

# INGO LOCALISATION PLAYBOOK



HUMANITARIAN  
IMPACT INSTITUTE  
Inclusive Learning



## Purpose of this Playbook

This guide has been developed based on the Humanitarian Impact Institute's (HII's) extensive work with more than a dozen INGO localisation and partner-led programs. It turns **common and practical** lessons experienced by most of these INGOs into a 10-step guide for maximising the chances of an INGO and UN agency making meaningful progress on localisation.

The Playbook is a tool for both headquarters (Boards, CEOs, executive teams) and program/regional/country teams.

Remember that localisation is a journey to every decision, action, interaction and document occurring with deference to the power dynamics in the partnerships.

## Briefings and Feedback

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Nathaniel Logan, *INGO Localisation Playbook*, Humanitarian Impact Institute, Dublin, 2025

Briefings and presentations on the Playbook can be requested by email: [info@hi-institute.org](mailto:info@hi-institute.org)

HII would value your feedback and thoughts on this Play Book. You can provide this in your preferred language at <https://hi-institute.org/feedback>



## 10 Localisation Steps for INGOs

The following 10 steps have been developed from analysing more than a dozen INGOs at different levels of localisation maturity. Implementing these steps will help your INGO or agency make significant progress on localisation.

1. **SET THE LOCALISATION AMBITION:** Set a time defined organisational ambition for localisation. This should articulate the future role of the INGO in a localised approach, intended localisation maturity, ways of working with L/N partners, partner selection, power dynamics and a risk tolerance. Paint a specific picture of what localisation means in your INGO.
2. **COMMUNICATE THE ROLE OF THE INGO AND ITS STAFF:** Leaders proactively and repeatedly articulate to staff what their roles will be when the INGO's Localisation Ambition is achieved.
3. **TURN THE AMBITION INTO STRATEGY:** Embed the Localisation Ambition into the organisational strategy by turning it into SMART goals/indicators that enable senior leadership teams and Boards to connect strategy to implementation and monitor progress towards the Localisation Ambition.
4. **ADAPT INGO SYSTEMS & PARTNER FINANCING:** Create a roadmap for adapting policies and processes/systems to reduce friction in localised ways of working and financing for L/N partners.
5. **TAILOR RISK MANAGEMENT:** Prioritise the key risks that need managing in localised ways of working, and then tailor a control framework to the uniqueness of those risks. This will ensure compliance activity is commensurate, reducing over-application of low impact mitigations.
6. **EXCHANGE CAPACITY:** Establish the internal capability to: increase the sustainability and capability of L/N partners; based on each L/N partner's unique needs and ambitions; and create a two-way exchange of learning back into INGO programming and decision making.
7. **ENABLE EQUITABLE DECISION MAKING:** Nominate/sponsor L/N partners to actively participate in eco-system decision making fora as well as INGO decisions that are of importance to L/N partners.
8. **TRAIN STAFF IN LOCALISED WAY OF WORKING:** Educate your workforce on how to work, communicate, manage risk and increase quality while working in a localised way and shifting power to L/N actors.
9. **COLLECTIVE DONOR ADVOCACY:** Participate in collective advocacy to adapt key donor compliance requirements that enable localised responses.
10. **DRIVE ACCOUNTABILITY TO PARTNERS:** Share your Localisation Ambition with L/N partners; ask them their preferences for sharing [anonymous] feedback on the INGOs progress; turn that feedback into adaptations and learning.





## The Localisation Challenge

### Why Localisation?

The momentum towards localisation and partner-led programming<sup>1</sup> is partly premised on sustainable impact being driven by community ownership through local/national (L/N) actors.<sup>2</sup> It is also based on the growing consensus that effective programs are designed and implemented by, and/or collaboratively (in the most meaningful sense) with, those who best understand the needs and context – the affected communities and those from it.

Achieving localisation will occur when a shift has occurred from existing decision making and power structures to more equitable decision making, risk and resource sharing between international and L/N actors.

There is a role for international actors in most circumstances – albeit one that is humble, more equal and balances relative strengths.

### Why is Localisation difficult?

Localisation is mostly about mindset, knowledge and learning. As more international actors (including INGOs and UN agencies) begin or advance their localisation journey, they will face a range of challenges that may cause their progress on localisation to plateau.

From working with a dozen INGOs on localisation, the Humanitarian Impact Institute (HII) has found the most common reasons for lack of progress on localisation are:

1. Risk and compliance approaches of donors and INGO/UN systems.
2. Definitional misunderstandings of localisation and goals.
3. INGO/country-office leadership not being committed to localisation and/or not understanding how to achieve it in practice.
4. INGO systems/processes not being adapted for partner-led working.
5. INGO culture and personnel not believing in localisation, and/or not supporting localisation and/or not understanding how to 'do' localisation.
6. INGO programming approaches being inflexible and prioritising the expertise of international ways of working over local skills and knowledge.
7. Donor risk requirements result in incommensurate application of controls that distract L/N actors from service delivery without real risk reduction.
8. Accountability and power dynamics between INGOs and L/N partners

<sup>1</sup> While these two concepts are different, this playbook uses them interchangeably.

<sup>2</sup> DFAT Guidance Note: Locally Led Development: Australian Government: Department of Foreign Affairs and Trade, page 1. <https://www.dfat.gov.au/sites/default/files/dfat-guidance-note-locally-led-development.pdf>





## Step One: Set the Localisation Ambition

**Task:** Set a time defined organisational ambition for localisation. Elevate this to the level of an organisational strategic goal, not just a policy document.

**How:** Your staff need to know what your INGO means by localisation and the specific goals it wants to achieve from localisation. It needs to be specific so that staff know what the organisation wants to achieve and how they should go about achieving it. The Localisation Ambition should therefore include clear expectations on:

1. **Partner selection:** is your INGO (for example) empowering women-led CBOs; or maximising quality; or supporting local/national actors into decision making fora; or something else? What is stated here will guide future partner selection.
2. **Decision making:** how equitable will your localisation approach be? At what level will L/N partners participate in decision making (strategy/ response/ country/ program level), in what capacity and on what topics? What is stated here will guide country offices in how to engage L/N partners on decision making.
3. **Power dynamics:** be clear on how INGO staff should think and act in regard to power dynamics. If there are any exceptions in your ambition to shift power, state them clearly. What is stated here will set the benchmark for where/when/how to shift power.
4. **Risk management:** be clear on how the INGO will adapt control frameworks to manage risks from L/N partners effectively while balancing different partner capacities with their ability to deliver services. A good ambition will emphasise meaningful risk reduction instead of an over application of controls. What is stated here will enable staff to know where they can adapt to L/N compliance needs.
5. **Capacity exchange:** provide clear strategic intent for multi-directional capacity exchange and a recognition of strengths and weaknesses between your INGO and L/N partners. This will help staff design mutually beneficial capacity exchanges.
6. **Systems adaptation:** set a clear expectation for systems, policy and process owners on the extent to which adaptations must be changed to drive localised ways of working. What is stated here will help support teams to understand how localisation should be factored into systems and processes.
7. **Role of the INGO:** Be clear on the role of your INGO as an intermediary, how it will add value with L/N partners in a Response and the role of INGO staff when the Localisation Ambition is achieved. This articulation will give confidence to staff that they have a role and enable them to adapt to that future role more willingly.
8. **Funding goal:** Set the goal(s) for the target/proportion of funding that will be delivered in partner-led programming by your INGO; and how overhead funding will be managed. Stating this enables staff to plan programs and manage finances with clear direction.



9. **Trust and equity:** set a measurable goal so partners can assess the INGO's trustworthiness and power sharing culture safely back to the INGO. Stating this provides staff with clarity on how they will be measured on localisation.
10. **Donor change:** Consider a commitment to influencing and educating donors on the changes they can and should make to better enable localisation.
11. **Timebound:** be clear on when the Localisation Ambition must be achieved by.

A well-articulated strategic ambition will enable your staff to understand exactly what is expected of them on localisation in all the key areas that enable or prevent localisation. Otherwise the absence of a clear ambition will contribute to variable understanding of goals, frustrated/conflicted staff and a lack of overall progress on localisation within your INGO.

Your Localisation Ambition should be Board endorsed and CEO team driven, while being validated for meaningfulness and completeness by specialist internal/external localisation experts and internal program teams with experience in localisation.



## Step Two: Communicate the role of the INGO and its staff

**Task:** INGO leaders proactively and repeatedly articulate to staff what their roles will be when the INGO's Localisation Ambition is achieved.

**How:** While localised ways of working require a transition of decision making and resources to L/N actors, there remains a role for INGOs. At a *minimum* this includes mobilising resources in ways that L/N actors cannot; tailored risk reduction for donors; and sharing global best practice.

INGO staff need to repeatedly hear from senior INGO leaders that (whatever the defined) role, does exist for their staff and see this explicitly in the organisation design. This reassurance builds buy-in for the transition to localisation because it removes the existential concerns of staff while also providing clarity on the direction and added value of a localised approach.

However it only works where the role is well thought-through, is well articulated and when *all* senior leaders understand that role well. Gaps here (including in the confidence of leaders to articulate the role accurately and frequently) will erode staff confidence, create ambiguity and lower morale - ultimately undermining the achievement of the Localisation Ambition and reducing the likelihood of achieving the added value of localised ways of working.

By being clear on what the role of the INGO is in a localised state, INGO staff will be able to see themselves in that future state and be confident of the role they will be playing in the future. The ability to see themselves in that future state should dramatically reduce internal resistance to localised ways of working, making the Localisation Ambition more likely to succeed.

**Watch out for:** Simplistic, underdeveloped statements lacking specificity will do more harm than good, as will senior staff not understanding those statements. Such vagueness will create tensions, will enable loopholes and will lead to teams and leaders co-opting localisation language without meaningful change in programming.



## Step Three: Turn the Ambition into Strategy

**Task:** Embed your Localisation Ambition (described in Step One) into the organisational strategy by turning it into SMART goals/indicators that enable senior leadership teams and Boards to connect strategy to implementation and monitor progress towards the Localisation Ambition.

**How:** The following minimum steps are required to translate your Localisation Ambition into your strategic planning framework:

1. **Strategic Goal:** The Localisation Ambition should be a strategic goal of the highest level in your planning framework, clearly articulated in your public Strategy document.
2. **Set Milestones:** In your Strategic Plan,<sup>3</sup> set clear milestones for the progress that needs to be achieved each year between now and the end of the Strategy, in order for the localisation goal to be achieved in the time set. These milestones should be clear on the systems/process milestones, the people and culture milestones and the compliance/risk milestones, all with clear indicators that will allow the organisation to track whether each milestone has been achieved and who (i.e., which business units) are responsible for achieving them.
3. **Business Plans:** Annual business unit plans should then be based on achieving the milestones set in the Strategic Plan. Additional resources required for achieving these milestones must then be allocated through the strategic planning process, as otherwise achieving the strategic goal (i.e., a top level priority of the organisation) may fail.
4. **Connect Individual Performance:** Individual performance targets and goals should be linked to whether their team has delivered their component of that year's milestone.
5. **Independent Progress Tracking:** Measurement of whether these goals have been achieved should be unbiased and not assessed by anyone responsible for achieving the stated goal - the more objectivity there is in this process, the more likely the organisation will achieve its strategic goals. Likewise, learning and reflection on progress should be frequent, broad and learning focused.
6. **Equitable Financing:** Finance the Localisation Ambition and ensure there are changemakers with real power to enforce these financing arrangements. Financing

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<sup>3</sup> This is the document that usually sits below the public Strategy document and can have other names. It is not usually a public document but it does articulate a pathway between the current state and the goals articulated in the public Strategy, with key time-bound progress milestones/targets set for each strategic goal - essentially providing a clear roadmap for how the organization will achieve its objectives that annual plans then take their goals from.





includes partner overhead within projects/programs, equitable budget sharing based on value and capability contributions and ensuring the internal changemakers are funded and systems changes, training etc. are budgeted.



## Step Four: Adapt INGO Systems & Partner Financing

**Task:** Create a roadmap for adapting policies and processes/systems to reduce friction in localised ways of working and financing for L/N partners.

**How:** Every INGO has different processes and systems so it is not possible for this Playbook to be exhaustive about the policy/system/process adaptations your INGO needs to make to better enable localised ways of working. However, all INGOs that HII has worked with have a number of these that create friction for localised ways of working. These include monitoring & evaluation; due diligence; documentary verifications; program quality; training requirements; key policies; financing; compliance and risk management.

The bigger the organisation, the more likely that systems/processes/policies create friction with localisation. The friction could be that the systems are built for internal users only so prevent L/N partners to work within; or that the systems require L/N partners to merge their equivalent systems with your INGO's systems; or that the policies divert resources from implementation to compliance activity that does not actually reduce risk (see Step Five).

INGOs therefore need to create an internal map of the systems/processes/policies that need adaptation in order to enable localised ways of working. The most impactful changes should then be prioritised (with resources in Strategic Plans) to change.

INGOs must also ensure that partner financing is equitably shared and non exploitative (i.e., must include shared overhead provisions). Systems/processes and policies often prevent this and so need addressing. Your revised policies on equitable budgeting will either be the most celebrated or derided example of your commitment to localisation depending on how closely they match localisation principles and your Localisation Ambition - deviations here will fatally undermine your localisation efforts.

INGOs without much exposure to localised ways of working will find it difficult to know what needs changing. Piloting localised ways of working is therefore recommended, combined with an effective lessons capture process and an effective feedback mechanism with partners (see Step 10).



## Step Five: Tailor Risk Management

**Task:** Prioritise the key risks that need managing in localised ways of working, and then tailor a control framework to the uniqueness of those risks. This will ensure compliance activity is commensurate while reducing the over-application of low impact mitigations and controls.

**How:** Both donor and INGO policies are created to remove most risk in audit, safeguarding, fraud and other areas. It is important to reduce risk exposure. However, in reality most INGOs believe risks are being managed more effectively than they actually are and many controls do not meaningfully reduce risk.

This is a problem for localisation where the over application of controls reduces the time a small L/N partner can spend delivering services to affected communities.

Examples of the over application of controls without meaningful risk reduction include:

- Rejecting documentary verification because the L/N partner approval format does not match the INGO format.
- Requiring a highly experienced and well regarded community-based L/N partner supporting victims of GBV to undergo generalised safeguarding training.
- Due diligence assessments that ask for a wide range of policies regardless of the L/N partner's exposure to the risks those policies are designed to mitigate.
- Requiring a small CBO with few management staff to have three signatures on a procurement that otherwise demonstrates value for money.

These are a small set of examples of where the application of a control is time consuming for a L/N partner but there is no commensurate reduction of risk from the application of that control. The smaller the L/N partner, the more negatively impactful and difficult the combined application of these controls becomes.

A more localisation-friendly approach to risk management would instead better balance the need for risk reduction while not distracting L/N partners from their community-based work. This approach should entail:

1. Prioritise the risks your INGO most needs to manage with L/N partners. These categories are likely to be fraud, neutrality and safeguarding.
2. Focus control application on meaningfully reducing just those risks.
3. Tailor the controls to the partner type and the context. Small CBOs have a different risk exposure to a large national NGO.

The result will be threefold, starting with (a) effective risk reduction, as well as (b) decreased burden on the L/N partners, and (c) a more equitable partnership devoid of unnecessary process.

HII's guide on Risk Management in Localisation expands further on this.



## Step Six: Exchange Capacity

**Task:** Establish the internal capability to increase the sustainability and capability of L/N partners; based on each L/N partner's unique needs and ambitions; and create a two-way exchange of learning back into INGO programming and decision making.

**How:** Remember that in our traditionally colonial dynamics that many INGO personnel have long learned the lesson that INGO ways of working are the best. But if that were true, then every INGO would work the same way, which of course they do not. This is reinforced because INGOs have access to the majority of funding and have therefore been able to scale their impact in many parts of the world and have many additional sources of expertise compared to L/N actors who have been comparatively starved of these types of resources.

Colonial dynamics often also extend to an apparent deference that L/N actors sometimes show to INGOs. This should be recognised for the power dynamics it often is, and not used to reinforce perceptions of superiority in contextual knowledge.

However, change starts by an acknowledgement that many L/N actors have significant expertise in what does and does not work *in their context*. Good localisation practice on capacity exchange occurs when INGOs incentivise staff to understand different approaches L/N partners use and then adapt INGO programs to complement those approaches.

Likewise, L/N partners are not a homogenous group. They all have different ambitions, different skills and different sectors of focus. An equitable partnership recognises this and supports partners to achieve their specific goals.

Therefore some simple steps to equitable capacity exchange are:

1. Co-develop unique capacity development plans for each partner that wants your support in this regard. Consider the specific support they need for their goals, such as whether they want to be influential in decision making forums; want to increase their sustainability and fundraising exposure; or want to expand their sectors.
2. Ensure that your funding model enables overhead funding wherever possible - anything other than this is an exploitative funding model and reduces the ability of L/N partners to become sustainable.
3. Prioritise partner opportunities over INGO dominance in forums.

Engage in meaningful two-way capacity exchange that includes learning the successful approaches the L/N partners use.



## Step Seven: Enable Equitable Decision Making

**Task:** Nominate/sponsor L/N partners to actively participate in eco-system decision making fora as well as INGO decisions that are of importance to L/N partners.

**How:** This is a simple but powerful step for meaningfully shifting power. For those L/N partners that have the ambition, support them (through sponsoring/ nominating/ advocating) to join decision making and coordination forums relevant for each partner.

In addition, equitable decision-making means participation in your own decisions that matter to L/N partners. This adds time to some decision-making processes, but it shows commitment to the Localisation Ambition in sharing power equitably. Not all decisions require this consultation, and some partners will not want the extra burden of consultation on something not fundamental to them.

However, there are decisions you will be taking that do matter to them and in which the decisions will be better and more equitable by having their voice as part of those decisions. These decisions could include country strategy or INGO policy decisions but should be set by the Localisation Ambition.



## Step Eight: Train Staff in Localised Ways of Working

**Task:** Educate your workforce on how to work, communicate, manage risk and increase quality while working in a localised way and shifting power to L/N actors.

**How:** Most INGO personnel have been working efficiently within the systems and processes that the INGO has developed and refined over decades.

It is therefore difficult for them to shift to a partner-led response and expect them to know how to do it well. At best you will see well-meaning efforts to adapt with a lot of lessons learnt. At worst you will experience open or hidden hostility to the underlying principles of localisation, perhaps including a misbelief that L/N actors cannot deliver the same levels of quality as INGOs.

To give your INGO the best chance of success in localised ways of working, you need to train your workforce in the following key areas:

1. **Cultural orientation:** The desired [organisation] cultural orientation to localisation and why shifting the decisions and implementation of programs as close as possible to the affected communities increases relevance, sustainability and therefore effectiveness.
2. **Power dynamics:** To recognise partnership power dynamics and to learn how to make them more equitable in thousands of meaningful ways.
3. **Risk and compliance:** Tailored compliance and risk management in localised and partner-led programs.
4. **Targets:** The goals and indicators under which success for localised/partner-led ways of working will be measured.
5. **Roles:** The role of the INGO and its staff in localisation and how the INGO and its staff can add value and increase effectiveness in the response equitably. This is often the most difficult component, while being the most essential for making progress on localisation.





## Step Nine: Collective Donor Advocacy

**Task:** Participate in collective advocacy with donors to adapt key compliance requirements that enable localised responses.

**How:** Likeminded INGOs and other actors should develop a clear set of 'asks' of key donors that better enable INGOs to achieve the localisation goals that donors have set. This is being done in several forums already, however these forums are making little progress in fundamental areas with key donors.

INGOs should therefore build a coalition of INGOs and L/N actors to collectively advocate for these changes to be implemented by donors outside of the tightly controlled forums into which these discussions are currently channeled.

Using the advocacy toolkit to publish donor progress would better highlight donor accountability, responsiveness and residual mismatches in their goals and their processes.

Collective action in this regard will be stronger, more unified and easier for donors to respond too.



## Step Ten: Drive Accountability to Partners

**Task:** Share your Localisation Ambition with L/N partners; ask them their preferences for sharing [anonymous] feedback on the INGOs progress; turn that feedback into adaptations and learning.

**How:** This is a learning focused accountability mechanism that also demonstrates equity. The purpose of asking L/N partners how they would prefer to provide anonymous feedback enables them to describe a process that enables them to be candid without fear of repercussions.

Remember that even if anonymous, long-entrenched power dynamics will likely limit the honesty and safety in which partners feel they can provide accountability here. So these principle are suggested to minimise barriers:

1. Feedback is anonymous by default.
2. Raw feedback is not reviewed by the country team as this will likely lead to identification and this risk will decrease the meaningfulness and frequency of the feedback - it should instead be periodically analysed by an external party to draw lessons.
3. The mechanism of feedback should be simple, open 24/7 365 days a year and in the preferred language of the person wanting to give feedback.
4. Periodic analysis of the feedback should be shared with partners.
5. Feedback should be aggregated across the INGO and then shared for wider lesson learning.





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