Localisation in Evaluation
Learning Paper
June 2023

Introduction

In May 2023, IOD PARC ran a workshop on 'Localisation in Evaluation' as part of the Ukrainian Evaluation Association annual conference. The focus of the session was to discuss the conception of localisation within humanitarian and development assistance more broadly, and then examine how those principles could be translated into monitoring, evaluation and learning (MEL) processes. The discussion recognised that localisation in MEL includes a focus on both i) working in partnership on MEL assignments, as well as ii) including perspectives of local actors in the processes. As the session was only two hours, the partnership aspect of localisation within MEL constituted the key focus of discussions.

This short learning paper draws on the workshop and sets out the main points discussed, as well as the main learning areas and points of consideration moving forwards.

Localisation

Localisation "enables the meaningful engagement and leadership of local and national actors in humanitarian response, enhancing capacity exchange and increasing direct funding.[1]" The focus of localisation is on:

1. Engagement: engagement and leadership of local actors in humanitarian coordination.
2. Capacity sharing: agreeing on minimum standards/arrangements to strengthen the sharing of capacity.
3. Resourcing: supporting efforts to increase and channel more direct funds to local NGOs

As highlighted in the UN Secretary-General's report for the World Humanitarian Summit (WHS), the purpose of localisation is to *'reinforce, not replace'* local systems. It advocates for focusing on leveraging the comparative advantage of an increasing range of humanitarian and development actors and strengthening collaboration between national and international actors. A locally-led response has several advantages, including better access to affected populations and a better understanding of the context, history and culture.

Localisation and MEL

The learning from the workshop is presented below and is clustered around the three key principles of localisation outlined above. The focus of the workshop discussions was around partnerships between international consultancies and either local consultancy companies or individual consultants, and the learning is therefore centred around that.

1. Engagement

Timeframe of the partnership: the timeframe of the partnership and the assignment is important for several reasons. The longer the partnership, i.e., over multiple assignments and engagement outside of assignment, the stronger the relationship and the greater the opportunity to capitalise on other aspects of localisation, including capacity sharing. This also improves efficiency of the partnership which is a win-win both for the consultants and the client(s), as less time is spent discussing methodologies, approaches, and tools over time. However, this does require considerable investments from all stakeholders involved – including the funders of MEL assignments.

[1] Inter-Agency Standing Committee (IASC) Task Force 5 on Localisation

Roles within the team: participants observed that there has been a positive shift in increasing the balance of roles and responsibilities among the international and national team members over time, but that work is still needed on this. Participants noted that only including national team members to conduct data collection because they speak the relevant languages or can access specific locations is extractive and contradicts the spirit of true partnership and localisation. To genuinely reflect localisation principles, it is crucial not to include national consultants in the data collection stage only. National consultants should instead be included equally at all stages of the assignment, from development of the methodology to the co-creation of recommendations.

Comparative advantages: genuine partnerships allow the full MEL team to effectively harness the comparative advantages of the international and national team members. Comparative advantages of national organisations and consultants include greater access to networks, target groups and personal contacts and connections; greater understanding of the context which contributes to stronger context analyses, including gender-sensitive analyses that consider intersectionality, age and diversity; and greater cultural sensitivity which allows for more ethical implementation of methodologies and data collection. Comparative advantages of the international team members may include existing relationships with/understanding of the client and their ways of working, as well as understanding of similar sectors/programmes in different contexts. All these points make the MEL process more effective and efficient, leading to a win-win for both the client(s) and the MEL team.

Shift in language and perspectives: participants have observed an evolving shift in language from terms such as 'local consultant' to 'national expert', which is an important change in connotation given that national organisations and individual consultants have high levels of relevant expertise. However, it was noted that this shift is still a work in progress, with more work needed to change perspectives of some international organisations and donors. An even more positive shift would be to move away from differentiating between 'national' and 'international' team members and instead focus on the skills and experience that each individual brings to the team.

"Good enough" approaches: in humanitarian settings, particularly in the early response stage of an immediate onset disaster, 'good enough' approaches are often required, i.e., approaches that reduce morbidity and mortality but that may not be able to account for every cent spent or every food item distributed. Consequently, 'good enough' approaches to evaluating such a response are also required where good quality data may not be available and flexible methods are required. By working with national organisations/individuals, the 'good enough' approach is informed by an understanding of the context and culture, which would not be the case if only done by an international organisation. This is important for the team to uphold the 'do no harm' principle.

Developing valuable recommendations: as noted above, national organisations' and consultants' inherent understanding of the context means the recommendations developed as part of the evaluation process tend to be more rooted in operational reality and local need. They also reflect important nuances and perspectives that might otherwise be missing.

2. Capacity sharing:

Two-way channel of sharing: both international and national consultants within teams have valuable expertise in various relevant areas to share which can be leveraged at both proposal stage and during the MEL assignments. This can be done both formally and informally.

Timeframe of the partnership: as outlined above, the longer the partnership and/or assignment, the greater the scope for capacity sharing. For longer-term assignments, capacity sharing can be built into the workplan and can include specific methods, data collection tools, culturally sensitive approaches and context analyses.

3. Resourcing:

Donor/client engagement: participants observed that while some donors and clients have shifted in their approach to fee rates and budgets, others still differentiate between ‘international’ and ‘national’ fee rates, with international rates usually significantly higher for the same roles and responsibilities. Consultants can end up being paid less when they work in their own country compared with when they participate as an 'international consultant' in a regional project or project in another country. This can also be true for DSA rates, with lower rates for nationals. Clients/donors need to understand that this contradicts the principles of localisation, as well as being simply unethical.

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