Coordination
• Compliance and reporting
• Risk.

This was an exercise aimed to deliberately go deeper on some areas that may not have been raised or covered in depth in the Keep, Stop, Start exercise. Some questions, included in italics below each heading, were used to prompt thinking. High level summary statements that aim to capture the majority response are provided below. Indicative quotes are also given. Further detailed responses are found in Annex Six.
3.2.1 Partnership Models

*What works well/doesn’t work well? What alternatives exist?*

**Summary statement:** Where trust and autonomy are involved it is appreciated, but there is still much room for improvement.

> "International organisations tell us what to do and we execute this—it’s like an employer-employee relationship." (Haiti)

Comment was made that Integral Members often demonstrate better autonomy and trust with Partners than other donors may, however when the Member was operational this was not always the case. Discussion referred to partnerships as being top down and hierarchical and in favour of the donor organisation (or Member). Partners expressed the need for improved dialogue between them and their Members.

3.2.2 Control and Decision Making

*To what extent do you feel you have control and/or lead decision making?*

**Summary statement:** Although there is variable experience of control and decision-making, power is skewed toward the Member agency or donor.

> "In most projects we have 40% control and the Integral Member has 60%—this is too much control for Integral." (Haiti)

> "Often control by Partners exists in the name of compliance; making templates and word limits that automatically mean those without English as a first language will be disadvantaged and never able to compete with those that do." (Nepal)

At the community level Partners expressed that in general they had good ability to make decisions and control operations. However, at the higher levels, donors were described as very controlling in areas such as levels of funding, thematic areas and modes of implementation or response. Participants expressed the desire for enhanced participation in decision making with donors and government. In one PLF participants discussed the desire for pre-disaster agreements that would allow Partners to rapidly respond and would demonstrate true trust from the Member/donor.
3.2.3 Representation

To what extent are you represented fairly?

**Summary statement:** Representation by local organisations at higher levels is poor.

"Some organisations work in development and poverty, but meetings are held in fancy hotels and they drive around in SUV diplomatic cars without really consulting the locals." (Philippines)

The overall consensus from all PLFs was that local organisations have limited involvement and are not well represented at higher levels, such as cluster meetings. In one PLF (Haiti) it was suggested that clusters were essentially only effective mechanisms for international organisations, especially when new in a country and in need of learning who’s who.

When local voices are not well represented then decision making regarding funding and implementation lacks important insight. Local Partners would appreciate contributing to clusters to enable better decision making and also to develop relationships with broader networks of other humanitarian actors and potential donors. When unable to do so, Partners are acutely aware of the missed opportunities to contribute and to access additional funding opportunities.

3.2.4 Funding/Finance

What ways could funding mechanisms change? Any comments on joint or pooled funding?

**Summary statement:** More predictable funding mechanisms including funding beyond the relief phase and advance funding is appreciated.

"International organisations impose on us the amount of funding they want to provide for projects. They decide on how to distribute the funds." (Haiti)

The uncertainty of funding allocations (amounts and any restrictions) was described by Partners as difficult to manage. Donors may have large amounts for relief but the importance of funding beyond this phase and into recovery and rehabilitation was stressed. Better communication about what is or isn’t available would be appreciated. One example of working in a consortium with other Integral Partners and having joint/pooled funding was given (during Cyclone Haiyan). It was appreciated due to the much more efficient administration and reporting involved.

3.2.5 Capacity Building

What priorities would you list in this area? Other comments?

**Summary statement:** The scope of capacity building needs to broaden beyond short training courses, be better targeted, and include donor/Members capacity.
“Capacity building is not always well done as it does not always fit the needs. It should start with a needs assessment rather than an action plan.” (Haiti)

There was a definite sense from all PLFs that capacity building efforts were fairly ad hoc and lacked much planning and strategic thought. Partners stated that they felt little control in directing their capacity building needs. Partners appreciated both organisational development and specific program management capacity building inputs, but would like more say as to how these are offered, including more than just short training events. Proper organisational capacity assessments were suggested as the appropriate place to start.

3.2.6 Coordination
Who leads coordination of humanitarian action? To what extent is this effective?

**Summary statement:** Coordination between local actors happens but between national/local and international actors is either lacking or controlled by international organisations.

“At local (zone and district) levels it is highly coordinated, however between National and International NGOs there is no coordination.” (Ethiopia)

At the community level between local organisations there seemed to be a good degree of coordination described in several of the PLF locations. However, when discussing coordination with international organisations then local Partners felt that the situation was not in their favour. It was either lacking or controlled by internationals which was disempowering for them. This discussion linked in with the discussion on representation too.

3.2.7 Compliance and Reporting
To what extent are requirements in this area enabling or a barrier to locally led humanitarian action?

**Summary statement:** There is recognition of the importance of compliance and reporting but some simplification would help particularly at the time of a disaster.

“Often international organisations impose on us their own policies and procedures; the rules and reports are according to the donors will.” (Haiti)

Compliance and reporting was linked to accountability and this was acknowledged as important. In one PLF participants stated that compliance needs changed frequently and
they needed regular training to keep up with them. The compliance and reporting requirements of most donors or Members can be an additional heavy burden during an already difficult time. Some simplification of the processes and language used in templates/requirements would be appreciated.

3.2.8 Risk
What are the greatest risks for you and could this be different?

| Summary statement: Risk is much broader than fiduciary risk and includes narrow funding sources, general and political instability and exclusion from important networks. |

“Risk is often seen differently by donors compared to implementers with donors often focused only on fiduciary risk. However, NGOs have broader risk concerns including the safety of staff and safeguarding of communities.”
(Nepal)

The overriding message from all PLFs was that international donors are primarily concerned with fiduciary risk, and particularly fraud, but that this was only part of the picture. Fiduciary risk for local Partners was more focussed on the instability of their own funding sources/support from donors. Risk was also described as much broader than just financial and included organisational security, staff safety, and reputational risks. Although no direct suggestions were given as to how this area could be improved, opening up the discussion with Members and other donors would be appreciated.
3.3 Degrees of Participation

This activity indirectly further engaged participants on the issues of decision making, power and control, and partnership. It surfaced the levels of participation participants believed they generally have both with their own communities or local Partners and then with their Integral Members. The tool comes from the International Association for Public Participation but uses definitions modified to fit the context. These were presented as a spectrum of increasing participation from left to right:

Inform  Consult  Involve  Collaborate  Empower

Least

Inform:
Goal: To provide you with balanced and objective information to assist you in understanding the problem, alternatives, opportunities and/or solutions.
Promise: “We will keep you informed.”

Consult:
Goal: To obtain your feedback on analysis, alternatives and/or decisions.
Promise: “We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how your input influenced the decision.”

Involve:
Goal: To work directly with you throughout the process to ensure that your concerns and aspirations are consistently understood and considered
Promise: “We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how your input influenced the decision.”

Collaborate:
Goal: To partner with you in each aspect of the decision including the development of alternatives and the identification of the preferred solution.
Promise: “We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.”

Empower:
Goal: To place final decision making in your hands.
Promise: “We will support and/or implement what you decide.”

Most

Participants were asked to identify the definition which best matched their experience/opinion of their participation with their own communities or local Partners and then with their Integral Member(s).

When considering the degree of participation with their own communities or Partners the majority of participants in all but Iraq described their level of participation as being at Involve. When asked to consider this with the relationship to their Integral Member there was very little movement overall (i.e. most participants stayed with Involve).

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However, in the Philippines most participants rated their relationship with their Members at Collaborate or Empower, perhaps explained by the fact that most organisations referenced their long-standing relationships with their Integral Members.

In Iraq, it took some time to understand the concepts and there was a wide spread across the five levels, with about 40% rating their participation with their own communities or Partners and with their Integral Members at Empower. When the facilitator further questioned and explained that this was not an evaluation of their performance there was some degree of movement back towards the centre (Involve).

Admittedly this is a blunt tool, and there are assumptions made that the higher degrees of participation are what should be aimed for and are better than the lower degrees. The results however are suggestive that overall there is still significant room for improvement in participation and partnership between Integral Members and Partners and between Partners and their own communities and partners.

“The day we approve our own proposal is the day we are empowered”

(Nepal)

3.4 The roles of the community and international organisations
Participants were asked to consider the role of the community and of international organisations with regards to LLHA. Key aspects have been bolded in the participants responses.

3.4.1 The role of the community
What is the role of the community (in humanitarian action and the entire project cycle?)

• Working in with the district level local authorities is key. (Nepal)
• If LLHA is working well then local institutions (formal and informal organisations) actively participate and are empowered to do so. (Ethiopia)
• Communities can contribute financing in kind. (Ethiopia)
• They are vital in targeting and verifying beneficiaries and can be a good source of reliable data. (Ethiopia)
• The local community plays an important role—they are 80% of the equation. (Haiti)
• The community should be involved in all steps of the project from A to Z. (Haiti)
• They should be 100% involved. (Philippines)

3.4.2 The role of International organisations
What is the role of international organisations in large scale disasters?

• It was agreed that international organisations are necessary in large scale disasters but how different organisations approach things is variable (Nepal)
• There were mixed feelings expressed about the involvement of foreign staff on the ground during a large-scale disaster. The term “disaster tourism” was used and examples told of foreigners in the 2015 earthquake requesting visits to tourist sites and using up precious resources/vehicle needs to do so! (Nepal)

• It was suggested that the best use of international “experts” would be in review and critique of their work and proposals by dialogue, not by telling them how things should be done. (Nepal)

• They help build the capacity of local humanitarian actors (Ethiopia)

• They create long standing development and humanitarian partnerships and sustained networks (Ethiopia)

• They help local Partners in donor mapping and securing funds and provide large scale funding (Ethiopia)

• They produce and disseminate national level data and lobby the government (Ethiopia)

• The role is both positive and negative. Often they choke small local organisations, particularly when their responses last too long. (Haiti)

“We compare responses to large- and small-scale disasters to a vehicle in which the international communities play the role of fuel in the engine while the local organisations are the engine.” (Haiti)

• International organisations provide technical assistance, psychosocial support, funding, knowledge transfer and experience sharing to local communities and local organisations. (Haiti)

“When a disaster happens...we already know the context and they [Integral Member] should trust in the relationship such that we can act immediately without waiting for approvals. (Philippines)

4. Enablers/Barriers/Threats/Opportunities

During this exercise we brainstormed the Enablers, Barriers, Threats and Opportunities of/to LLHA by using the “World Café” method whereby groups move from table to table and successively add more detail to the previous groups thoughts. Enablers and Barriers are about current realities and Threats and Opportunities about potential realities.

The detailed data is presented in Annex Seven. A high-level summary of the common and key themes surfaced during all PLFs is presented in the table below:
<table>
<thead>
<tr>
<th><strong>Enablers</strong></th>
<th><strong>Barriers</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Favourable policy/practice/structures within all government levels</td>
<td>• Lack of trust from large donors/international organisations</td>
</tr>
<tr>
<td>• Adherence to high level commitments</td>
<td>• Poor coordination/communication/networking mechanisms</td>
</tr>
<tr>
<td>• Equipped and educated staff</td>
<td>• Low community and local organisation capacity</td>
</tr>
<tr>
<td>• Community aware of own capacity and responsibilities</td>
<td>• Lack of community consultation</td>
</tr>
<tr>
<td>• Genuine partnership</td>
<td>• Political agendas and negative influence of local leaders</td>
</tr>
<tr>
<td>• Effective participation at community, church and local organisation levels</td>
<td>• Lack of long-term funding commitments &amp; support for indirect costs</td>
</tr>
<tr>
<td>• Flexibility of Partners</td>
<td>• Lack of standby funds or pre-funding agreements</td>
</tr>
<tr>
<td>• Participatory program design</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Opportunities</strong></th>
<th><strong>Threats</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Policy and structures including autonomous local level bodies</td>
<td>• Political instability/divisiveness</td>
</tr>
<tr>
<td>• Communities organised to respond</td>
<td>• External aid dependency</td>
</tr>
<tr>
<td>• Volunteerism</td>
<td>• Local level power dynamics</td>
</tr>
<tr>
<td>• New modes for capacity building</td>
<td>• Competition between actors</td>
</tr>
<tr>
<td>• Better partnerships with communities and with other organisations</td>
<td>• Lack of stable funding</td>
</tr>
<tr>
<td>• Better networking opportunities</td>
<td>• Limited staff capacity and high turnover (INGO recruiting local staff)</td>
</tr>
</tbody>
</table>
5. Draft Approach and Statement of Intent (DASOI)

Participants in all locations (besides Haiti where unfortunately this did not occur) were emailed the DASOI and most had read it prior to attending the PLFs.

During the PLFs participants worked in groups to respond to the below questions. Summary points are presented based on where similar comments were made in more than one forum and which were consistent with feedback given in other sections of the forums.

What stands out to you?

- Although Integral is focussed on relief efforts, that both humanitarian and development aspects are referenced was noted and appreciated. This was a strong theme in most forums and raised as an important aspect of LLHA.
- The majority described the statements and commitments as being very clear.
- Participants expressed that this signifies a change in approach for Integral, with Integral continuing to be catalytic in what they do but “relinquishing their long-held authority”.

What is good about this draft?

- It helps understand localisation better in general and Integrals approach towards it: “Transformation not decentralisation.”
- The “Transformational...Complementary...In partnership” approach is appreciated.
- That the links between development and relief are made.
- There is a sense that Integral has the ability and intention to make this possible and that is exciting!
- There is still a focus on local- international collaboration and partnership.

What is not so good or missing?

- The strategy to achieve this is unclear or missing, including:
  - timeframes, roles and responsibilities and consequences for not fulfilling them
  - is this just being advocated for, or is this to be adopted by all Integral Members?

- Where does this fit with the longer-term vision of Integral?
- No reference to aspects of localisation that were seen as important such as the role of the corporate sector and gender. These comments came from the Nepal PLF where there is significant migratory labour and women are often heading households and significantly relied on in community reasons to disasters. The inputs and relationship to local business and markets were also seen as an important consideration in localisation in several PLF.
• The focus on local Christian Partners/church was both appreciated (Philippines & Ethiopia) and challenged (Nepal). In Nepal concerns were that principles of humanitarian practice may be contravened if Christian organisations/communities were prioritised as Partners.
• How and who determines “when capacity is not existent?” and what is the scope of capacity building- these are unclear in the document?

Other comments or queries
• There was hope expressed that what is stated in the document will be respected and actioned.
• This question was asked: How does Integral view localisation? There are 2 potential views: using local indigenous expertise and practice or using international concepts of localisation and placing them on us?
• How do Integral Partners benefit from applying localisation?
• There are some concerns in more than one PLF regarding how this effects current partnerships and funding and whether Members will still be operational, or is this an attempt for Integral to withdraw? (this links to the query regarding longer- term vision)

"If Integral no longer have much say in decisions what will interest them in moving [forward]? (Ethiopia)

Alternative Definitions of Localisation
As part of looking at the DASOI participants reviewed the ICVA definition of localisation. In some PLF revised ICVA definitions were formulated and in others only comments were made. There were also some who were happy with the ICVA definition as stands.

Three pertinent points regarding the definition, consistent with the overall discussion during all forums were:

• The definition should encompass the relief-development spectrum, not just relief
• The definition doesn’t stress the use of local resources
• The definition needs to include consideration of leadership

Two alternative definitions were offered that capture these points the best:

"Localisation is the movement and process of holistic development, including a humanitarian response, owned in part or wholly by a national and/or local capacity that is embedded within, and understands the needs and socio-cultural context of, the area and people in crisis.“ (Nepal)

and
"Localisation is the process of having a humanitarian response owned, led and managed in part or wholly by a national and/or local capacity with its internal resources and that is embedded within, understands and acts on the needs and socio-cultural, economic and political context of the area and people in crisis.” (Philippines)

6. Evidence for change

This exercise asked participants to identify what to measure to demonstrate change and/or progress in LLHA. Indicators were discussed, but were often difficult to define, and would need more thinking through. This was a fast exercise, not intended to set up a Monitoring and Evaluation framework, but as a “quick and dirty” brain storm.

The five areas that clearly came through in most of the PLFs, not in order of importance, were:

1. **Funding**: this included the percentage of country level funds allocated to local, national and international organisations and also the ability of Partners to source funds within country and internationally.

2. **Organisational Capacity**: this included ability and autonomy in managing programs and also the number of capacity building initiatives that had been engaged in.

3. **Coordination and Networking**: this considered coordination between international and local /national actors including participation in cluster systems. Coordination at the community level was also listed.

4. **Governance and Policy**: this included adherence to humanitarian standards and commitments made to the Charter for Change and Grand Bargain.

5. **Community Participation**: this included involvement of community members in all of the project cycle, including women, children, people with disabilities and other marginalised members. In some PLFs participation of the church was included.

   “To achieve [measurement of] localisation, make it simple. Too many key areas is a problem. Few is better.” (Philippines)

7. Messages to Integral

This exercise was introduced following the Nepal PLF. Participants were asked to stay focussed on localisation and write the top three messages they would like Integral to hear as it develops its approach towards localisation.
Participants overwhelmingly voiced very positive responses. Almost half of the messages conveyed a sense of excitement that Integral is progressing this agenda and there was also a sense of urgency to do so.

Some indicative quotes are shared here:

“Speed up Localisation”

“I appreciate your commitment to empower local Partners to own the humanitarian activities”

“I am happy that Integral is committed to localisation”

“We are in need of being empowered urgently”

“We hope to see the approach being endorsed”

“We are praying for the localisation approach to become a reality”

There was also some advice given on this:

“The alliance has to keep its commitment to localisation”

“Make sure that the strategies Integral use for localisation enable you to bring true localisation.”

The second most common theme in the messages was concerning capacity building, expressing thanks for it and the need for it to continue.

Perhaps much of the sentiment expressed in the messages overall could be summed up by one message from the Ethiopia PLF which used the acronym A, B, C:

“Advocate for local decision making, Build national capacity, and Support Coordination”
Reflections/Conclusions

Besides capturing the insights and experiences of participants I believe these forums conveyed a message to Partners that Integral is serious about supporting LLHA. Partners are pleased about that, and will be eagerly watching what that means for them going forward and wanting to keep Integral accountable to their commitments.

I have been encouraged by the level of engagement of participants and their genuine appreciation of both their chance to be involved in the PLFs and their partnership with Integral Members. There is an overall positive feeling from Partners towards their Integral Member(s) and this is not always the case with other donors/Partners. Many participants had never heard of Integral and are interested to know more about how being part of it can benefit their work. The networking and relationship building that occurred during the PLFs between Partners was also very much appreciated.

Participants undertook a short evaluation of the two days at the end of most PLFs. Feedback was highly positive, with the majority of participants expressing renewed inspiration to actively contribute to and strengthen LLHA within their countries. There is also a high interest amongst the majority of participants to contribute to similar forums going forward. Some expressed that two days was quite a short time to delve very deeply on the issues and in that light my reflections and conclusions are now offered.

Consistent experience across locations

What is strikingly evident is the consistent experience of Partners across the five locations. Whilst differences occur in the knowledge of the global localisation context (e.g. Grand Bargain or Charter for Change), and there are some aspects of LLHA that are being done well, all locations consistently communicated that there was still much room for improvement. The Degrees of Participation exercise was also interesting in that most Partners also rated themselves as having much room for improvement with the way they partner with their own communities or partners.

Consistent with the literature

The literature review highlighted the key areas that local and international organisations or donors have raised and are focussed on with regards to localisation. The design of the PLFs was heavily based around these key areas. However, during the PLFs there was ample opportunity for participants to describe and discuss areas or issues beyond these if relevant. Despite this there were no “surprise revelations”, and what participants have discussed as their experience is consistent with what is described within the literature.

The Sulawesi evaluation findings strengthen the PLF findings

In July 2019 Integral commissioned an independent evaluation of their response to the earthquake and tsunami in Central Sulawesi, Indonesia. This is the first large scale disaster that Integral has been involved in where the government required all efforts to be
conducted through local organisations, including where Integral Members were operational.

The evaluation included a focus on the level of localisation which based its enquiry around Integrals five localisation commitments (as per the DASOI).

The findings of this evaluation strengthen the findings of the PLFs particularly for commitments one to three:

*Act as locally as possible.* All of the response was through local Partners and the evaluation concluded that the quality and impact was increased due to the enhanced engagement and reach within communities this enabled. Pre-existing partnerships resulted in more effective outputs than if partnerships were newly formed for the response but these too produced value. The importance of partnership agreements and/or Memorandum of Understanding was highlighted. The findings of the Sulawesi evaluation add weight to recommendation one of this report. The PLFs highlight how respectful partnerships with high levels of decision making and control by Partners are asked for and appreciated.

*Capacity transfer is a two-way process.* There was a strong emphasis on capacity assessment and the inclusion of appropriate budget for capacity building into response programming. Discussion also focused on the capacity assessment of Members, in order for Partners to know Member strengths and make judgements as to who was best to partner with if needed. Transfer of capacity towards Members was described as less formal learning done by working together. The findings strengthen recommendation three of this report and highlight the need for more thought regarding capacity building of Members.

*Ensure local Partner voices are heard.* The evaluation found access to high level coordination forums at times difficult, and thus local voices lacking, and suggested that Partners may need support to attend these. Improving direct access to major donors were raised both in the evaluation and in the PLFs as something that would aid localisation.

**Power and control are at the heart of localisation**

As stated by Integral in the Draft Approach and Statement of Intent:

“*...at its heart, localisation is about ... a genuine realignment of power, enabling decision-making at a local level.*”

Directly or indirectly this sentiment was expressed throughout all of the PLFs. This is strongly supported by the literature and by participants as one of the most crucial elements of localisation.

**Affirmation of the DASOI with some clarity required**

The DASOI is generally viewed very positively and captures the approach and intent succinctly. There are only fairly minor changes suggested. This includes making reference
to other key aspects of localisation such as gender and role of the private sector (as described in section 5.0).

Participants voiced uncertainty regarding Integrals’ motives for focussing on localisation at this point in time. In several PLFs participants expressed concern as to what the relationship with its Member may look like, whether levels of funding may decrease and if partnerships may end if localisation is progressed. This needs to be clarified.

**Appropriately targeted capacity building is key**
The need for, and value of, capacity building was a strong theme through the PLFs. Capacity building to assist with better program implementation and with better organisational development were asked for. Broader modalities of capacity building are wanted and more targeted inputs required, based on proper assessment of existing capacity. The literature also affirms this. The DASOI also references this in the Statement of Intent, Commitment Two. This also recognises the two way process of capacity strengthening and this was raised in some of the PLFs.

**Relief must be seen within a development context**
Integral Partners are mostly development organisations and that is what makes them ideally suited to LLHA. PLF participants consistently raised this issue- that the whole relief-recovery-rehabilitation-development spectrum must be considered in any localisation discussion or framework. This also was raised in the literature:

"Localisation is inevitable, but it has to be undertaken carefully, under the normal circumstances and not during emergency."

**Sense of readiness**
In all PLFs, enthusiasm for progressing and strengthening localisation now was clearly evident. For many of the small organisations that partner with operational Members this was the first time they were aware of Integral and so there was also a sense of a broader interest in what else being partnered with Integral could mean, not just in terms of localisation. Aspects such as access to larger networks of similar organisations and directly linking with international organisations were possibilities mentioned.

**Different gender perspectives**
It can be argued that women are key in most communities and thus must be at the forefront of LLHA.\(^5\) Less than 20 per-cent of PLF participants were women (15/80 participants). It would be useful to ask a few questions in this area such as: Would we

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have heard different things if more women had been involved? Does this low rate of female representation reflect a broader lack of female leadership within Integral Partners, and possibly in Member modelling of leadership as well? What would that mean for Integral and for locally led humanitarian action?

Final thoughts
When Integral produces the final “Approach and Statement of Intent” document it will be just that – a document! The proof of the pudding will be in how this document is put into action. With 22 Members and over 650 local Partners Integral are well placed to push the boundaries of many aspects of localisation. There are challenges no doubt but there is a great opportunity for Integral to shine brightly in this space.

“goodwill is no longer enough and something new and concrete has to be done NOW to avoid reports in the coming years acknowledging the missed opportunity of localisation.”

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Recommendations

Acknowledging that Integral Members have a variety of perspectives and practice regarding LLHA, these recommendations aim to cut to the core of what I believe are the key practical and yet challenging actions Integral can take. Recommendations may appear to be simple but will require a dedicated effort from Members and Partners to be achieved, in the hope of strengthening genuine locally led humanitarian action.

Six recommendations are made:

1. **Recommendation One:** Affirm Integral Member commitments and adherence to the Micah Network Partnership Guidelines (2019) and The Charter for Change (C4C).

2. **Recommendation Two:** Effectively communicate with Partners the final version of Integrals Localisation Approach and Statement of Intent.

3. **Recommendation Three:** Support broader modes of capacity building and more of it.

4. **Recommendation Four:** Develop a common measurement system to collect evidence for change in locally led humanitarian action at the Partner and Member levels.

5. **Recommendation Five:** Experiment, pilot new ways, push the boundaries and communicate what you are learning internally and beyond.

6. **Recommendation Six:** Incorporate more voices of women into the PLF data.

Further more detailed descriptions are provided below.
1. **Affirm Integral Member commitments and adherence to the Micah Network Partnership Guidelines (2019) and The Charter for Change (C4C).**

   This recommendation is made in response to addressing the issues of power and control described at the heart of localisation. Partnership is key to this and the area that Integral Members have the most ability to strengthen.

   The Micah partnership guidelines are extensive, applicable and adaptable and contain many direct aspects that if adhered to would help significantly progress localisation for Integral and Partners. They are already referenced within the DASOI and should continue to be so in the final version. The guidelines acknowledge that achieving excellence in partnership is “extraordinarily difficult to achieve and sustain” but to aid progress in localisation Integral Members should throw everything at it!

   The C4C addresses the key elements of localisation described by Partners in the PLFs and in the literature. Signing this and asking Partners to endorse it is a clear commitment to localisation.

   Integral should review Member commitments to these two “frameworks” and encourage those Members who are not signatories to become so.

   A strategy to (re) communicate the Micah guidelines and endorse C4C with Partners is needed, and could be part of the same communications plan in 2. below. Both should be translated into local languages and worked through with Partners slowly and carefully to ensure understanding and to keep accountability with each other.

2. **Effectively communicate with Partners the final version of Integrals Localisation Approach and Statement of Intent.**

   Partners are very interested not only in the document but the strategy to achieve it. To effectively communicate this will require a communications plan outlining when and how to launch this. Communication needs to address:

   - The strategy: timeframes, roles and responsibilities and possibly the consequences for not fulfilling them.
   - Clarity regarding the approach: is this to be formally adopted by all Integral Members?
   - Reference to aspects of localisation that were seen as important such as the role of the corporate sector, the environment and gender.

   The above points need to be either communicated directly within the document or with direct communications with Partners by their Members. Communication needs to allay fears that this approach may mean that partnerships or funding levels are under threat.
3. **Support broader modes of capacity building and more of it.**

Capacity building is much appreciated but needs to be diversified beyond training only and led by Partner need and proper assessment of this. Other forms may include mentorships, scholarships to attend external training, academic qualifications, leadership training, learning forums and exchanges. Integral should:

- Encourage Members to review the percentage of funding allocated to capacity building and the modes that are currently engaged in
- Commit to conducting capacity building needs assessments and dialogue with Partners regarding the most effective means and modes to facilitate these needs
- Where Members have common Partners develop capacity building strategies together
- In alignment with commitment 2 in the DASOI, develop more capacity building opportunities in the Partner to Member direction.

4. **Develop a common measurement system to collect evidence for change in locally led humanitarian action at the Partner and Member levels.**

To do so, set up a small working group that includes representatives of Members and Partners that can:

- review, progress and define key areas of measurement (starting with what was described in the PLFs)
- develop meaningful indicators
- develop systems to collect and communicate the data
- periodically develop case studies as useful learning tools
- keep it simple!

5. **Experiment, pilot new ways, push the boundaries and communicate what you are learning internally and beyond.**

Look for examples and opportunities for where learning can be shared by and for Members, Partners and the wider humanitarian community. Include both successes and failures and use case studies to ground the learning. Don’t miss the opportunity!

6. **Incorporate more voices of women into the PLF data.**

Design and conduct a simple survey to gather data from a selection of female Partner staff including their opinions on the DASOI before it is finalised. This acknowledges that the PLFs were a limited sample of Partners and biased towards men’s views.
Annexes:
Annex One: Literature Review

Literature Review: Localisation

Marty Pritchard
September 2019
Introduction

Integral Alliance and Localisation

Integral is an alliance of 22 Christian international relief and development agencies (Members) which aims to see holistic transformation through providing collaborative opportunities for its Members in the areas of Disaster Response and beyond. Collectively Integral’s Members are involved in more than 100 countries, working both directly and with over 650 local Partners. Integral Members are committed to working alongside local organisations and communities to ensure that there is strong and real local ownership of the activities and their outcomes that lead to long-term positive changes. Localisation is core to Integral’s ethos, values and operating models.

Integral has drafted an Approach to localisation and statement of intent which includes five localisation commitments to guide their work in disaster response. From November 2019 to April 2020 Integral is hosting five Partner Listening Forums to gather local input to inform the development of this statement and guide Integral Member/Partner practice in the future.

Purpose

This review looks at the literature on localisation including research studies, briefing papers and agency reports.

The purpose of the literature review is two-fold; to describe the global context and drivers of the localisation agenda and to learn from on-the-ground application of localisation.

1. Global Context: Review of the global context of localisation provides a background into why Integral is attempting to strengthen its localisation approach. Understanding the global context will guide the development of and discussions held within the Partner Listening Forums.

2. Application/Learnings: To review applications of localisation and identify key learnings. More broadly these learnings, and any questions posed, could be useful to consider as Integral further frames its approach to localisation.

Defining Localisation

Integral Members have affirmed the following International Council of Voluntary Agencies’ (ICVA) definition of localisation:

“Localisation is the process of having a humanitarian response owned in part or wholly by a national and/or local capacity that is embedded within, and understands the needs and socio-cultural context of, the area and people in crisis.”

A challenge in understanding both the theory and implementation of localisation is that the definition of localisation is not consistent across the literature or in practice. Different definitions are used and may still be evolving (CHS Alliance, 2018). Some organisations interpret localisation as increasing the numbers of local staff within international organisations, while to others it is outsourcing aid delivery to local Partners and development of locally specific response models (Hedlund and Wall, 2016). The definitions differ most prominently in their emphasis on collectivism, leadership or in their understanding of context and needs.

For the purposes of this review, the ICVA definition above is used. The impacts of having varying definitions and measures are outlined in the Application Learnings section.
Global Context of Localisation

Localisation has been a highly discussed aspect of the humanitarian reform process of the last few years. The term is now widespread in the humanitarian space (CHS Alliance, 2018).

Stemming from the 2016 World Humanitarian Summit (WHS) in Istanbul there are three major sets of commitments related to localisation:

- **The Grand Bargain**, which includes a work stream on more support and funding tools for local and national responders;
- **The Charter4Change**, an initiative of 35 INGOs focusing on improving their way of working with local and national Partners;
- **Individual commitments** by donors and humanitarian organisations made at the WHS related to local and national humanitarian actors.
  
  (Els, 2018)

**Grand Bargain**

_The Grand Bargain_ originated at the global level in response to the recognition of the growing humanitarian financing gap. In 2015 a high-level panel was formed to address this gap and in 2016 the concept of the Grand Bargain was introduced. The Grand Bargain was focussed on more efficiency at the donor and implementer levels, thus freeing up human and financial resources for the direct benefit of affected populations. The original vision of the Grand Bargain was to negotiate a deal between the five largest donors and six largest UN agencies, particularly to help address the “trust deficit”. NGO representatives were then included in the negotiations and the Grand Bargain was officially launched during the World Humanitarian Summit in May 2016.

The Grand Bargain began with 10 work streams/areas with 51 associated commitments. In 2018 they were simplified into nine workstreams and 11 core commitments (Metcalf-Hough et al, 2019). The workstreams and commitments are all in some way relevant to Integral Members. They contain key principles but many are quite high level (unilateral and bilateral levels) in practice. Workstream two has a strong focus on localisation, “More support and funding tools for local and national responders”, and is considered by some as the most important of all the Grand Bargain workstreams (ICVA, 2017). The Integral draft _Approach to Localisation and Statement of Intent_ (2019) also focusses on work stream two.

Work stream two has six commitments (C1-6) across four key areas and are summarised as follows (Els, 2018):

- **Capacity strengthening**: multi-year investment in the institutional capacities of local and national responders (C1)
- **Partnership**: incorporate capacity strengthening in partnership agreements (C1), remove barriers that prevent organizations and donors from partnering with local and national responders (C2)
- **Coordination**: Support and complement national coordination mechanisms, include local and national responders in international coordination mechanisms (C3)
- **Funding**: a global, aggregated target of at least 25 per cent of humanitarian funding to local and national responders (C4), greater use of funding tools which increase and improve assistance delivered by local and national responders (C6), ‘localisation’ marker to measure direct and indirect funding to local and national responders (C5)
Charter for Change (C4C)
The C4C was initially an advocacy tool developed in the lead up to the World Humanitarian Summit’s (WHS) Global Consultation in Geneva in October 2015, and officially launched at the WHS in Istanbul in May 2016. It was led by several faith-based organisations that traditionally work with local Partners, and signatories committed themselves to improve the way they work with their local and national Partner organisations. The majority of signatories signed up to the Charter by October 2015, and most started to work on organisational change initiatives post the Istanbul WHS.

The commitments of the charter relate to:

- **Financial flows and tracking**: Commit to pass 20% of humanitarian funding to National NGOs
- **Recruitment**: Address and prevent the negative impact of recruiting NGO staff during emergencies
- **Partnerships**: Reaffirm the Principles of Partnership
- **Advocacy**: Emphasize the importance of national actors to humanitarian donors
- **Equality**: Address subcontracting and ensure equality in decision-making
- **Capacity support**: Provide robust organisational support and capacity-building
- **Communications**: Promote the role of local actors to media and public

(Els, 2018., Charter for Change, 2019)

Individual Agency Commitments
Besides the Grand Bargain and C4C signatories, various other actors made commitments related to localisation at the WHS. In total, more than 200 academic institutions, faith-based organisations, foundations, international organisations, Member states and private sector entities made commitments related to reinforcing local systems and investing in local capacities. OCHA also estimates that nearly 4000 individual WHS commitments were made by humanitarian organisations, networks and donors.

Current state
In the year following the WHS, de Geoffroy & Grunewald (2017) suggested that localisation as a concept was gaining ground and changing narratives and positions at both the international and local levels. However, it was noted that the localisation “debate” remained essentially conceptual with the majority of discussions about meeting the commitments of the Grand Bargain primarily focused on the issue of funding. These discussions were taking place at the international level, with limited engagement from local actors.

On a positive note the 2018 *Humanitarian Accountability Report* described a small but distinct sector of organisations which focus on advocating for or delivering localisation, including Local2Global, Charter4Change (C4C), the Global Mentoring Initiative and the Start Network. They also suggested that advocacy and field work from national organisations and networks was ensuring that pressure for change is coming from outside the humanitarian establishment, not just within (CHS Alliance, 2018).

The June 2019 *Grand Bargain Annual Independent report* (Metcalf-Hough et al, 2019) describes progress made in all commitments and also significant challenges to overcome. On average 68 per-cent of signatories reported actions or results against each commitment, compared to 52 per-cent in 2017.
Pleasingly, workstream two (Localisation) was in the top three best performing workstreams. Whilst the report states that efforts were made in moving this area from dialogue on definitions to actioning the commitments, specifics of this are not given.

The report also states that “the Grand Bargain has established localisation as a key normative principle of humanitarian action. While there has as yet been no system-wide shift in operational practice, the evidence indicates that the Grand Bargain has helped to drive progress, providing incentives for and facilitating sharing lessons and experiences on implementing a localisation approach.” (Metcalfe-Hough et al, 2019, p2). Again, specific examples are not described, apart from listing three countries (Bangladesh, Lebanon, Somalia) where national and local actors are showing more interest in and awareness of the Grand Bargain, and actively seeking ways to use the framework to improve international humanitarian response in these countries and negotiate a better relationship for themselves with international humanitarian actors.

Sumaylo (2017) describes 10 case studies across Africa, the Middle East and Asia of local humanitarian organisations e.g. local NGOs or Red Cross/Crescent Societies. These are examples of contexts where humanitarian action is primarily driven by local and national actors. The case studies outline barriers and enablers to the organisations work but do not specifically focus on the relationship with international actors.

The 2018 Humanitarian Accountability Report however observes that moves toward localisation were still failing to translate into much meaningful, tangible change at field level and there were numerous initiatives, varying levels of take-up within different organisations with different responses, but little in the way of coordinated, multi-agency/donor, systemic shift. An example of this may be the lack of real transformation in terms of localisation observed in the Rohingya crisis (RIAP, 2018).

The Global Mentoring Initiative (2019) also reports variable but low levels of progress, listing several key areas of concern often to do with power and decision making, roles and relationships. A similar finding is presented by Els (2018, p2) who cites “reluctance of donors, international NGOs and UN agencies to relinquish decision-making power” as one of the main obstacles to progress.

Some national and local actors have expressed that “goodwill is no longer enough and something new and concrete has to be done NOW” to avoid reports in the coming years acknowledging the “missed opportunity” of localisation” (CHS Alliance, 2018, p59).

The Sulawesi Earthquake

The response following the Sulawesi earthquake and Tsunami in Indonesia had a strong localisation focus and has been reviewed in detail providing a wealth of learning.

Following the Sulawesi earthquake and tsunami in 2018 the Government of Indonesia dictated the types and quantity of international assistance and declared that all assistance be channelled via national or local humanitarian Partners.

The Sulawesi response has provided the sector some key learning and possibly is “Charting the new norm”, but also highlights some concerns such as quality and timeliness of response (Humanitarian Advisory Group & Pujiono Centre, March 2019). One national actor stated that “localisation is inevitable, but it has to be undertaken carefully, under the normal circumstances and not during emergency” (Dutch Relief Alliance, 2019, p24).

A brief outline of the Sulawesi approach and learnings is attached as Annex 2, and key learnings incorporated within the Application/Learnings section.
Application/Learnings

This section identifies key learnings from the literature on the application of localisation that are of particular pertinence to Integral and the Partner Listening Forums. These, in many cases, identify actions that could be put in place to address the gap between commitments to localisation and the practice of localisation.

Defining and measuring localisation

The definition of localisation is not consistent across the literature or in practice. Analysis of change in localisation is made much more complex by the lack of agreement on what localisation is and what it means in practice, and by the consequent lack of widely accepted benchmarks or baseline assessments (CHS Alliance, 2018).

Three key definitions of localisation highlight the differences and similarities:

“Aid localisation is a collective process involving different stakeholders that aims to return local actors, whether civil society organisations or local public institutions, to the centre of the humanitarian system with a greater role in humanitarian response.” (de Geoffroy, V. & Grunewald, F., 2017, p4).

“...a process of recognising, respecting and strengthening the independence of leadership and decision making by national actors in humanitarian action, in order to better address the needs of affected populations.” (Ayobi,Y et al, 2017, p4).

“Localisation is the process of having a humanitarian response owned in part or wholly by a national and/or local capacity that is embedded within, and understands the needs and socio-cultural context of, the area and people in crisis.” (ICVA, in Integral, 2019, p2)

Where these definitions differ is on their change in emphasis on collectivism, leadership or understanding of context and needs.

The first two definitions appear to have an underlying assumption that the local and national actors do not have ownership/control and the focus is on international actors returning that power. The third (ICVA) definition could be seen as the end goal of localisation, with the first two as the path to get there.

Common to these three definitions is the recognition that localisation is a process. This may imply that measurement of milestones or markers within the process may be possible to achieve, even if they are likely to be different in different contexts.

Research across four Pacific Island nations involving a broad variety of stakeholders began by collectively defining localisation, and arriving at the definition above (Ayobi et al, 2017). Participants considered localisation to be a process, rather than a rapid ‘switch’ from one way of doing things to another way. They described the need for both national and international humanitarian actors to evolve and for the systems and structures they operate within to change. This suggests that humanitarian actors and contexts cannot be considered as either localised or not, but rather at different stages of a process.

Flint & Lia (2018) pose the question “Why is it important to measure localisation?” and suggest that the momentum for supporting localised humanitarian action will only last if there is evidence to show that it works. They suggest that any measurement approach needs to be flexible and adaptable enough to account for contextual differences and priorities. Several outcome and impact measurement approaches are proposed for consideration (Flint & Lia, 2018, p8):

• Include a suite of relevant and useful dimensions of measurement
• A representative mix of local, national and international stakeholders should participate in the measurement process
• Develop a balanced mix of qualitative and quantitative indicators, including objective and subjective areas of measurement
• Use of proxy indicators
• Include methods to measure largescale change over time, rather than only adherence to commitments
• Ensure approaches are simple, clear and adaptable to context

Flint et al (2018) used the Ayobi et al (2017) definition of localisation, and asked Pacific humanitarian actors from Fiji, Tonga and Vanuatu to prioritise the critical areas where change would demonstrate movement towards localisation and to develop ways to measure this. This resulted in Activity, Perception, Impact and Outcome levels being used as what they described as “signposts for change”.

Partnership Model
Partnership was a common theme throughout the literature on localisation.

The partnership model encompasses many elements such as capacity strengthening decision making/control, funding, compliance & reporting, risk and coordination. For the purposes of this review these different aspects and how they can help or hinder localisation are addressed separately below.

Regarding the partnership model itself the CHS Alliance (2018) identified the importance of moving beyond the current model of ‘partnerships’ and creating the space for local and national agencies to lead localisation. In the Christian Aid et al (2019) survey one third of respondents said other ways besides partnership would be better for improving localisation such as capacity development (without continued partnership), advocacy, technical assistance and increasing direct access to donors.

The Global Mentoring Initiative (2019) suggests that relationship is key. Addressing localisation by only increasing direct funding to national and local agencies is unhelpful. Having a genuine shared purpose, and a relationship of trust and respect is essential.

Capacity Strengthening
Flint et al (2018) identified that changes must be made in how the sector views, addresses and measures capacity. Local and national actors need and want to decide what areas of capacity are most important, how that capacity is assessed, and how it can be improved. In their research “Participants highlighted that rather than project-based support or more training, local Partners would be likely to request targeted support in areas such as financial systems, risk management and proposal development” (Flint et al, 2018, p11)

Capacity strengthening must also address the challenges of retaining staff in local NGOs who are often actively recruited by INGOs to build their own organisational capacity (Global Mentoring Initiative, 2019).

It must be noted that capacity strengthening needs vary between countries, individuals and organisations. Some desire academic qualifications, others want a wide variety of practical tools, and analytical and leadership skills in order to quickly mobilise and respond in times of disaster (Ayobi & Connors, 2016).

The RIAP charter (2018) contends that the primary obstacle to localisation is not the limitations of local capacity but is in fact the challenge for large humanitarian actors to genuinely release power and funding to national Partners.
Decision making, control and representation

Several studies identified the need for national and local Partners to have more decision-making and control (Flint, 2018., de Geoffroy & Grunewald, 2017., Action Aid, 2017).

The Global Mentoring Initiative (2019) noted that there are very few local or national parties represented at high-level coordination and decision-making groups such as at the Interagency Standing Committee. This representation is vital to enable the perspectives and needs of local agencies to be understood.

Good practice localisation must also consider all levels of participation. It’s often easy to focus at a national or local organisation level, but having local community engagement and participation is also key (Ayobi et al, 2017., Flint et al, 2018). Within the Vanuatu example there was limited evidence of changed practice in community participation when measuring progress against localisation (Humanitarian Advisory Group, 2019).

Funding

Despite moves to increase the level of direct funding to national or local Partners in line with the Grand Bargain, there is little evidence that this is changing. Action Aid (2017) reported that only 0.4 per cent of funding by the six major UN agencies was directed at local or national Partners. The Sulawesi response showed only slightly higher at 1 per cent (Humanitarian Advisory Group & Pujiono Centre, 2019).

There are three key issues raised about funding described below.

Hamsik (2019) suggests that where funding (from high level donors) is viewed as a vehicle for lowering costs (as was the original intent of the Grand Bargain), this may lead to pressure on local and national NGOs to present a low-cost operation. They may cut costs for security or put cashflow under pressure, and ultimately increase their financial risks.

International organisations and donors need to resource local agencies effectively, including multi-year funding and covering local overhead costs to ensure longevity of local and national agencies (Humanitarian Advisory Group, 2019).

The Sulawesi response raised several funding challenges for localised responses. Sulawesi local organisations found it difficult to comply with the administratively burdensome requirements of individual donors, in some cases choosing to forego international funding that had too many complex requirements and instead accepting funding that was coordinated nationally (Humanitarian Advisory Group & Pujiono Centre, 2019). The Dutch Relief Agency (2019) recommends exploring country-level pooled funding mechanisms that are accessible for national and local actors but managed nationally by skilled staff. Small local actors would then only need to manage a reduced set of the financial and administrative requirements.

Compliance and Reporting

Compliance and reporting requirements have been identified as factors creating challenges for localisation. The Sulawesi response raised the need to reduce heavy compliance requirements that are beyond the capacity of local Partners (Humanitarian Advisory Group & Pujiono Centre, 2019).

One study suggests that compliance can be addressed differently, through regular collaborative audits, instead of the police-style investigations that often occur following specific allegations or complaints. (Interaction, 2019)
Risk

Global Mentoring Initiative (2019) noted that risks can be assessed quite differently by funders and local agencies. Funders are most concerned about fiduciary risks (theft, fraud and corruption), expecting zero financial loss.

Local agencies can see risk quite differently, particular in terms of the safety of their staff when travelling and interacting with a large spectrum of people, often in dangerous areas. International staff can be seen to receive more safety precautions than local staff. The Interaction (2019) briefing paper proposes jointly assessing and prioritising risks, and from there the appropriate mitigating actions can be developed, and funded.

Hamsik (2019) states that there are inherent fiduciary risks in humanitarian work but that global donor trends are for reduced or even zero risk. This decreasing risk tolerance has an adverse effect on local Partnerships and decision-making, reducing open discussion on risk.

Coordination

Coordination meetings can have varying degrees of involvement by local and national parties inputting to and making decisions. One study cited an example of a cluster meeting where only 15 per-cent of participants were international, but they used over 50 per-cent of floor time for discussion, and led all of the decision-making processes (Ayobi et al, 2017).

Action Aid (2017) specifically call out women and women’s groups to be included in coordination networks, as they are significantly impacted parties in disasters. This involvement should be at all levels, from Strategic Advisory Groups through to national, regional and local coordination networks. They also strongly advocate for the use of local/national languages within coordination forums.

The existence of previously established consortia and networks among national and local Partners was integral in operationalising the locally-led response in Sulawesi. These networks had national, regional and local leadership, and they shaped the humanitarian coordination in this response. All Clusters were led by national or local government representatives and meetings were for the most part conducted in the national language (Bahasa), with translators used for non-Bahasa speakers as needed (Humanitarian Advisory Group & Pujiono Centre, 2019).

In summary

This review identifies principles and practices that can support or inhibit localisation. It also identifies gaps between the commitments made, and current practice

The global context shows a desire to strengthen localisation with glimpses of change, but there is still a long way to go. Some recent examples, such as the Sulawesi earthquake and tsunami response have uncovered some of the complexities in applying principles of localisation.

Barriers to localisation are strong and often complex, such as funding mechanisms, language barriers, and decision-making protocols.

Integral’s draft Approach to localisation and Statement of Intent captures commitments consistent with localisation thinking globally and addresses many of the learnings identified through recent practice. The Statement expresses a “genuine realignment of power, enabling decision-making at a local level” which is strongly supported by the literature as one of the most crucial elements of localisation.
Annex 1- Application for Partner Listening Forums:
The global context of localisation and learnings from recent applications of localisation are useful in guiding and framing the Partner Listening Forums.

General
The Forums should create an environment which fosters open and honest discussion, considering language and culture. This will be aided by having the appropriate people in attendance, who have some experience with the successes and/or challenges of localisation.

Definitions and Measurement
Start with the ICVA definition but allow a flexibility to build on it, or even challenge it. Forums should discuss what localisation means to that context, and how it would be measured. Each forum might define localisation differently, or have a different emphasis, and chose different measures.

Identify evidence that would indicate the degree of localisation, and is possible to collect by asking questions such as (Flint et al, 2018):

1. How will stakeholders know that humanitarian actors are changing practices? (Measuring process)
2. How will stakeholders know localisation has worked? (Measuring impact)

Enablers/Barriers
All of the application factors listed in this report are potential barriers or enablers to localisation and are important points for discussion at the forums. However, they are not an exhaustive list, and the facilitators should be careful to not pre-empt which factors are considered significant for localisation in each local context. Participants might identify factors that have not yet been considered by Integral or this review, but could be highly significant within their context.
Annex 2- Response to the Sulawesi earthquake and tsunami, 2018

The different approach and some key learnings have been described in by the Humanitarian Advisory Group & Pujiono Centre (2019) and the Dutch Relief Alliance (2019).

How was this response different?

What was different about this response from many other responses is highlighted in four key areas:

Leadership

There was a shift in ownership with the Government of Indonesia taking a clear and visible lead, limiting the role of international actors, which was closely followed by media. This encouraged local and national actors to lead and implement the response. There was a notable increase in the presence and voice of national and local actors in coordination forums and thus in decision making processes. International actors needed to rethink their traditional roles and “step to the side” and support Partners in mobilising and brokering funding, liaising with donors, providing technical support and strengthening capacity rather than leading on direct implementation.

Partnerships

The response was primarily through local and national partnerships with international organisations not able to operate without a local Partner. In-country Partners made strategic and operational decisions thus increasing local ownership of the response. It was noted that local NGOs were overwhelmed by international organisations wishing to Partner with them but were not always equipped to receive large amounts of donor funding, often opting out of international partnerships due to excessive financial and administrative requirements. This led to more national/local partnerships and networks being established. It is noted that national humanitarian actors assumed a role similar to international organisations and tensions came with that particularly around sub-contracting arrangements, lack of long-term capacity building and burdensome administrative and compliance requirements.

Coordination

National, regional and local leadership shaped the coordination with 100% of clusters led by national actors and predominantly held in the national language. International organisations largely supported this shift via national staff attendance and engagement at these cluster meetings. The role of international organisations in coordination was also acknowledged.

Funding

This was the area that did not reflect a shift towards more direct funding of national actors. Traditional donors channelled 67% of funds through INGOs and UN agencies and 1% to NGOs. Additionally, when local or national Partners are indirectly funded through international organisations they are not always receiving overhead costs included in budgets by international organisations. The main barrier identified to direct funding was donor compliance which was too high for local Partners to achieve. National and local organisations created alternative income streams from in-country sources.
Lessons and implications

Lessons and implications were also drawn from the response and are specific to it, but arguably applicable more broadly. They are summarised as:

National governments will increasingly place restrictions on engagement of international organisations and personnel. Surge mechanisms and deployment of international personnel will require change alongside donor support for these new models.

Equitable partnerships. Where local and national partnerships already existed, international organisations were more able to effectively support and positively influence the response. Capacity building and quality concerns may be best addressed within partnerships. International organisations and donors need to resource effective (including multi-year) partnerships and overhead costs.

Innovation. National and local actors will develop innovative ways to work around international systems if they are not made more accessible. The use of social media (primarily WhatsApp) was transformative for sharing information and enabling local and national actors to coordinate without the constraints of the cluster system. Alternative funding streams were found whereby national actors became intermediaries for local organisations.

Coordination. Regional bodies will increasingly play important coordination roles.

References


Christian Aid, CARE, Tearfund, ActionAid, CAFOD, Oxfam. (2019). Accelerating Localisation through Partnerships: Recommendations for operational practices that strengthen the leadership of national and local actors in partnership-based humanitarian action.


### Annex Two: PLF Schedule

<table>
<thead>
<tr>
<th>PLF location and hosting Member</th>
<th>Date of PLF</th>
<th>Partners present</th>
<th>Total number of participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nepal, Mission East</td>
<td>11-12 Nov, 2019</td>
<td>HEAD Nepal, WKLS, KIRDARC, Shanti Nepal, Mission East, Share &amp; Care, ETSC Nepal, CMC Nepal, NCRS, INF, UMN, Crossway Church, Tearfund, Cross Reformed Centre, NCPD</td>
<td>21 (male 19, female 2)</td>
</tr>
<tr>
<td>Ethiopia, Tearfund</td>
<td>11-12 Dec, 2020</td>
<td>EGCDWO, Tearfund, MTE-Integra, WKHC-TDA, ORDA, FSA, OICE, EKHCDC, EMWACDC, EOTC-DICAC-RRAD</td>
<td>15 (male 14, female 1)</td>
</tr>
<tr>
<td>The Philippines, Food for the Hungry</td>
<td>20-21 Jan, 2020</td>
<td>Lingap Pangkabataan, GreenMinds, SAO, Food for the Hungry PH, PCMN/PCEC, PhilRads</td>
<td>9 (5 male, 4 female)</td>
</tr>
<tr>
<td>Haiti, World Relief/Tearfund</td>
<td>28-29 Jan, 2020</td>
<td>FOKA, RIPHED, FEPH, KONBIT MASE, KONBIT FOND FRED, FCL, CEEH, MDK, ECRH, PROFOD</td>
<td>16 (13 male, 3 female)</td>
</tr>
<tr>
<td>Iraq, Zoa</td>
<td>19-20 Feb, 2020</td>
<td>CPNI, IID, EADE, CNSF, JUSTICE CENTER, EMMA, ZSVP, SAR, WAHO</td>
<td>19 (14 male, 5 female)</td>
</tr>
</tbody>
</table>
## Annex Three: PLF Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Day One</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30-8:55</td>
<td>Registration</td>
</tr>
<tr>
<td>09:00</td>
<td>Welcome and brief overview of the PLF process</td>
</tr>
<tr>
<td>09:10</td>
<td>Introductions to each other</td>
</tr>
</tbody>
</table>
| 09:35      | What is “Localisation”? Some context, terms & rationale  
  *Objective:* To briefly set the global context for localisation, define key terms and introduce the rationale for Integral’s Draft Approach to Localisation and Statement of Intent (DASOI) |
| 10:00      | Visioning  
  *Objective:* To identify a vision of what ideal locally led humanitarian action would look like, and then apply it to your own context. |
| 10:30      | Break                                    |
| 11:00      | Visioning contd.                         |
| 11:50      | Analysis of current state: Keep, Stop, Start  
  *Objective:* To elicit perspectives on the current status of locally led humanitarian action in this country |
| 12:30      | Lunch                                    |
| 1:30       | Analysis of current state continued      |
| 3:20       | Break                                    |
| 3:40       | Wrap up                                  |
| 4:00       | Close                                    |

<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Day Two</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00</td>
<td>Welcome and reflection on day one</td>
</tr>
</tbody>
</table>
| 9:15       | How to get from here to there?  
  *Objective:* To identify participants views on ways to progress and strengthen locally led humanitarian action moving forward. |
| 10:30      | Break                                    |
| 11:00      | Evidence for change  
  *Objective:* To consider appropriate ways to measure change in how locally led humanitarian action is being conducted in your context. |
| 12:00      | Review of Integral’s draft approach and statement of intent.  
  *Objective:* To critically review the approach & statement in light of the PLF journey we have been on and suggest any changes/make further observations on it. |
| 12:30      | Lunch                                    |
| 1:30       | Review of Integral’s draft approach and statement contd. |
| 2:30       | Localisation definitions                 |
| 3:00       | Break                                    |
| 3:20       | Messages to Integral                     |
| 3:40       | Evaluation & What next?                 |
| 4:00       | Close                                    |
Annex Four: Vision Pictures–some examples

Nepal:

Cooking pot: Fire wood indicates the different institutions at different partnership and capacity working together, whereby the cooking/pot stand is the pillar of accountability, stability and principles it is based on. The pot represents the cluster of a community and stuff inside it as the community/people. The vapor represents the sustainability of resilience.
Haiti:
The image is a person carrying a basket of fruit problems in the community.

- The basket represents: The action plan
- The fruits in the basket: Needs identification.
- The head: Funding resources from NGOs
- Eyes: Local organizations.
- The mouth: Dialog.
- The left arm: Local human resources in the community
- The right arm: Community leaders.
- Involvement of community leaders.
- The trunk: Local Authorities
- Left foot: Action
- Right foot: consciousness raising.

(Context where this was imagined: A Garden/Agriculture production project)
The diagram references the Philippine cultural value of 'bayanihan' which is based on an old custom where, when someone in the rural community needed to move their home made of local materials, all the community would come together to assist. The men would help carry it with the women watching and encouraging them on. When finished, the family assisted would provide some food as thanks. Everyone would do this from time to time as needed. So, during disaster times even today, people talk about the 'spirit of bayanihan', the community coming together to assist one another.
This vision picture explained:

- 110 linguistics groups, a family in house, complement action and not competition, one person is not necessarily always number one.
- Load is horizontal, equally distributed. Participatory, not individual,
- Hence, Complement, participatory, and context driven
- Labelled on Diagram L – R: Farmers/Fisherfolk; Funding Partner; Women; (Child in House); Indigenous Peoples (IP); Religious Sector; People With Disabilities (PWD)
- Need to ask house owner: "Where do you want to go? “ Ownership is important.
- Transfer/moving house – if it can’t happen the community would help them to destroy the house. You must ask the people what they want.
- Ask: What do you need? Tell us where you want to go in order to find normalcy, shalom...
## Annex Five: Keep, Stop, Start - detailed

### Keep

**Question** - *What aspects exist (to some degree at least) that aid/strengthen/promote LLHA and should be kept?*

Other specific aspects highlighted to **keep** included:

<table>
<thead>
<tr>
<th>Country</th>
<th>Aspects</th>
</tr>
</thead>
</table>
| Nepal       | - Maintaining and respecting the connection with existing government structures and systems  
             | - Use of local action plans such as Local Community Disaster Recovery Plans (LCDRP)  
             | - Networking for advocacy  
             | - Use of volunteers as part of community mobilisation in response to disasters |
| Ethiopia    | - Effective needs assessment and beneficiary identification  
             | - Trust between local and national NGOs and INGOs |
| Haiti       | - Use of a standardised needs assessment approach  
             | - Contingency planning  
             | - Coordination between Integral Members  
             | - Effective training/capacity building in emergency response/DRR and also livelihoods related development |
| The Philippines | - Use of local materials/resources for rebuilding/rehousing  
                   | - Effective resource mobilisation (including private funding from international donors for example)  
                   | - Effective training/capacity building in emergency response/DRR and also livelihoods related development |
| Iraq        | - Cluster focus meetings  
             | - The relationships with international organisations  
             | - Capacity building of local organisations and staff  
             | - Decision making abilities of local organisations  
             | - Culture of volunteerism  
             | - Partnership between universities, other organisations and the private sector  
             | - Development of written policy and procedures  
             | - Good communication with communities and their leaders and modelling this to other organisations  
             | - Gender balance in staff and in beneficiaries  
             | - Standby funds and materials stockpiled |
Question - What aspects exist (to some degree at least) that hinder/weaken/block LLHA and should be stopped?

Other specific aspects highlighted to stop included:

**Nepal**
- Procurement practices (including INGOs paying exorbitant prices) leading to price inflation or bi-passing of local vendors
- Bureaucracy from large donors and government
- Projects based on available supply and/or interests of donors rather than needs
- Low integrity in reporting (inaccurate data to make response look better and/or situation more needy)

**Ethiopia**
- Lack of recognition of local/national capacity
- The INGO/Cluster system (National and local actors are not recognised)
- “Cookie cutter” approaches instead of genuine assessment-based responses
- Dependency on external funds (“aid mentality”)
- False data from NGOs

**Haiti**
- Budgets that support large expenses in logistics/vehicles etc. but don’t prioritise other community needs
- Unqualified human resources
- Planning without community consent/projects imposed on communities
- Lack of government leadership
- Clusters led by internationals and difficult for locals to attend
- Large discrepancies between local and international salaries

**The Philippines**
- Ineffective coordination
- Oversaturation of assistance leading to dependency
- Those effected by disaster can be seen as beneficiaries only and not Partners in the program, leading to decisions being made for them and not with them i.e. donors implying they know best

**Iraq**
- Treating the foreign employee as better than the local one
- Preparing responses out of country and pressure (from international orgs) to develop projects that are not suited to the local context
- Dealing with local organisations through intermediary NGOs
- Unrealistic expectations of international organisations (e.g. deadlines for procurement or project targets)
- Governments negative view of and intervention within NGOs
Start

Question - What aspects do not exist (or are weak) that should/could be started or strengthened to enable LLHA to occur?

Other specific aspects highlighted to start (or strengthen) included:

Nepal
- Credible data base management systems

Ethiopia
- Simpler reporting requirements (stop complex reporting)
- Better ability for local resource mobilisation/fundraising
- Private sector involvement
  Pre-financing opportunities

Haiti
- Better accountability from Partner to the population
- Understanding and respecting humanitarian codes
- Better cooperation with local authorities
- Better inter-NGO coordination including a common voice for advocacy

The Philippines
- Development of emergency response manuals and guides in local languages
- Utilising the central role of the church, including maximising church facilities, improved interfaith collaboration and forming response teams

Iraq
- Advocacy & legislation for international organisations to work only through local Partners
- A certain % of country funds that must be channelled to local organisations
- Building partnerships between local organisations according to specialisation
- Use of local languages for reports
- Indirect support for overheads
- Establishing a coordination team for NNGOs
- Needs based capacity building
- Involving local organisations in planning
Annex Six: Aspects of partnership - detailed

Due to a misunderstanding this exercise was not done in Iraq. Statements have mostly been left in the words of the participants.

Partnership Models

*What works well/doesn’t work well? What alternatives exist?*

**Summary statement:** Where trust and autonomy are involved it is appreciated, but there is still much room for improvement.

- Participants in Nepal expressed appreciation regarding the autonomy and trust shown by Integral Members, noting that it was better than with some other non-Integral Partners. However, one participant commented that where a Member was operational then they were much more controlling. (Nepal)
- Partnership is top down and hierarchical. (Ethiopia)
- Two-way communication could be improved. (Ethiopia)
- Local Partners are involved but not empowered. (Ethiopia)
- Partnerships are often biased in favor of donor organisations. (Haiti)
- Participants in the Philippines expressed appreciation of long-term relationships with committed Integral Members.

Control and Decision Making

*To what extent do you feel you have control and/or lead decision making?*

**Summary statement:** Although there is variable experience of control and decision-making, power is skewed toward the Member agency or donor.

- The term “boss-ism” was used to describe the larger agencies/donors (non-Integral) who were seen as very controlling. (Nepal)
- There is some shared decision making between us and our Partners – both funding agency and government. (Ethiopia)
- As local Partners we do not make decisions or have a role in deciding the level of funding, intervention type and thematic area. (Ethiopia)
- International Partners (donors) should enhance the participation of local NGOs in the control and decision-making process. (Ethiopia)
- Local organisations have capacity to make decisions at the community level but not the higher levels. (Haiti)
- Local organisations should have control on decision making under the orientation of the government. (Haiti)
- In the Philippines discussion focused on the fact that natural disasters are inevitable and consistent and yet there is always the “send details and wait for approval”
phase that slows a response down. Pre-disaster agreements that demonstrate trust between Partner/Member would be appreciated.

**Representation**

*To what extent are you represented fairly?*

**Summary statement:** Representation by local organisations at higher levels is poor.

- At the higher (cluster) levels there is often limited involvement from local NGOs. (Nepal)
- Local NGOs are not represented at regional or federal level clusters, this is mostly done by INGOs. (Ethiopia)
- Our voices are not well represented in decisions being taken in international forums. (Haiti)
- Access to cluster meetings is difficult as a local and easy as an international even if you are new to the country. (Haiti)
- International and local organisations should get together to speak together. (Haiti)

**Funding/Finance**

*What ways could funding mechanisms change? Any comments on joint or pooled funding?*

**Summary statement:** More predictable funding mechanisms including funding beyond the relief phase and advance funding is appreciated.

- Donors can be very quick to come up with large amounts of money for relief and approve things quickly, but amounts diminish and timing of approvals all slow down for recovery and rehabilitation initiatives. Capacity building of donors is required in this area. (Nepal)
- Credit lines and revolving fund models do exist but funds always need to be spent in one financial year which can be problematic. (Nepal)
- Unpredictable funding occurs which is not timely or in the amounts needed or promised and long approval processes exist. (Ethiopia)
- Funding from international donors has been decreasing during recent years. We don’t know the reason for this decrease. Most funding is restricted and there is limited local funding available. (Haiti)
- It was helpful to have joint or pooled funding during [Cyclone] Haiyan with Integral Members working within a consortium of local NGOs. This meant having only one funding agency which made our reporting more efficient. (Philippines)
- Advance funding agreements would help. (Philippines)
**Capacity Building**

*What priorities would you list in this area? Other comments?*

**Summary statement:** The scope of capacity building needs to broaden beyond short training courses, be better targeted, and include donor/Member capacity.

- Capacity Building is required of donors as they often have no idea regarding the realities of life on the ground. (Nepal)
- Strategic organisational Capacity Building is required but not often funded. (Ethiopia)
- Support for Capacity Building is variable between different donors. (Ethiopia)
- Capacity Building only takes the form of specific training. There is no chance for nationals to find scholarships to study abroad and no sharing of expertise. (Haiti)
- *Sometimes* we have a choice in deciding what kind of capacity building will be implemented. (Haiti)
- Capacity building is not always well done as it does not always fit the needs. It should start with a needs assessment rather than an action plan. (Haiti)

**Coordination**

*Who leads coordination of humanitarian action? To what extent is this effective?*

**Summary statement:** Coordination between local actors happens but between national/local and international actors is either lacking or controlled by international organisations.

- On the ground, between local organisations there was a sense that things worked well. However, at higher level coordination meetings there is a lack of participation by local actors. (Nepal)
- At local (zone and district) levels it is highly coordinated, however between National and International NGOs there is no coordination. (Ethiopia)
- Although there is a government disaster risk prevention and preparedness commission, the coordination with NGOs is not well developed or implemented. (Ethiopia)
- Coordination is currently controlled by international organisations but should be shared between international, local authorities and local organisations. (Haiti)
- It occurs at community level with networks of organisations who share the same funding Partner. (Haiti)
- Both Local NGOs and International NGOs struggle for control and monopoly, and display territorial behaviors. (Philippines)
Compliance and Reporting
To what extent are requirements in this area enabling or a barrier to locally led humanitarian action?

Summary statement: There is recognition of the importance of compliance and reporting but some simplification would help particularly at the time of a disaster.

- During a disaster compliance and reporting should be simplified, it takes a huge amount of time to provide regular reporting (sit-reps) to donors. (Nepal)
- It is not compatible with the local context. Complicated and heavy jargon is used in reporting and should be simplified. (Ethiopia)
- We need regular training on the ever-changing donor compliance needs and how to achieve and report on these. (Ethiopia)
- Often international organisations impose on us their own policies and procedures; the rules and reports are according to the donors will. (Haiti)
- Accountability is important and compliance forces us to do things well, so it can help but it can be a lot of work on top of other things. (Philippines)

Risk
What are the greatest risks for you and could this be different?

Summary statement: Risk is much broader than fiduciary risk and includes narrow funding sources, general and political instability and exclusion from important networks.

- Due to concerns about fiduciary risks, large donors are now increasingly using private contracting companies as they are seen as less risky and more trustworthy than International NGOs and local Partners. (Nepal)
- Local humanitarian actors are not included in cluster level forums and hence they are dependent on a few donors due to a lack of exposure/relationship. (Ethiopia)
- Change of government policies means operating rules change frequently. (Ethiopia)
- Failure of funding organisations to fulfill their promises results in mistrust of our organisations by the government and the beneficiary community. (Ethiopia)
- We have poor practice and limited experience on diversifying funding sources and thus dependency on external donors. (Ethiopia)
- Instability at many levels exists and includes; Political insecurity, general insecurity, gang violence, financial insecurity and corruption. (Haiti)
- Difficult access to communities due to poor infrastructure, natural disasters and political instability means providing assistance is at risk. (Haiti)
- Poor security policy and procedures among some organisations working in high risk areas. (Philippines)
- The anti-terrorism listing of funding sources for the government makes us a potential target of the government if they consider us a threat. (Philippines)
Annex Seven: Enablers, Barriers, Threats and Opportunities

Participants were asked to reflect on both the "bigger picture" systems and people levels and also on their own organisational or partnership levels. Categorising these responses between the two levels was variable in different PLFs and I have left them as stated by participants, although there are instances where they would seem to fit the other category better. Similar or same aspects mentioned across the different forums are bolded.

### ENABLERS

<table>
<thead>
<tr>
<th>Nepal</th>
<th>Ethiopia</th>
<th>Haiti</th>
<th>The Philippines</th>
<th>Iraq</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. The things about the current systems/people/context that make locally led humanitarian action possible.</strong></td>
<td><strong>B. The things at your organisation level and your partnership with your Integral Member that make locally led humanitarian action possible.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Favourable policy/practice/structures at all levels of government (local and national) e.g. National disaster management authority</strong></td>
<td><strong>Government systems/policies</strong></td>
<td><strong>Effective needs assessments and reporting</strong></td>
<td><strong>Presence of existing local networks (advocates for localisation, DRRNet etc.)</strong></td>
<td><strong>The presence of the partnerships department in some of the international organisations</strong></td>
</tr>
<tr>
<td><strong>Global commitment to LLHA</strong></td>
<td><strong>Adherence to higher level commitments by large donors e.g. C4C/GB</strong></td>
<td><strong>Involvement of local government</strong></td>
<td><strong>Equipped &amp; educated staff</strong></td>
<td><strong>Current government laws encourage partnerships</strong></td>
</tr>
<tr>
<td><strong>Awareness within community of their own responsibilities and capacities</strong></td>
<td><strong>Effective targeting of correct beneficiary populations</strong></td>
<td><strong>Effective targeting of correct beneficiary populations</strong></td>
<td><strong>Development of local networks</strong></td>
<td><strong>The UN support localisation through alliances with local organisations</strong></td>
</tr>
<tr>
<td><strong>Improved infrastructure (roads/communications)</strong></td>
<td><strong>Responsibilities of different sectors well defined</strong></td>
<td><strong>Involvement of the media</strong></td>
<td><strong>Common needs and goals between local and international organisations to assist crises areas and exchange experiences</strong></td>
<td><strong>Common needs and goals between local and international organisations to assist crises areas and exchange experiences</strong></td>
</tr>
<tr>
<td><strong>Local level leadership emerging</strong></td>
<td><strong>Availability of resources at international level</strong></td>
<td><strong>Participatory program design</strong></td>
<td><strong>High degree of local community acceptance</strong></td>
<td><strong>High degree of local community acceptance</strong></td>
</tr>
</tbody>
</table>

*Enhanced capacity at all levels*

Internalised significance of DRR and resilience

*Strong staff* and experienced local organisations to Partner with

Shared information/accountability and monitoring between Partners

Flexibility with response modalities e.g. cash programming

**Autonomy**

**Effective participation at church, local organisation and community levels**

Trust and transparency

Good relationships between Partners

**Participatory program design**

Dialogue platforms among like-minded organisations

**Flexibility of Partners**

Genuine partnership involving joint work and capacity building

Demonstrating that local organisations can contribute financially and in kind

Professional documented organisational policies
## BARRIERS

### A. The things about the current systems/people/context that inhibit or block locally led humanitarian action.

<table>
<thead>
<tr>
<th>Nepal</th>
<th>Ethiopia</th>
<th>Haiti</th>
<th>The Philippines</th>
<th>Iraq</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lack of trust from large donors</strong></td>
<td><strong>Lack of trust between international donors / local orgs</strong></td>
<td><strong>Low capacity in community to respond well</strong></td>
<td><strong>Lack of awareness from national government</strong></td>
<td><strong>Low staff capacity – including drain of trained staff to INGOs due to higher salaries</strong></td>
</tr>
<tr>
<td>Restrictive govt. policies</td>
<td>Lack of effective networking and feedback</td>
<td>Corruption at national and international levels</td>
<td>Lack of standby funds</td>
<td><strong>Limited long-term funding commitments and support for indirect costs</strong></td>
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<tr>
<td>Poor infrastructure</td>
<td>Restrictive funding policies from international orgs</td>
<td><strong>Negative influence of local leaders</strong></td>
<td>Lack of human resources and readiness to respond</td>
<td>Weak financial systems</td>
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<tr>
<td><strong>Poor coordination mechanisms</strong></td>
<td>Civil unrest</td>
<td>Imposition of projects by donors without considering real need</td>
<td><strong>Poor coordination and communication</strong></td>
<td>Lack of strategic planning</td>
</tr>
<tr>
<td>Political agendas</td>
<td>Limited local funds available</td>
<td><strong>Government changes ways international organisations are allowed to operate in country</strong></td>
<td><strong>Consultation on the ground is lacking</strong></td>
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<td></td>
<td>General negative perception of local organisations within Ethiopia</td>
<td>Lack of information sharing from international to local orgs</td>
<td>Logistical challenge due to distances involved</td>
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<td></td>
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<td><strong>Capacity of PWD/ vulnerable sectors to tap into local or international resources</strong></td>
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### B. The things at your organisation level and your partnership with your Integral Member that inhibit or block locally led humanitarian action.

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<thead>
<tr>
<th>Nepal</th>
<th>Ethiopia</th>
<th>Haiti</th>
<th>The Philippines</th>
<th>Iraq</th>
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<tbody>
<tr>
<td><strong>Low capacity local organisations to Partner with</strong></td>
<td><strong>Low capacity of local organisations</strong></td>
<td>Communities unorganised</td>
<td><strong>Donor driven and therefore not contextually appropriate</strong></td>
<td><strong>Poor joint decision making with Partners</strong></td>
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<tr>
<td>Dependency mindset</td>
<td>Poor coordination between Member and Partner</td>
<td>Lack of funding</td>
<td><strong>Lack of dialogue with our Members regarding joint understanding of shalom and relief - development spectrum</strong></td>
<td>Less funding allocated to local organisations.</td>
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<tr>
<td></td>
<td>Internal capacity – financial systems and procedures – monitoring systems (feedback mechanism and real time data)</td>
<td></td>
<td><strong>Lack of access to standby funds</strong></td>
<td>Top heavy partnership-accept INGO/donor rules with no ability to negotiate</td>
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<td></td>
<td>Staff turnover</td>
<td></td>
<td>Delayed communication</td>
<td>The lack of communication between local organisations and donors</td>
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<td></td>
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<td>Limited networks with Integral &amp; other actors</td>
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<td>Threats</td>
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<tr>
<td><strong>A. Potential issues within systems/people/context or other that could inhibit or block locally led humanitarian action.</strong></td>
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<tr>
<td><strong>Political divisiveness; 3 levels of government; Federal, District, Local:</strong> involves unhealthy competition (policy, local power structures, politicians &amp; planners)</td>
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<td><strong>Social/cultural:</strong> Local elites, religious leaders hold power</td>
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<td>Access to isolated or remote areas is restricted</td>
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<td><strong>Heavy external assistance with strings attached</strong></td>
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<tr>
<td>Fragmented Civil Society</td>
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<td>Intermediaries (private contractors)</td>
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<td><strong>Weak coordination</strong></td>
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<tr>
<td>Limited commitment of large agencies/donors e.g. UN, EU, USAID, DFID.</td>
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<tr>
<td><strong>Funding:</strong> shift in focus from aid to investment and from CSOs to private companies, also donor fatigue</td>
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<td>Lack of internal country resources/mobilisation and thus dependency</td>
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<td><strong>Political instability/ethnic tensions</strong></td>
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<td>Lack of infrastructure (in remote areas)</td>
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<td><strong>Large donor organisations change direction</strong></td>
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<td><strong>Political instability:</strong> a. relationship between countries stop (e.g. USA and Venezuela) b. local authorities want control</td>
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<td>Civil unrest</td>
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<td>Centralisation at international and local level</td>
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<td>If professionals keep leaving communities</td>
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<td><strong>Dependency</strong> on external aid due to frequent natural disasters</td>
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<td><strong>Local leaders that have negative ideas</strong></td>
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<td><strong>Lack of standard mechanism in addressing humanitarian response among responders &amp; Local Government Units</strong></td>
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<td><strong>Limited staff capacity &amp; high turnover</strong></td>
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<td>Poor networking &amp; collaboration</td>
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<td>Organisational culture: not learning or innovative</td>
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<td><strong>If Integral Members do not keep their commitments to localisation</strong></td>
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<td><strong>Leadership capability to implement response:</strong> Inability to appropriately use the resources</td>
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<td><strong>Competition &amp; lack of coordination between Integral Partners/Members</strong></td>
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<td>Poor organisational governance</td>
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<td>Constrained on how to use funds within what was proposed</td>
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<td><strong>Ongoing transfer of experienced staff from LNGOs to INGOs</strong></td>
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<td><strong>Lack of stable/continuous funding</strong></td>
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<td><strong>The instability of the political situation</strong></td>
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<td>Bad security conditions and the thus reduced mobility to reach those in need</td>
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<td>Unhealthy view towards organisations by political and government parties</td>
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<td>Bureaucracy and lack of transparency</td>
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<td>Lack of stability in currency exchange rate</td>
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# OPPORTUNITIES

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<tbody>
<tr>
<td></td>
<td>Local disaster funds &amp; plans</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>The new civil society proclamation</td>
<td>Policy and practice at all levels of government – from the National Disaster Risk Reduction Management Council (NDRRMC), regional line agencies, through to community level councils - includes internal revenue allotment</td>
<td>Utilising capacity building by international organisations and in other ways (e.g. free online courses)</td>
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<td>Community level disaster management committees/local bodies with more authority/flexibility</td>
<td>Preparedness drills by army, Red Cross &amp; NGOs &amp; security forces trained in disaster response</td>
<td>Trust and positive relationship with community</td>
<td>Communities are already organised</td>
<td>Building relationships with local organisations through local forums and platforms contributes to creating partnership</td>
</tr>
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<td></td>
<td>Local disaster funds &amp; plans</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Flourishing of the private sector and civil society</td>
<td>Good partnership between local and international organisations</td>
<td>Developing and improving new financial systems</td>
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<td></td>
<td>Community level disaster management committees/local bodies with more authority/flexibility</td>
<td>Preparedness drills by army, Red Cross &amp; NGOs &amp; security forces trained in disaster response</td>
<td>Rich experience of the local actors on humanitarian response and collaboration</td>
<td>Donor agencies who respect humanitarian rules</td>
<td>Building partnerships section in international organisations</td>
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<tr>
<td></td>
<td>Local disaster funds &amp; plans</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Volunteerism within country encouraged</td>
<td>Local organisations have capacity</td>
<td>Creating a website for local organisations (similar to the work of NCCI) with the aim of coordination and joint cooperation between local organisations</td>
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<td></td>
<td>Community level disaster management committees/local bodies with more authority/flexibility</td>
<td>Preparedness drills by army, Red Cross &amp; NGOs &amp; security forces trained in disaster response</td>
<td>New financing options such as Go funds &amp; mobile technologies.</td>
<td>The traditions in the community and relationships of people</td>
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<tr>
<td></td>
<td>Local disaster funds &amp; plans</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Improved communication from large agencies/networks</td>
<td>Policy and practice at all levels of government – from the National Disaster Risk Reduction Management Council (NDRRMC), regional line agencies, through to community level councils - includes internal revenue allotment</td>
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<td>Community level disaster management committees/local bodies with more authority/flexibility</td>
<td>Preparedness drills by army, Red Cross &amp; NGOs &amp; security forces trained in disaster response</td>
<td>Networking of Integral Alliance to access and create partnership with other donors within the Integral Alliance</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<tr>
<td></td>
<td>Local SDGs</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Networking of Integral Alliance to access and create partnership with other donors within the Integral Alliance</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td></td>
<td>Increased access to remote areas</td>
<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Access to Capacity Building Workshops/Partnership meetings like to this</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>New trust building from Integral</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Training of local human resources</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
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<tr>
<td></td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Community Partners who are part of DRR</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td></td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Support systems from Integral but allow autonomy</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td></td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Our experience at disaster response means opportunities of jobs and funding</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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<td></td>
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<td>Policy &amp; structures in place e.g. DRM2017, CP2019, NDMA</td>
<td>Creation of internal standby funds</td>
<td>The constitution and the laws of the country and/or lack of government responsibility – both provide opportunity</td>
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</tbody>
</table>

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A. The things about the systems/people/context that could be changed and used as inroads to strengthening LLHA.

B. The things about your organisation or partnership with Integral Member that could be changed and used as inroads to strengthening LLHA.