

# PARTNERSHIP AND LOCALISATION STRATEGY

2021 - 2025



**trōcaire**

# ACRONYMS

ALNAP	Active Learning Network for Accountability and Performance
C4C	Charter for Change
CBO	Community-based Organisation
COVID-19	Coronavirus disease
CSO	Civil Society Organisation
INGO	International non-governmental organisation
LNNGO	Local and national non-governmental organisation
MoU	Memoranda of Understanding
NEAR	Network of Empowered Aid Response
NGO	Non-governmental organisation
UN	United Nations

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The ideas, comments and recommendations contained herein are entirely the responsibility of the author(s) and do not represent or reflect the policy of Irish Aid.



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**Cover Photo:** Juana Zuniga (38) gives a speech in front of the Public Ministry in Tegucigalpa after the disappointing decision of the judge on the jailing of 7 community activists. Photo: Giulia Vuillermoz

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# CONTENTS

<b>INTRODUCTION</b>	2
<b>PART 1: ORGANISATIONAL FRAMEWORK</b>	4
<b>Partnership, Localisation and How They Interface</b>	4
<b>Theory of Change</b>	6
<b>The Global Hub on Partnership &amp; Localisation</b>	7
<b>How to Be Leaders in Localisation in our Country Offices</b>	8
<b>How to Be Leaders in Localisation at Head Office</b>	9
<b>Sustainability</b>	9
<b>PART 2: STRATEGIES FOR EACH OUTCOME</b>	10
<b>Outcome 1: Voice and Influence</b>	10
What we are aiming to achieve	11
How we will achieve it	11
Who our work will support	12
Who we will collaborate with	12
<b>Outcome 2: Capacity Strengthening</b>	12
What we are aiming to achieve	13
How we will achieve it	13
Who our work will support	14
Who we will collaborate with	14
<b>Outcome 3: Quality of Partnership</b>	14
What we are aiming to achieve	14
How we will achieve it	15
Who our work will support	16
Who we will collaborate with	16
<b>Outcome 4: Funding and Resources</b>	16
What we are aiming to achieve	16
How we will achieve it	17
Who our work will support	17
Who we will collaborate with	17
<b>PART 3: HOLDING OURSELVES TO ACCOUNT</b>	18
<b>Partner Advisory Group on Localisation</b>	18
<b>Knowledge Management and Measuring Progress</b>	18
<b>Measuring Progress: Menu of High-level Indicators</b>	19

# INTRODUCTION

**Berta Cáceres**  
Environmental Activist, Indigenous Leader, Honduras  
04/03/71 - 03/03/2016



Bertita Zuñiga Cáceres, daughter of environmental activist Berta Cáceres murdered in 2016, holding a photo of her mother in Belfast. Bertita is leader of the Civic Council of Popular and Indigenous Organisations of Honduras and is supported by Trócaire. Photo: Trocaire

Trócaire has worked in partnership with local organisations for nearly 50 years, and it is a core and defining aspect of who we are. In our Strategic Plan (2021-2025)<sup>1</sup>, we have committed to the evolution of our partnership approach by furthering the localisation of development and humanitarian action.

Trócaire recognises the increasing level of capacity of civil society in the Global South and the consequent need for our role as a partnership agency to adapt appropriately to their changing needs. We also observe that the role of northern international non-governmental organisations (INGOs), often referred to as ‘intermediary agencies,’ is increasingly—and rightly—being questioned and know that this role is likely to evolve over the coming years.

Based on our experience, **we believe that localisation delivers more sustainable and impactful development and humanitarian responses in the countries where we work. Moreover, we feel that a system aimed at ‘developing countries’ will be richer and more effective with the voices and influence of the communities it is intended to change at the heart of those processes.**

The discourse on localisation has deepened over the past five years, but the lack of progress on the commitments made under the Grand Bargain indicates the ongoing need for systemic transformation.

For example, Grand Bargain signatories committed to a 2020 target of at least 25 percent of international humanitarian assistance being passed to local and national actors. However, this goal has not been attained. Across the countries where Trócaire works, there are

<sup>1</sup> See <https://www.trocaire.org/documents/trocaire-strategic-plan-2021-2025/>

limited funding opportunities that are exclusively accessible to and managed by local actors. Some international agencies have nationalised or are in the process of nationalising their operations, which risks limiting funding flows to local organisations. The imbalance of power remains between international and local entities, which raises questions about the ongoing legacies of colonialism and racism.

More recently, the COVID-19 pandemic has brought into question the sustainability of the model of international development and humanitarianism while highlighting the importance of local actors. When considered together with recent discussions about power and racism in the sector, it has brought into clear focus the need to strengthen our efforts to cede space and shift power to the Global South.

During the period of its previous strategic plan, Trócaire invested considerable resources in understanding our partnership model from the lens of localisation. Our 2017 report, *More Than the Money: Localisation in Practice*,<sup>2</sup> identified areas of tension for local and national actors in relation to localisation, as well as recommendations for Trócaire to strengthen our partnership approach, support local civil society, and advance localisation discourse at country and global levels.

As a follow up, in 2019 Trócaire published *Partnership in Practice: Steps to Localisation*.<sup>3</sup> This report presented practical pathways for Trócaire to undertake to advance localisation against four core areas: voice and influence, capacity strengthening, partnership, and funding and resources. Both reports influenced Trócaire's 2020 Keystone survey, which was conducted globally across all our partners to acquire direct feedback on our partnership approach, our added value, and the role we can best play to support their work in the future.

This culminated in the organisational shift that links partnership and localisation, as expressed in our current strategic plan. This internal shift comes as the Grand Bargain prepares for its next phase, the Grand Bargain 2.0, which centres on two priority areas: greater support to local leadership and participation of affected communities, and longer-term, more flexible funding to local actors.

Trócaire's Partnership and Localisation Strategy aligns with these priority areas and other localisation commitments, which we will apply across the humanitarian-development-peace nexus. In creating this strategy, we hope to guide Trócaire's staff and partners through this strategic evolution of our work and provide greater insights into the core areas of our localisation framework. We hope this will leave Trócaire in a position to not only influence localisation at the organisational level, but also to push for transformational change across the Triple Nexus that results in greater local influence, more equitable partnerships, and better development and humanitarian action for the people we support.

Eyokia Donna Juliet, Chair of the Uganda Charter for Change Working Group, presenting during the annual localisation dialogue on 20th October 2021. Photo: Trócaire



<sup>2</sup> See <https://www.trocaire.org/sites/default/files/resources/policy/more-than-the-money-full-report.pdf>

<sup>3</sup> See [https://www.trocaire.org/sites/default/files/resources/policy/partnership\\_in\\_practice\\_-\\_steps\\_to\\_localisation\\_web.pdf](https://www.trocaire.org/sites/default/files/resources/policy/partnership_in_practice_-_steps_to_localisation_web.pdf)

# PART 1: ORGANISATIONAL FRAMEWORK



Daw Mya Si washes her hands with soap provided by Trócaire's local partner Htoi Chyetpawng Chan village, which is in Kachin State in the north of Myanmar. Photo: Ring Nu Awng / RANIR

## Partnership, Localisation and How They Interface

The empowerment of civil society through partnership has been core to Trócaire's work since 1973. Trócaire has defined **partnership** as *a relationship with another civil society organisation (CSO) that Trócaire supports in some form to achieve mutually agreed objectives, with the aim of serving the basic needs and supporting the rights of poor and marginalised people in the developing world.*

Trócaire's partners include community-based organisations (CBOs), local and national non-governmental organisations (LNNGOS), regional organisations, networks, research centres, and Church-based organisations, among others. The types of support Trócaire provides can include funding for programmes or projects, organisational capacity support, technical support on project implementation, and advocacy or networking support.

Partnerships include long-term strategic relationships and short-term relationships contributing to a specific, time-limited objective or initiative. Trócaire's **preferred approach is to develop long-term strategic relationships**, whenever possible.

Under a partnership model, Trócaire has played a significant role in the design of programmes and projects in close coordination with our partners. Trócaire also ensures that formal evaluations are undertaken of programmes and projects. Together, Trócaire and its partners engage in research and learning that will influence and shape future work.

Traditionally, Trócaire's partnership model has been guided by five over-arching principles:

- 1) Partnerships are based on Shared Vision and Values
- 2) Partnerships support Poverty Alleviation and promote Social Justice and Gender Equality

- 3) Relationships are based on Trust, Accountability, and Transparency
- 4) Partners have Clear Roles, Responsibilities, and Expectations
- 5) Partnerships are based on Mutual Commitment and Flexibility

Over the past several years, as Trócaire's income has become increasingly dependent on institutional funding, a key element of our work has been the strengthening partners' capacities to meet the financial standards and compliance requirements of donors. To mitigate financial and compliance risks, Trócaire conducts assessments of partners' financial systems, their governance and management structures, and their capacity to deliver the proposed projects or programmes. Trócaire also assesses partners' safeguarding infrastructure, security capacity, and commitment to gender equality.

As part of its new strategic plan, Trócaire is taking its rich history of working in partnership and developing this into a model of meaningful **localisation**, where power is truly shifted to local organisations. We understand that partnerships can be experienced in diverse ways and the power dynamics in funding relationships are not always equitable. As with any relationship, there are risks of partnerships becoming hierarchical, transactional, and disempowering, particularly when one actor wields greater decision-making power compared to another.

The concept of localisation has been at the forefront of humanitarian discourse since the World Humanitarian Summit in 2016. The humanitarian sector has served as an entry point for these conversations, and definitions of localisation are often limited to this sector.

In its 2017 report, *More Than the Money: Localisation in Practice*,<sup>1</sup> Trócaire offered a definition of localisation that was later used in our 2019 publication, *Partnership in Practice: Steps to Localisation*.<sup>2</sup> However, this definition was limited to the humanitarian sector and only referenced links to development activities. Further, the definition did not factor in power dynamics, nor did it consider

<sup>1</sup> See <https://www.trocaire.org/sites/default/files/resources/policy/more-than-the-money-full-report.pdf>

<sup>2</sup> See [https://www.trocaire.org/sites/default/files/resources/policy/partnership\\_in\\_practice\\_-\\_steps\\_to\\_localisation\\_web.pdf](https://www.trocaire.org/sites/default/files/resources/policy/partnership_in_practice_-_steps_to_localisation_web.pdf)

programme participants, beyond the idea of community-level resilience. Trócaire believes that our organisational definition of localisation must apply across the Triple Nexus, as the power dynamics involved are not sector specific. We also feel it is crucial for the sector not to lose sight of programme participants within the localisation discourse, as they are at the centre of what we and our partners do.

Therefore, Trócaire has updated its definition of localisation as follows:

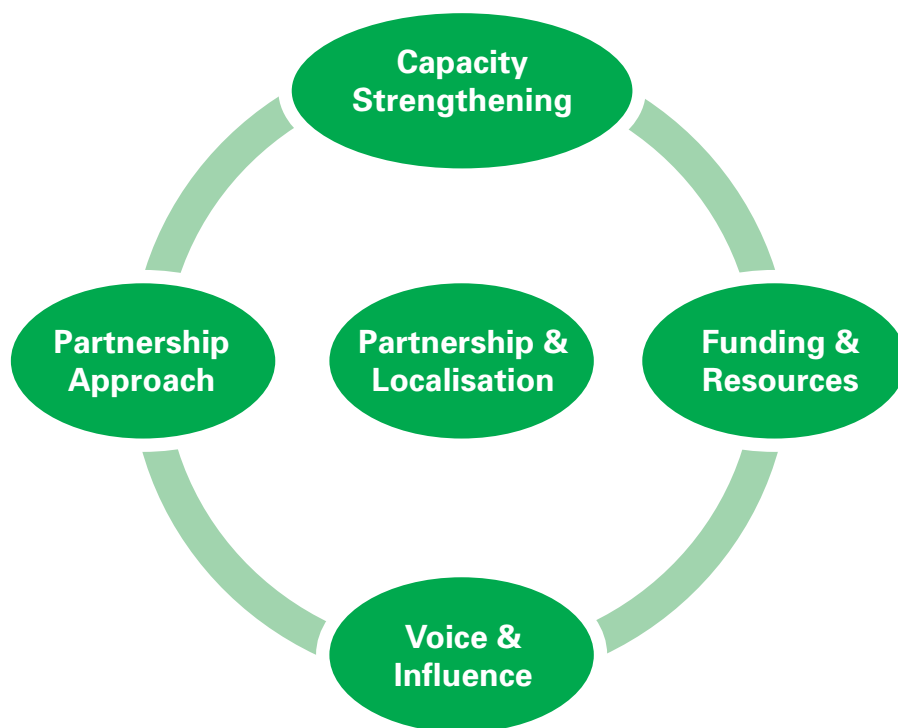
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***Localisation is a collective process involving different stakeholders that aims to ensure local actors, whether communities, civil society organisations, or local public institutions, are at the centre of humanitarian, development, and peacebuilding systems. Localisation challenges the root causes of unequal global to local power dynamics, structures, and systems, including the legacies of racism and colonialism. In addition to shifting power to local actors, localisation aims to deliver effective, timely, accountable, relevant, and appropriate services and supports to programme participants. Localisation can take several forms, including strengthened and more equal partnerships between international and local actors, increased and 'as direct as possible' funding for local organisations, and a more central role for local actors in coordination and decision-making structures.***

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As this definition critically examines the power dynamics involved in the relationships between agencies of the Global North and Global South, its application has implications on Trócaire's ways of working with local partners. By applying this definition, Trócaire can address barriers to equality by ensuring that local actors:

- Have more opportunities to access funding as directly as possible.
- Can participate in, influence, and take leadership in decision-making and coordination spaces.
- Have equitable decision-making power throughout the programme cycle, including the design of funding opportunities and proposals, as well as the allocation of resources.



- Are not treated as short-term sub-contractors to international agencies.
- Can cover necessary administrative and support costs, particularly when working with intermediaries.
- Own and direct their own capacity strengthening based on self-identified needs, rather than this being led by international agencies.
- Have opportunities to provide regular feedback to donors and INGOs to improve the quality of the services and support provided.
- Are represented fairly and transparently in the communications and donor reports produced by international partners, ensuring that they are given recognition and visibility.

The theory of change described in the following section provides a closer look at the four areas of Trócaire’s localisation framework that, if addressed, can result in more equitable relationships with partners, more just redistribution of power, and the delivery of more sustainable and effective initiatives.

## Theory of Change

Trócaire’s primary objective in delivering an organisational shift toward localisation is to **evolve in a way that enables us to effectively shift power to local partners and pushes the sector more broadly to deliver the same.**

This strategy document outlines how this can be done in practical terms, against the four interrelated outcomes of our localisation framework.

- **Outcome 1:** Support partners to have **increased voice and influence** in key spaces nationally and internationally.

This involves helping amplify local voices (particularly women-led and women-centred organisations) in sub-national, national, regional, and global development and humanitarian structures, so local actors increasingly lead and own these processes. This includes increasing Trócaire’s own advocacy in these structures in a manner that advances the localisation agenda, as well as evolving our external communications in the countries where we work, including Ireland, in line with the sector’s commitments to localisation.



- **Outcome 2:** Provide more effective **capacity strengthening** support for local and national partners, based on their expressed needs and more opportunities for two-way capacity strengthening.

This involves investing in partners' ambitions to become more resilient, independent, and sustainable organisations, beyond joint programming. Doing so requires that Trócaire strengthens its own capacity and approaches to ensure they meet partners' needs and add value to the partners' institutional journeys. Trócaire's partners can and should play a critical role in Trócaire's internal capacity strengthening.

- **Outcome 3:** Foment **more equitable partnerships** with local and national partners based on reciprocal accountability.

This involves both evolving Trócaire's approach to partnership, as well as strengthening relationships with partners through open and honest dialogue, stronger feedback mechanisms, and opportunities for partners to participate in Trócaire's governance structures.

- **Outcome 4:** Support local and national partners to access increased quantity and quality of **funding and resources** from Trócaire and other sources.

This involves supporting partners to access greater direct funding and increased resources, including greater cost recovery, to ensure their operational and institutional needs are met. This also includes support for progressing Trócaire's commitments to increased transparency of development and humanitarian resources.

Trócaire believes that a systematic approach to actions under these four areas will deliver transformative change for our civil society partners in the Global South.

## The Global Hub on Partnership & Localisation

Trócaire's Global Hub on Partnership & Localisation, based in Nairobi, is the main structure that will help drive the organisational

step change from partnership to localisation. The Hub has a global mandate and supports Trócaire teams, including Head Office and Country Offices, around the world.

The Hub delivers across five key functions:

- **Strategic Thinking on Partnership and Localisation:** This involves the development and review of organisational policies, strategies, and approaches relating to partnership and localisation. The Hub influences organisational decision-making that will advance our and our partners' progress on localisation.
- **Technical Support and Engagement with Country Offices, Portfolios, and Teams:** This involves the design, implementation, and monitoring of projects relating to partnership and localisation. While most projects are undertaken at Country Office level, they can also be undertaken by Head Office. Projects are designed across the four outcomes of the theory of change.
- **Networking, Advocacy, and Strategic Relationship Building:** The Hub networks with other stakeholders who are committed to localisation and is actively involved in key networks and spaces at national, regional, and global levels. The Hub aims to influence these spaces and facilitate the participation of our partners, wherever possible.
- **Research and Learning:** Research is central to the work of the Hub. Our research explores a variety of areas relating to partnership and localisation, including situational analyses, power analyses, lessons learned from better practice models, and needs and gaps analyses, among other areas. Research is designed and undertaken with the active participation of our partners, with knowledge disseminated across our networks. Research findings will be used to lobby and advocate for greater progress on localisation.



Ahmed Ibrahim Abdi, Chief Executive Officer of Arid Lands Development Focus (ALDEF) and Chair of the Kenya Charter for Change Working Group, presenting during the annual localisation dialogue on 3rd November 2021. Photo: Dan Gikeno

- **Accountability:** The Hub is accountable to our donors, supporters of Trócaire, our partners, and, ultimately, the communities and people we serve. The Hub ensures that partners and communities have opportunities to provide feedback on our work. The Hub also measures organisational progress on partnership and localisation over time.

While the Hub will help lead the organisational shift toward localisation, this initiative is a collective effort that requires the time, commitment, resources, and innovation of all Trócaire teams, internationally and in Ireland.

## How to Be Leaders in Localisation in our Country Offices

Country Offices can use the Partnership and Localisation Strategy as a guide and framework for their work on localisation. Country Offices should be cognisant of localisation principles throughout the programme cycle and consider

how they can apply these principles in the design of new projects and programmes. Localisation can take varied forms, and Country Offices may find themselves working across the four areas of the localisation framework or specialising in a specific area or areas. This strategy provides ideas and indicators for how to design localisation programming that is appropriate for diverse contexts and informed by the partners with whom the Country Offices work. These ideas and indicators are guided by the eight commitments in the Charter for Change (C4C) and informed by relevant commitments in the Grand Bargain.

Country Offices can work proactively with the Global Hub on Partnership & Localisation to articulate their commitments to partnership and localisation in their Country Strategic Plans, develop action plans, and deliver on these plans. Collaborating with the Hub, Country Offices can identify which initiatives they can lead on with their own programme funding, based on partners' expressed needs, or where the Hub can support to help complement the Country Offices

and partners' ongoing efforts. Country Offices can avail of the support and advisory functions of the Hub to strengthen their commitments to localisation and evolve their work over time.

The Hub, in line with its reporting obligations against Trócaire's global commitments, will assess Trócaire's progress on localisation on an annual basis and offer recommendations to further strengthen its work with partners. Country Offices can support in the information gathering process and implementation of recommendations that arise from any such reports.

## How to be Leaders in Localisation at Head Office

While most Head Office-based teams do not hold direct relationships with partners, there are several ways that they can support the step change toward localisation.

Like the Country Offices, Head Office-based teams can review their work from the perspectives of local partners and the lens of localisation and ensure that localisation is built into their strategies. For example, this may affect the way the communications and marketing teams develop content and attribute work to local partners, or how the human resources team develops policies in line with the principles of localisation. Likewise, this may influence how the finance team calculates funding percentages to partners and reports on this globally, or how the programmes team designs and undertakes thematic capacity strengthening initiatives. Teams can create an action plan with indicators that allow them to track progress against their own localisation commitments.

Another area that Head Office-based teams can explore is sharing knowledge, resources, and tools with our partners, if this is in line with partners' expressed needs. Examples of such knowledge sharing have already been undertaken in areas such as safeguarding, procurement, and security, and there is potential for further knowledge sharing in the future.

Regardless of location, all Trócaire staff should have an elevated level of understanding of Trócaire's approach to partnership, localisation, and the concepts included within this strategy. Managers should ensure that all staff are inducted on these concepts, with support from the Global Hub.

With high performing teams that understand what localisation is and how they can play a role in advancing it, the entire organisation will be able to progress collectively on this strategic shift.

## Sustainability

Trócaire will aim to achieve sustainability in its partnership and localisation efforts by building relevant initiatives into project and programme proposals at Country Office and Head Office levels and by seeking additional institutional funding to support the work of the Global Hub on Partnership & Localisation. Also, by establishing itself as a known expert on partnership with a demonstrated strategic commitment to localisation, Trócaire can package and deliver its specialist services externally to other INGOs, donors, UN agencies, and governments.



Sharon Ikimat on her way to collect water near Kepese, Turkana, Northern Kenya. Photo: Garry Walsh.

## PART 2: STRATEGIES FOR EACH OUTCOME



Yaka Lucia with her baby Rosa in Palabek refugee camp in Uganda. Yaka is a refugee who fled from South Sudan's civil war. Trócaire and its partner African Women Rising supported people in Palabek to grow crops to provide food and income. Photo: Sarah Fretwell / Trócaire

This section explores the four core areas of Trócaire's localisation framework in greater detail. Each sub-section provides an overview of the outcome area, situating it within recent discourse on localisation. The sections also explore what Trócaire aims to achieve under each outcome, how it will achieve its goals, who our work will support, and with whom we will collaborate.

### **OUTCOME 1: Voice and Influence**

The success of localisation depends on the role local actors play in a sector that has not shared power and resources with them on equitable terms. The active participation and leadership of local actors enriches and contextualises discussions and decision-making, while also benefiting these organisations in terms of access to information, visibility, and potential funding opportunities.

While there is acknowledgement of the role of local and national actors within the development and humanitarian sector, they remain underrepresented

in key coordination and decision-making spaces<sup>1</sup> at national level. At a sub-national level, local coordination mechanisms are often overlooked by international actors, and parallel structures can emerge. This undermines resource allocations and longer-term sustainability. Consequently, local actors have less space and potential to influence large-scale emergency responses, as well as policies and practises that affect them and their communities.

Ensuring that local actors not only have a seat at the table, but also that they can influence the agenda and decision-making, requires international actors to cede space and power. Even while ceding space, Trócaire can assume an advocacy and lobbying role to support greater

<sup>1</sup> These spaces can originate across the Triple Nexus and include those that involve advocacy, dialogue, or coordination. Thematic or sectoral spaces can be included, provided coordination or decision-making is undertaken. While the spaces do not have to be limited only to the concept of localisation, they may have an explicit focus on localisation, or elements of localisation may feature as part of their work.

voice and influence of civil society within key spaces. Simultaneously, Trócaire can provide technical advice to local actors on the functioning of such spaces.

Trócaire can deepen its advocacy engagements on localisation at country level and globally, ensuring the topic remains a priority within the sector and with donors. At the same time, Trócaire can continue to support actors from the Global South to ensure their views are heard and their challenges acknowledged and understood.

### What we are aiming to achieve

Under this outcome, Trócaire aims to **increase voice and influence of local and national partners in key spaces nationally and internationally**. Trócaire will facilitate local actors to actively participate in coordination and decision-making spaces, acquire agency and leadership in these spaces, and influence policies and practices within the sector.

### How we will achieve it

In promoting the voice and influence of local and national actors, Trócaire will pursue the following activities, in close collaboration with its civil society partners:

- **Map key coordination and decision-making spaces at various levels (sub-national, national, regional and/or global)**

This will involve mapping relevant coordination and decision-making spaces across the humanitarian-development-peace nexus. These spaces are considered broadly and may include those that have a mandate or interest in advancing localisation commitments (such as Charter for Change Working Groups) as well as those that are thematic or sectoral in nature.

- **Assessment of coordination and decision-making spaces at sub-national, national, regional, and/or global level**

Once the relevant coordination and decision-making spaces are identified, they can be assessed for their levels of inclusivity, participation, and leadership of local actors,

the results of which can be used for future advocacy. Trócaire can advocate, where relevant, for INGOs to cede space to local actors (for example, advocating for certain leadership positions to be open only to local actors).

- **Technical support to partners to maximise participation in coordination and decision-making spaces**

To ensure that local partners maximise their experience with and contributions to coordination and decision-making spaces, Trócaire can provide technical advice and guidance on how certain spaces function and how to influence change. This support will be flexible and customised to partners' expressed needs, and it may be adapted over time as the partners' needs evolve. It may also include covering partners' traveling costs to participate in spaces regionally or globally.

- **Establish and/or support networks or platforms where relevant and needed**

Trócaire may support existing networks or platforms or, where relevant, support the creation and operation of new structures. Examples of structures that are focussed on localisation include in-country Charter for Change working groups, which are comprised of INGO signatories and LNNGO endorser agencies. Trócaire may also support structures that are yet to be established, including the Grand Bargain National Reference Groups. Trócaire may also consider supporting thematic groups or clusters (for example, SGBV Cluster Groups), depending on the nature of the network or platform.

- **Conduct and/or support advocacy activities on localisation (by Trócaire, partners and/or working groups or platforms)**

Advocacy activities can be undertaken or supported at various levels. There may be opportunities where it is appropriate for Trócaire to lead advocacy efforts, such as advocating for greater inclusion of local actors in spaces that have been dominated

by international agencies or ensuring that localisation remains a priority for donors. Trócaire and its local partners may also co-lead on advocacy efforts, where relevant. Further, Trócaire may support the advocacy initiatives rising from shared platforms or networks focussed on localisation (such as Charter for Change working groups and civil society networks). This can include funding evidence-based learning on localisation and assessments of better practices within the sector. Trócaire can leverage existing resources, including the Trócaire Advocacy Manual, to track progress against any advocacy work undertaken.

- **Promote visibility of local partners in external communications and donor reports**

It is vital that Trócaire attributes credit to our partners wherever possible. Trócaire can contribute to the increased voice and influence of our local partners by increasing their visibility in our external communications (including media, articles, blogs, and published reports), as well as in all donor reports. Where possible, Trócaire should not only refer to partners but enable their voices to be heard in communications, publications, and reports. Such efforts must always consider potential risks that increased visibility will bring to our partners, and it is important to ensure that partners approve of when and how their thoughts, work, and voices are being shared with others.

### Who our work will support

Under this outcome, we will support civil society networks and platforms, particularly those that are locally led. These may include but are not limited to thematic networks or groups, clusters, in-country Charter for Change Working Groups, Grand Bargain National Reference Groups, and claimed spaces run by local and national actors. We will also support local and national actors with participation and leadership in coordination and decision-making spaces.

### Who we will collaborate with

Trócaire will collaborate with global or regional civil society networks, LNNGOs, INGOs, donors, government authorities, and regional or international agencies across the humanitarian-development-peace nexus. Examples include the Network for Empowered Aid Response (NEAR), Caritas Internationalis, the C4C Secretariat, the Grand Bargain Secretariat, and UN agencies.

## OUTCOME 2: Capacity Strengthening

Capacity strengthening has been a core focus of Trócaire's work over the past 50 years, with local partners valuing the differentiated types of support they have received. In Trócaire's 2020 Global Keystone Survey, 191 partners from around the world highlighted financial and programmatic areas as the highest-ranking capacity strengthening supports received. Areas that did not score as highly included organisational development and sustainability beyond project funding cycles.

Trócaire understands that the phrase *capacity building* is problematic, given that it wrongly implies a lack of existing local capacities.<sup>2</sup> Further, capacity assessments undertaken by donors and international NGOs can be experienced by local actors as top-down, hierarchical processes. For these reasons, Trócaire embraces the concepts of mutual capacity strengthening and capacity sharing, understanding that all organisations (including INGOs) are on journeys of growth, and we all have knowledge, skills, and experiences to teach and share with one another.

Trócaire understands the importance of listening to our partners and adapting our efforts to respond to their expressed needs. We also recognise that as an agency, we can do more to improve how we structure and provide capacity strengthening supports to add greater value to our partners' work and ensure these processes are locally owned and driven. Further, Trócaire can be more intentional about opening opportunities for partners to strengthen our capacities and ways of working as an INGO operating in their geographic and cultural contexts.

<sup>2</sup> See Peace Direct. *Time to Decolonise Aid* (2021). <https://www.peacedirect.org/publications/timetodecoloniseaid/>

## What we are aiming to achieve

Under this outcome, Trócaire aims to **provide more effective capacity strengthening support for our local and national partners and more opportunities for two-way capacity strengthening**. By doing so, we will provide more appropriate, innovative, and tailored services to our local partners, and we will constantly challenge ourselves to improve our ways of working based on partners' feedback.

## How we will achieve it

To provide more effective capacity strengthening support, Trócaire will undertake the following initiatives during the period of this strategy.

- **Review and improve our existing capacity strengthening approach**

This will involve understanding if our organisational capacity assessment approach is fit for purpose and will identify any weaknesses or challenges to be addressed. We will consult partners for feedback on our existing system and advice for improvements, and we will also collaborate with peer agencies to harmonise tools where possible and avoid duplication of efforts that absorb partners' time and resources. We will refine tools and support training of all Country Office teams on the rollout of new resources and facilitate learning sessions to share experiences on their use.

- **Development of capacity strengthening tools, guidance, resources, and approaches & training of Trócaire staff**

Beyond assessments, various tools and resources will be developed on an ongoing basis to support partners' organisational capacity strengthening needs. All Trócaire staff with a mandate to support capacity strengthening will be trained on these tools and resources and provided with appropriate guidance. Trócaire will also provide guidance to Country Offices to ensure that core costs (institutional or administrative costs) are built effectively into all projects and programmes and that organisational development/capacity strengthening lines are included in partner

budgets. The training needs of Trócaire staff will be identified on an ongoing basis, with the goal of enhancing the capacity strengthening supports received by partners. Tools, resources, and guidance can also be developed for partners to assess and provide feedback on Trócaire's capacity.

- **Pilot initiatives at country level to support specific and contextual capacity strengthening needs**

The experiences and needs of partners vary depending on organisational size, type, and the context of their work. For this reason, Trócaire will invest in specific and contextualised capacity strengthening efforts across the countries where we work to respond to partners' expressed needs on an ongoing basis. Examples of this may include supporting partners to strengthen their administrative capacities in the face of closing civil society space; supporting partners to strengthen their security capacities and infrastructure in fragile and conflict-affected contexts where security risks are high; institutional trainings for partners; and capacity strengthening initiatives that are led, driven, and delivered by local actors. Innovative ideas and approaches are encouraged, and Trócaire commits to support such initiatives in a manner that complements ongoing projects and programmes as well as longer-term organisational viability.

- **Establish external learning platform to share tools, resources, and trainings with partners**

Over the years, Trócaire has generated a significant amount of in-house knowledge and training resources. However, Trócaire currently does not have an external virtual training platform that can be accessed by our local partners. The establishment of such a platform will allow Trócaire to maximise the use of current and future resources and ensure that these can be cascaded to our local partners more efficiently.

- **Package and market expertise on partnership and localisation to external actors**

Trócaire can define the expert services in partnership and localisation that it can provide to other agencies, including INGOs, donors, UN agencies, and government. Trócaire, through the Global Hub on Partnership & Localisation, can be contracted for specific services, thus promoting sustainability while influencing the sector at large.

### Who our work will support

Work under this outcome will support Trócaire's partners (CSOs, LNNGOs, platforms, and networks), as well as its staff in Country Offices and Head Office, particularly those involved in capacity strengthening activities. External agencies (INGOs, donors, UN agencies, and government) may also benefit from Trócaire's knowledge and expertise.

### Who we will collaborate with

Under this outcome, we will collaborate with peer agencies and networks of agencies that are committed to capacity strengthening. This includes but is not limited to the Charter for Change Capacity Strengthening Working Group. We will also collaborate with entities that run external learning platforms to cascade capacity strengthening efforts in a more innovative manner.

## OUTCOME 3: Quality of Partnership

INGOs like Trócaire that work in partnership have traditionally played the role of intermediary agencies that bridge donors and supporters from the Global North with local and national organisations implementing programmes in the Global South. In the process, INGOs undertake specific responsibilities, such as providing technical expertise and support, conducting monitoring and evaluation, providing capacity strengthening, ensuring donor compliance and reporting, overseeing project and programme design, and assuming the financial risk linked to project implementation. Over the last few years, the discourse on localisation has questioned the

role of intermediaries, as partnerships can often be unequal, transactional, and disempowering for local and national actors.

INGOs have been challenged for taking a sub-contractor approach, wherein they engage LNNGOs on short-term, project-based contracts, posing significant challenges to their financial sustainability and long-term organisational development. The terms of these partnerships are often set by the INGOs, which results in an inherent imbalance of power between INGOs and LNNGOs. Additionally, there are limited opportunities and mechanisms for local and national organisations to hold larger international actors to account within such arrangements.

Trócaire understands that the localisation discourse challenges international actors to move away from such transactional approaches and build partnerships that facilitate strong, locally led response and development. Previous studies and Trócaire's Keystone survey results have shown that our partners value the quality of their relationship with Trócaire, which they characterise as one of *"trust, mutuality, complementarity and shared ownership"*<sup>3</sup>. Trócaire is committed to enhancing the quality of these relationships further through a range of actions aimed at ensuring equitable, complementary, and mutually accountable partnerships.

### What we are aiming to achieve

Under this outcome, Trócaire aims to ensure **equitable partnerships with local and national actors, based on mutuality, respect, and reciprocal accountability**. Trócaire acknowledges the power imbalance inherent in partnerships between international and local and national actors and aims to address this by ensuring partners can meaningfully engage with and influence Trócaire's work.

<sup>3</sup> See Partnership in Practice: Steps to Localisation (2019): [https://www.trocaire.org/sites/default/files/resources/policy/partnership\\_in\\_practice\\_-\\_steps\\_to\\_localisation\\_web.pdf](https://www.trocaire.org/sites/default/files/resources/policy/partnership_in_practice_-_steps_to_localisation_web.pdf)





Trócaire's partner SAWA, in Lebanon, supports refugee children like Maya (right) to meet with social workers in safe spaces.  
Photo: Simon Walsh

### How we will achieve it

Trócaire will undertake the following to improve the quality of our partner relationships during the period of this strategy:

- **Ensure partnerships are long-term, strategic, and rooted in the Principles of Partnership**

Trócaire will undertake a review of all internal policies and guidance on partnership to ensure they are aligned with the Principles of Partnership (Equality, Transparency, Results-Oriented Approach, Responsibility, and Complementarity). Partnership agreements and Memoranda of Understanding (MoUs) will be developed based on mutually agreed and long-term strategic goals and principles, as well as mutual understanding of the responsibility to adhere to the MoUs.

- **Greater power and decision-making ability for partners in Trócaire's work**

Trócaire will actively support increased partner engagement in our governance and

decision-making processes. We will establish avenues for partners to hold Trócaire to account by providing regular feedback or raising concerns regarding the partnership. Trócaire will ensure that partners' feedback is meaningfully engaged with and acted upon at the organisational and country level.

- **Ensure that there is a leading role for partners and communities throughout the programme cycle**

Trócaire is committed to ensuring that we do not engage with local and national organisations in a sub-contracting relationship. We will work closely with our partners and the communities they serve to ensure they have a leading role in decision-making throughout the programme cycle, including planning, designing, implementing, and monitoring projects. This will involve collaborating with partners to develop a shared understanding of what leadership throughout the programme cycle looks like in practice and how Trócaire's current approach can be improved.

- **Building staff awareness and skills to enable effective implementation of localisation commitments**

Trócaire acknowledges that making the shift from partnership to localisation will require all staff to have the necessary awareness, knowledge, and skills for working effectively in partnership. We are committed to creating opportunities for all staff to deepen their understanding of localisation and to build the necessary skills to apply this in practice.

### Who our work will support

Trócaire's work under this outcome will primarily support our local and national partner organisations across all the countries that Trócaire operates in. It will also support Trócaire staff across all Country Offices and Head Office teams to implement the shift to localisation more effectively in their practice, which will in turn enhance the ability of our partners and the communities participating in our programmes to engage with Trócaire on more equitable terms.

### Who we will collaborate with

In addition to working with our partner organisations, we will engage with leading practitioner voices on localisation, particularly those from the Global South, including networks such as NEAR, C4C, and individual LNNGOs. We will look to research organisations, think tanks, and independent researchers working on localisation such as the Humanitarian Advisory Group, Active Learning Network for Accountability and Performance (ALNAP), and others to deepen our knowledge and assess our work. We will continue to engage with neutral third parties who facilitate constructive engagement and feedback from partners, such as Keystone Accountability, and we will engage entities (such as Partnership Brokers Association) that can help strengthen Trócaire's internal capacities to build and engage in better and more equitable partnerships.

## OUTCOME 4: Funding and Resources

Historically, local and national actors have received a disproportionately small share of the total funding in the humanitarian and development system,

despite their long-term presence and frontline work in the communities at the centre of response and development activities. The quality of funding to LNNGOs has also been restrictive, as it is frequently short-term, inflexible, and project based. This poses a major challenge to their ability to invest in organisational development, as well as their longer-term financial viability and sustainability.

LNNGOs have limited opportunities to access direct funding, with most resources being channelled through intermediary organisations that retain portions of the funds for their own costs. This also results in LNNGOs shouldering a greater amount of risk to their institutional sustainability, as intermediary organisations have traditionally not shared indirect and core costs with their local and national partners, who struggle to recover overhead costs through project funding.

Where direct funding opportunities are available, LNNGOs struggle to access them due to structural barriers such as grant conditions that require pre-financing or matching contributions, rigorous needs assessments and due diligence processes in preparation of grant proposals, and onerous compliance requirements. They frequently compete against international actors who have a larger pool of financial and staffing resources as well as relevant technical expertise for proposal development and grant management.

Key localisation instruments such as the Grand Bargain and Charter for Change have sought to address this imbalance. This includes the Grand Bargain commitment to share 25 percent of humanitarian funding to LNNGOs as directly as possible. In practice, Trócaire shares a much higher percentage of our humanitarian funding directly with our partners and is committed to maintaining this in the future. Trócaire understands the importance of increasing both the quantity and quality of resources available to LNNGOs for them to develop into robust and sustainable organisations.

### What we are aiming to achieve

Under this outcome, Trócaire aims to ensure that **local and national partners receive increased quantity and quality of funding and resources** from Trócaire and other sources. We are committed

to a more equitable sharing of resources with our partners and supporting them to access increased direct funding.

### How we will achieve it

Trócaire will undertake the following to increase the level of funding and resources to local and national partners during the period of this strategy:

- **Track the percentage of programme funding that is shared directly with partners**

Trócaire is committed to ensuring that a significant percentage of our programme funding constitutes direct transfers to our local and national partners, across our humanitarian, development, and peacebuilding work. In practice, Trócaire's percentage contributions to partners are much higher than what is required by the Charter for Change and Grand Bargain; however, we want to ensure that we continue this practice and that our commitment applies across the Triple Nexus.

- **More equitable sharing of indirect and core costs by Trócaire**

Trócaire understands the importance of sharing indirect and core costs with partners equitably, even if this results in a net income loss for ourselves. Over the course of this strategy, Trócaire will develop and implement an organisational policy to this effect. We will also review our existing partnerships to ensure we are supporting our partners with flexible and long-term funding that enables them to recover costs more fully and increases their organisational resources.

- **Support partners to access direct funding**

Trócaire is committed to ensuring that partners can access increased direct funding through a variety of channels. We will embrace partner-led funding models where possible and learn from these experiences to inform similar transitions in more of our operational contexts. We will also support partners to enhance their capacities to develop proposals and meet compliance requirements. Where possible, Trócaire will support partners with proposal development to access external funding,

particularly when Trócaire is a co-applicant to local partners. We will look to facilitate direct relationships between our partners and donors and engage in evidence-based advocacy to increase the direct funding opportunities available to local and national organisations.

In relation to activities that increase partners' capacity to mobilise resources (such as trainings or the development of resource mobilisation strategies), there is a conceptual overlap with Outcome 2 (capacity strengthening). However, for the purposes of this strategy, any activities relating to enhancing partners' resource mobilisation capacities can be considered under Outcome 4.

- **Develop an organisational approach to in-country funding opportunities open to LNNGOs**

Trócaire acknowledges the importance of engaging responsibly with in-country funding opportunities open to LNNGOs so that our actions are in line with our localisation commitments. We will undertake an analysis and critical review of our decision-making framework for such opportunities to ensure that we are complementing, and not competing with, local and national organisations in the countries that we operate in.

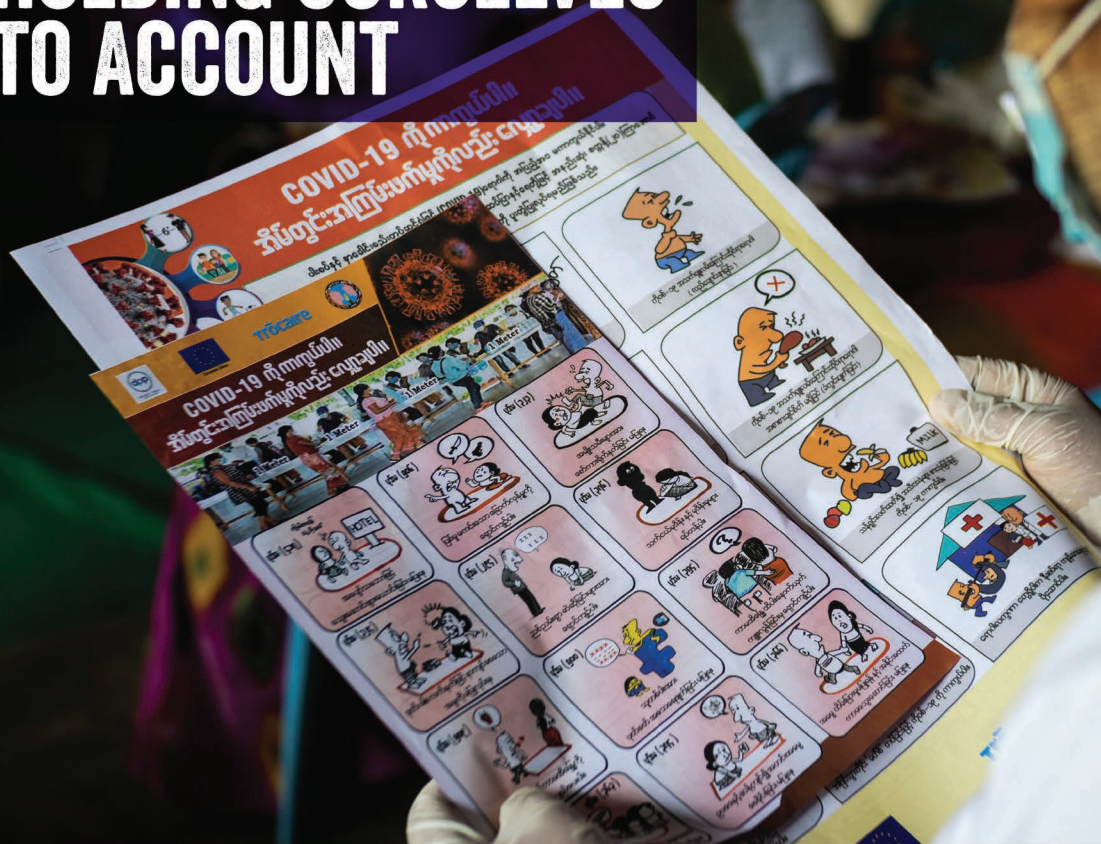
### Who our work will support

Trócaire's work under this outcome will primarily support local and national organisations and networks to access increased funding and resources. It will also support Trócaire staff in Country Offices involved in relevant decision-making and partner support roles to adapt their practice in line with Trócaire's commitment to localisation.

### Who we will collaborate with

Various teams and units across Trócaire will be engaged, including Finance, the Global Partnership and Funding Unit, and Standards & Compliance. Trócaire will collaborate with peer agencies and networks (including the C4C) to understand and learn from their approaches, as well as to share learning across the sector. We will also engage with donors as key stakeholders in this process.

# PART 3: HOLDING OURSELVES TO ACCOUNT



Information pamphlets on preventing the spread of Covid-19 and preventing gender-based violence. Gaw Set Yang village, Waimaw Township, Kachin state, Myanmar. Photo: Ring Nu Awng / RANIR

This section focuses on how Trócaire can be a more accountable agency as we take forward our work on partnership and localisation. It explores ways of increasing partners' participation, as well as ways of measuring and tracking progress against the goals outlined in the strategy.

## Partner Advisory Group on Localisation

It is important for our partners to be regularly informed about Trócaire's progress on localisation and to have opportunities to influence our work at a strategic level. For this reason, a Partner Advisory Group on Localisation will be established with a cross-section of our partners from around the world. This group will engage directly with Trócaire's Global Hub on Partnership & Localisation on a periodic basis and have opportunities to influence Trócaire's work on localisation.

## Knowledge Management and Measuring Progress

Trócaire is committed to measuring progress against its localisation commitments and ambitions, as this will enable us to understand if and how changes are occurring over time. Broad localisation frameworks exist for international agreements such as the Grand Bargain and the Charter for Change. As a signatory of the Charter for Change, Trócaire is required to self-report on progress annually at the Country Office and Head Office levels. Trócaire will engage in a similar annual reporting process once it signs the Grand Bargain 2.0. Trócaire is also required to report on progress to its individual donors. Beyond these commitments, Trócaire seeks to hold itself to account by learning from our global achievements and shortfalls and challenging ourselves to perform to the best of our ability.

Trócaire has established a possible menu of high-level indicators for measuring progress on localisation. The Global Hub on Partnership & Localisation, Trócaire Country Offices, and Head Office teams can work with these indicators to hold ourselves to account to our localisation commitments. These indicators are meant to be explored, tested, and revised over time. Trócaire recognises that the localisation discourse is constantly evolving and that our ways of measuring progress must also evolve to respond to changing priorities and realities.

The results of any data collected against these indicators, as well as data collected from annual reporting exercises, will be shared internally within Trócaire and externally with partners, donors, and other stakeholders. Achievements and successes will be highlighted, and any challenges will be further explored to ensure continual progress and improvement.

## Measuring Progress: Menu of High-level Indicators

Area	Indicators	Responsible
<b>Organisational Level</b>	<b>O.1</b> Evidence of Trócaire signing onto the Grand Bargain 2.0	Global Hub
	<b>O.2</b> Trócaire continues to improve its performance on localisation, as tracked by the Charter 4 Change, Grand Bargain, and partner feedback	Global Hub & Country Offices
	<b>O.3</b> Level of partners' satisfaction concerning Trócaire's overall value addition to their work	Global Hub & Country Offices
<b>Outcome 1: Voice and Influence</b>	<b>1.1</b> Evidence of changes in partners' participation in coordination or decision-making spaces	Country Offices
	<b>1.2</b> Evidence of partners' increased leadership and/or influence in coordination or decision-making spaces	Country Offices
<b>Outcome 2: Capacity Strengthening</b>	<b>2.1</b> Evidence of an improved capacity strengthening approach in place that services the organisation and partners	Global Hub
	<b>2.2</b> Level of partners' satisfaction with Trócaire's capacity strengthening approaches or efforts	Global Hub & Country Offices
	<b>2.3</b> Evidence of increased organisational resilience among partners	Country Offices
<b>Outcome 3: Partnership Quality</b>	<b>3.1</b> Evidence of partners influencing Trócaire's decision-making at country or organisational/governance level	Global Hub, Head Office & Country Offices
	<b>3.2</b> Partners' perception of their ability to influence decisions relevant to them throughout the programme/project cycle	Global Hub & Country Offices
<b>Outcome 4: Funding and Resources</b>	<b>4.1</b> % of Trócaire's programme funding that is allocated to partners annually (Development & Humanitarian)	Finance
	<b>4.2</b> Evidence of an organisational policy in place on sharing indirect costs with partners	Finance
	<b>4.3</b> Evidence of partners applying for and/or accessing funding from external sources with Trócaire support	Country Offices

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