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LOCALIZATION

The journey towards locally led development.



Research paper submitted to the Private International Institute of Management and Technology
in fulfillment of the requirement for the master's degree in project management.

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This research paper serves as a testament to the efficacy of locally driven development, demonstrating the significant influence that cooperative efforts and a firm conviction in the importance of local groups' contributions can have in promoting significant and long-lasting development advancement.



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Confidentiality and Access Restrictions

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Acronyms

ADS	Automated Directives System
APS	Annual Program Statement
A&A	Acquisition and Assistance
AOR	Agreement Officer Representative
BPA	Blanket Purchase Agreement
COR	Contracting Officer Representative
FSN	Foreign Service Nationals
MEL	Monitoring, Evaluation and Learning
NOI	Notice of Intent
RFI	Request for Information
RFQ	Request for Quotation
SDGs	Sustainable Development Goals
TEC	Technical Evaluation Committee
USAID	United States Agency for International Development



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USAID: The Organization

On behalf of the American people, we promote and demonstrate democratic values abroad, and advance a free, peaceful, and prosperous world. In support of America's foreign policy, the U.S. Agency for International Development leads the U.S. Government's international development and disaster assistance through partnerships and investments that save lives, reduce poverty, strengthen democratic governance, and help people emerge from humanitarian crises and progress beyond assistance.

Missions

Missions execute USAID's mission in countries around the world, helping to advance U.S. national security and economic prosperity, demonstrate American generosity, and promote a path to recipient self-reliance and resilience.



Terminology

The term “local” in USAID context:

- In the context of USAID, the term "local" is employed to denote actors, organizations, and systems that are situated in and function within the specific geographic areas where USAID operates. This encompasses host-country national organizations, local civil society organizations, local private sector entities, local government entities, and local communities. The notion of "local" holds utmost significance in USAID's localization agenda.

Local entity:

- As defined in [ADS 303](#), Section 7077 of Public Law 112-74, the Consolidated Appropriations Act, 2012 (P.L. 112-74), as amended by Section 7028 of the Consolidated Appropriations Act, 2014 (P.L. 113-76), and included by reference in subsequent appropriations acts, local entity means an individual, a corporation, a nonprofit organization, or another body of persons that—
 - (1) is legally organized under the laws of; (2) has as its principal place of business or operations in;
 - (2) has as its principal place of business or operations in;
 - (3) is
 - (A) majority owned by individuals who are citizens or lawful permanent residents of; and
 - (B) managed by a governing body the majority of who are citizens or lawful permanent residents of a country receiving assistance.

Local Works Program:

- The Local Works program was launched in 2016 and provides five-year discretionary funding for USAID Missions to work directly with local and non-traditional partners. It aims to support local ownership of the development process, with a focus on co-development of context-specific interventions with local actors. The program provides funding, flexibility, and technical support needed to work directly with local actors, engaging them in various ways, such as holding intentional, open, and respectful dialogues about their experiences and priorities.

Locally Led Development:

- Locally led development is the process in which local actors – encompassing individuals, communities, networks, organizations, private entities, and governments – set their own agendas, develop solutions, and bring the capacity, leadership, and resources to make those solutions a reality. USAID recognizes that local leadership and ownership are essential for fostering sustainable results across our development and humanitarian assistance work.



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Local systems:

- [Local systems](#) is the lens we use to understand development results and suggest interventions to achieve sustainability. Improving development and humanitarian results requires strengthening system performance by developing local capacities, deepening interrelationships between local actors, improving equity, and aligning the incentives that shape the system. Making those gains sustainable occurs only when local actors own, value and invest in those changes.

Local capacity development:

- Local capacity development is a set of programmatic approaches focused on strengthening systemic performance and enhancing locally led development by supporting local actors to achieve their own mission, to take action to design and implement equitable responses to local challenges, to learn and adapt, and to innovate and transform over time.

Capacity-building:

- Much of the focus on capacity building is on ensuring local actors' ability to meet international standards—particularly in terms of administrative, accounting, and compliance procedures. “Capacity” is thus defined by what the international partner or donor needs rather than the priorities of the local partners or the needs of the people they serve. This underscores the criticism that localization is a form of “isomorphism” or ensuring that local organizations become more like their international counterparts, which may undermine local forms of action and accountability. In addition, capacity building tends to be short-term, project-based, and designed as “one-off” trainings, which are frequently not seen as actually building towards local leadership. Further, there is little consideration of “capacity building” that local actors provide to external partners about issues such as social dynamics, cultural sensitivity, political processes, etc.

Sustainability:

- The ability of a local system, network, or institutions to produce desired outcomes over time. Programs contribute to sustainability when they strengthen the ability to produce valued results and to be both resilient and adaptive in the face of changing circumstances.

Blanket Purchase Agreement

- A BPA is a simplified method of procuring recurring services from qualified vendors called BPA Holders. BPA Holders are selected through a competitive process and are then eligible to respond to BPA Call Orders that request quotations for a specific scope of services.



Executive summary

USAID Localization: The Journey towards Locally Led Development

Setting the scene

In the global arena, USAID has been a leader in advancing development and humanitarian aid. It has always been important in directing and carrying out development initiatives in many nations. But as time has gone on, the significance of local ownership and leadership in development initiatives has come to be understood more and more. This move toward locally driven development is consistent with international accords and dialogues, like the Accra Agenda for Action and the Busan Partnership for Effective Development Cooperation. Stronger alliances, more country ownership, and inclusive development are all stressed by these international programs. Thus, in the larger framework of these international agreements, the idea of USAID localization has arisen, indicating a revolutionary shift toward more cooperative and locally-driven development methods.

The literature review will look at international projects and debates over localization. It will also look at other international conventions and agreements that have suggested a major shift in the way the international development community approaches encouraging localization in development initiatives. The goal of this study is to provide readers a thorough grasp of the state of global development practices and the emerging trend of locally driven development.

According to USAID, localization is the collection of internal policies, procedures, and behavioral adjustments we make to guarantee that our work empowers local actors, fortifies local institutions, and is community responsive. The goal of USAID localization is to enable and strengthen local actors' ability to direct development processes. It acknowledges that local communities have a profound awareness of their own needs, goals, and situational difficulties.

USAID may support development projects customized to local settings by integrating people in decision-making and execution, resulting in more meaningful and sustainable outcomes. Localization is a trend that improves development projects' efficacy and efficiency while fortifying local institutions and encouraging self-sufficiency and long-term resilience.

For USAID, establishing alliances with regional authorities and organizations is a fundamental component of localization efforts. This entails collaborating with local players to take use of their resources, knowledge, and skills. Examples of these actors include civil society organizations, community-based organizations, and local governing institutions.

Through financial support, technical assistance, and capacity building, USAID helps local partners so they may take the lead in creating and carrying out development projects. By doing this, USAID localization contributes to the formation of an environment that is favorable for local actors to actively engage in and contribute to their own development, resulting in locally driven and sustainable outcomes.

Localizing USAID programs has some difficulties, like balancing local accountability and ownership, guaranteeing fair participation and representation, and addressing power structures in communities.



Nonetheless, USAID can bolster its localization initiatives and advance a more inclusive and fair development process by aggressively addressing these issues. In the end, USAID localization signifies a paradigm change toward empowerment, self-determination, and cooperation; it opens the door for locally driven development that is sensitive to the many needs and goals of communities everywhere.

In order to achieve locally driven development, the USAID localization process is examined in this research paper along with how it relates to strategic management ideas. In the context of foreign aid, the move to locally driven development represents a paradigm change, and it is critical to understand how it relates to strategic management.

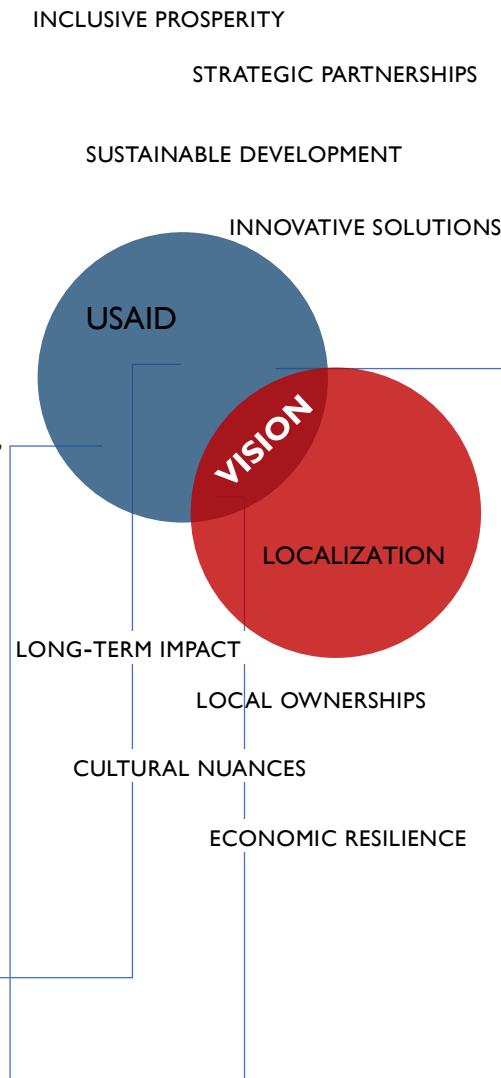
USAID Vision, Localization Vision: Where do they meet?

USAID

USAID's global issues, poverty reduction, and sustainable development are usually at the center of its overarching vision. USAID seeks to advance democratic government, promote sustainable economic growth, and raise global standards of living. Through deliberate investments in a range of areas, including infrastructure, agriculture, health, and education, USAID aims to make a lasting difference and enable people to live healthy, fulfilling lives. By means of collaborations with governmental bodies, civil society organizations, and the private sector, USAID endeavors to construct robust communities and promote self-reliance.

LOCALIZATION

USAID wants to increase the share of locally driven initiatives in its portfolio. This implies that in order to set priorities, create initiatives, oversee their execution, measure and assess their progress, and assume full responsibility for their work on several fronts, a varied range of local actors will be essential. Through putting local leadership first, USAID hopes to improve the efficiency and long-term viability of its programs. This method acknowledges the priceless thoughts, knowledge, and experience that local communities have to offer. Additionally, it gives these communities a sense of strength and ownership, empowering them to take an active role in determining their own destiny.





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ADAPTING POLICIES
AND PROGRAM

SHIFT POWER TO LOCAL
ACTORS

CHANNEL A LARGER
PORTION OF ASSISTANCE

SERVE AS A PUBLIC ADVOCATE
AND THOUGHT-LEADER

Research purpose, questions, and methodology.

This paper will examine the many facets of USAID localization along with its importance in promoting efficient and sustainable development.

Objectives: The main objectives of this research are to investigate and evaluate the dynamics of USAID's localization process, with a particular focus on how it relates to strategic management techniques. The goal of the research is to pinpoint important findings that can guide improving development programs.

Literature Review: This research paper was informed by a targeted analysis of the available literature rather than a thorough evaluation.

Research question: This research paper will be addressing the following question:

What part did localization play in forming USAID's strategic management? How is USAID incorporating localization into its development initiatives, highlighting the importance of local actors?

In order to address these goals, the research paper will specifically concentrate on the following strategic aspects:

- Strategic Management Frameworks
- Leadership and Change Management
- Risk Management
- Global Environment
- Ethical and Social Responsibility
- Innovation
- Financial Management
- Human Resources Management
- Strategic Partnerships

These strategic management components are essential to comprehending and assessing the localization approach as it applies to development initiatives, as demonstrated by this study on USAID's localization strategy. They were chosen especially to offer a thorough examination.

They provide us with information on how USAID makes choices, adjusts to change, controls risks, takes ethics into account, comprehends the global environment, embraces innovation, manages finances, oversees human resources, and establishes cooperative alliances. The goal of the research is to gain a



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greater knowledge of the intricacies involved in integrating localization into USAID's overall strategic management framework by analyzing these strategic aspects.

Methodology: A qualitative approach was used to thoroughly understand the connection between USAID's localization efforts and strategic management. A desk and literature review methodology was used, delving into existing academic and organizational literature, policy documents, reports, and case studies that focused on USAID's development strategies and its approach to localization.

This method allowed us to examine the theoretical foundations, practical applications, and organizational responses related to the integration of localization principles within the broader framework of strategic management.

Case Studies: To demonstrate the usefulness of the localization process, a particular case study of a USAID project carried out in collaboration with regional organizations will be examined. The main goal will be to comprehend the application of locally led principles and how they have affected this locally led initiative's success.

Challenges and Opportunities: Determining the advantages and disadvantages of the localization process. A detailed grasp of the dynamics at play will be facilitated by an examination of the relationships between these elements and strategic management techniques.

Recommendations: Taking into account the strategic management elements, the research findings will provide suggestions for improving USAID's localization initiatives.

Conclusion: In summary, this paper aims to provide readers a thorough grasp of the USAID localization process and how it relates to strategic management in the framework of locally driven development. Not only will the insights gained advance scholarly understanding, but they will also provide useful suggestions for enhancing the effectiveness and long-term viability of international development initiatives.

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If we truly want to make aid inclusive, local voices need to be at the center of everything we do.

We've got to approach this work with intention and humility...to interrogate the traditional power dynamics of donor-driven development and look for ways to amplify the local voices of those who too often have been left out of the conversation.

- Administrator Samantha Power



Part I: USAID Localization Journey

Section I: Introduction

Objective of Section I: Explain and emphasize how crucial localization is to USAID. Understanding the Change in USAID's Priorities: to elucidate the causes of the change in USAID's priorities, which may involve adjustments to the difficulties of global development. The impact of USAID's adoption of localization on its strategic management is also examined in this part, along with how it affects organizational objectives and plans.

I. What is localization and why is it important for USAID?

It is now widely acknowledged that in order to effectively address these concerns, development and humanitarian aid must be more sensitive to the objectives and needs of local actors and communities, as well as their thoughts about how best to do so. Despite their size and complexity, the world's development and humanitarian issues are essentially local in nature. In a similar vein, there are plenty of chances to address these issues locally as well.

Leaning on important lessons learned from the past, we have seen examples where empowering local leadership to decide where, how, and why we work together has produced amazing results. The impact was both more immediate and long-lasting in areas where locals took the initiative to design solutions specific to their own situation. Empowerment and ownership at the local level have been shown to be crucial for building community resilience and tackling issues with a thorough awareness of the nuances of the social, cultural, and economic landscape. This strategy establishes a standard for obtaining more equality, efficacy, and sustainability in upcoming development and humanitarian activities since it is based on the knowledge acquired from prior triumphs.

Localization refers to a comprehensive collection of internal reforms, initiatives, and behavioral changes intended to support locally driven development within the framework of the United States Agency for International Development (USAID). This includes:

- *Shifting leadership*: entails placing local players—such as community organizations, private companies, and civil society organizations—at the center of development strategy formulation, execution, and decision-making.
- *Strengthening local systems*: Investing in local institutions, governance, and capacities to successfully manage resources and implement change.
- *Promoting responsiveness*: ensuring that development initiatives are customized to the particular requirements and goals of regional communities.

Localization is the collection of internal reforms, steps, and behavioral adjustments that USAID is doing to guarantee that its work empowers local actors, fortifies local systems, and is community responsive.

USAID Strategic decision on localization is undertaking four lines of effort:



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1. **Adapting the policies and programs** to foster locally led development that is tied to each country's unique political, social, cultural, economic, and environmental conditions, including through local systems practice and local capacity strengthening;
2. **Shifting power to local actors**, including, with an inclusive development lens, those from marginalized and underrepresented groups, and promoting space for them to influence and exercise leadership over priority setting, activity design and implementation, and measuring and evaluating results;
3. **Channeling a larger portion of funding directly to local partners** while ensuring accountability for the appropriate use of funds and achievement of development and humanitarian results; and
4. **Serving as a global advocate and thought leader**, using our convening power, partnerships, voice, and other tools of development diplomacy to catalyze a broader shift toward locally led development.

Localization is not unique to USAID; rather, it fits into a larger international development trend that symbolizes the world's transition to multipolarity. Local actors and developing economies are becoming more significant players in this changing scenario. Additionally, a number of broad issues that impact the global scene have an impact on the increasing importance of localization in international development:

1. ***Multipolarity and the Rise of the South:*** As emerging economies and developing nations demonstrate their economic and political might and seek a larger involvement in development processes, the global landscape is undergoing a dramatic upheaval. This paradigm change challenges the traditional North-South assistance approach and necessitates closer coordination with local actors to guarantee successful results.
2. ***Fragile States and Complex Crises:*** The growing quantity of weak nations and humanitarian emergencies demands a flexible and situation-specific strategy. By embracing localization, we enable local communities to build resilience in the face of hardship and successfully handle the particular problems they encounter.
3. ***Increasing Demand for Ownership and Accountability:*** More than ever, communities are claiming their right to direct their own development and holding development agents accountable for producing measurable results. Local actors are empowered by localization to carry out customized interventions that successfully meet local goals and requirements. In this specific context, localization is a revolutionary strategy that empowers local actors to take charge of the whole development process in addition to implementing tailored interventions that successfully address local needs and objectives.
4. ***Embracing Technological Advancements:*** More inclusive and participatory development models are now possible because to the quick growth of digital technologies, which have transformed communication, cooperation, and information sharing between local and international players. In order to achieve sustainable development, local actors may close gaps and guarantee that all opinions are heard thanks to these state-of-the-art instruments.



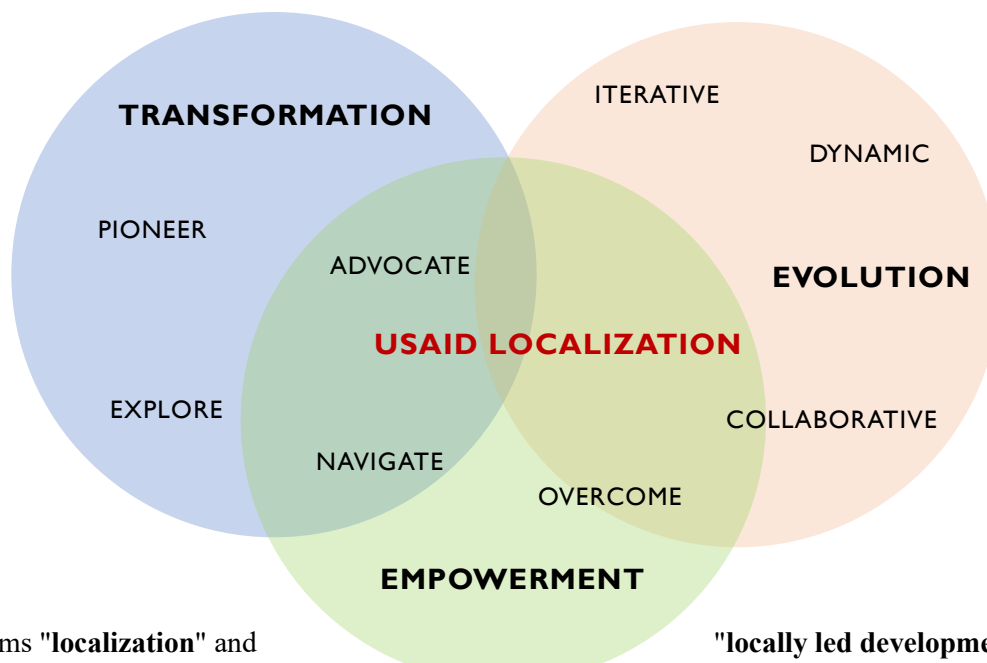
5. Local Knowledge and Innovation: Indigenous wisdom and customs provide a great deal of promise for solving development-related issues. By recognizing and utilizing these priceless resources, localization fosters inclusive and culturally relevant solutions.

6. The Grand Bargain and Humanitarian Partnerships: Improving local leadership and collaborations in humanitarian response is a key component of the Grand Bargain, a set of agreements between funders and humanitarian players. This guarantees a more efficient and long-lasting strategy by reinforcing the continuous shift towards localization.

7. The Localization Agenda: The Localization Agenda offers a framework for putting localization concepts into practice and coordinating international initiatives. It is supported by UN agencies and other development partners.

Within the context of USAID:

- **Championing Change:** Because of its dedication to localization, USAID is in a unique position to influence the development landscape and make it more inclusive and efficient.
- **Learning and Adapting:** It is imperative that development actors exchange experiences and best practices in order to continuously enhance and refine localization processes.
- **Addressing Power Dynamics:** Handling internal opposition to change and making sure local actors are truly empowered are still major issues that need constant attention and intervention.



The terms "**localization**" and "**locally led development**" are occasionally used interchangeably. Nonetheless, the following explains the primary distinctions:

- **Localization** is a multifaceted internal agency agenda-setting and change process that involves several policies, resources, projects, and programs.



- **Locally led development** is a technical approach for development that places local actors in charge of establishing priorities, carrying out solutions, and overseeing change.

The locally led development places a strong emphasis on community ownership, guaranteeing that communities have a major voice in the selection, creation, and execution of development initiatives. In **localization**, even while local actors are involved, community ownership may not always be given the same priority.

To sum up, locally driven development emphasizes the significance of communities taking the lead and owning the development process, whereas **localization** is a larger notion that entails transferring duties and decision-making authority to local bodies. **The aim of these ideas is to increase the effectiveness, sustainability, and responsiveness of development initiatives to local needs.**



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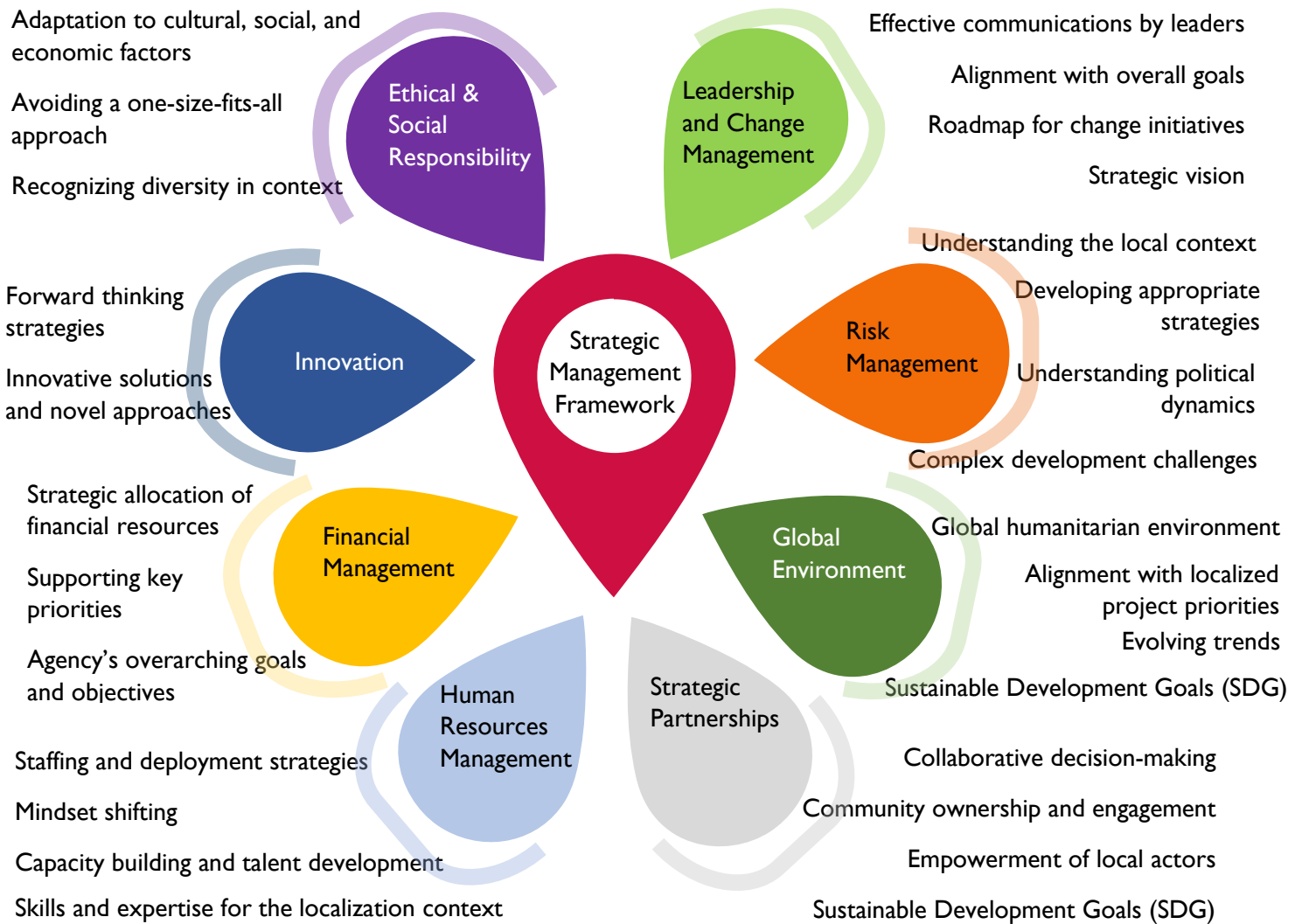


II. How does USAID's adoption of localization impact its strategic management?

The adoption of localization by USAID has had a significant impact on its strategic management in a number of ways.

Localization initiatives undertaken by USAID have a significant influence on the organization's strategic management, allowing it to better address the particular issues encountered in various settings while promoting local ownership and sustainability.

USAID's Strategic Management Framework and the Eight Dimensions of Localization



USAID STRATEGIC PIVOT: *Understanding the motive.*



Administrator Samantha Power of USAID unveiled bold intentions in November 2021 to **diversify** and **localize** the partners the organization works with. Over the following four years, the organization pledged to allocate "at least a quarter" of its money to regional partners and make sure that half of its programming puts local communities in charge of setting priorities, co-designing projects, overseeing execution, or leading program assessments.

For a number of compelling reasons, USAID has started a revolutionary path toward **localization** in its development strategy. This tactical change is in line with the emerging agreement in the international development community that more significant and long-lasting development achievements are necessary.

The use of **localization** by USAID has been motivated by a number of significant factors:

Strategic Management Frameworks: Since **localization** is essential to promoting an all-encompassing and sustainable approach to international development, it is a critical component of USAID's strategic management. **Localization** can aid in the success of USAID's initiatives through various means such as aligning with organizational objectives, being responsive to local contexts, engaging stakeholders, mitigating risks, building capacity, promoting innovation, allocating resources efficiently, ensuring accountability, and fostering partnership development. By integrating **localization** into its strategic management, USAID establishes the conditions necessary to effectively handle the particular requirements and difficulties faced by the communities it works with. USAID may customize its interventions to make sure they are pertinent and acceptable for the local context by being aware of and respectful of it. The **localization** strategy not only increases the efficacy of its initiatives but also fosters credibility and trust among local stakeholders.

1. Leadership and Change Management: Conventional assistance strategies were criticized for being hierarchical, paternalistic, and occasionally detached from the reality on the ground. Through the promotion of a more inclusive and participatory approach to development, **localization** aims to overcome these criticisms. The overarching objectives of USAID projects have to be properly matched with leadership and change management initiatives. A well-articulated and skillfully conveyed strategic vision served as a guide for transformation initiatives and **localization** endeavors.

2. Risk Management: Making strategic decisions based on a knowledge of possible risks and uncertainties is ensured by incorporating risk management into decision-making processes. Determining the local context in great detail is necessary for effective [risk management](#). In order to reduce the risks connected to international development initiatives, **localization** is essential. USAID is able to recognize possible obstacles and create effective plans of action by comprehending the local environment. By being proactive, this method reduces the possibility of project failures and guarantees effective and efficient use of resources. USAID recognizes historical, political, and cultural quirks that may present possibilities or difficulties for localization.

3. Global Humanitarian Environment: A wider tendency toward **localization** has been observed in the field of international development, as different stakeholders have come to understand the need of local ownership and leadership. USAID's decision to localize shows its dedication to keeping up with these changing trends. Localization adoption also supports larger global development initiatives, such as the [Sustainable Development Goals \(SDGs\)](#). The SDGs place a strong emphasis on the value of local cooperation and partnerships in achieving sustainable development goals.



4. Ethical and Social Responsibility: Local players are in a better position to comprehend the subtleties of the cultural, social, and economic aspects of their particular environments. By avoiding a one-size-fits-all strategy, **localization** enables more flexible and contextually relevant development interventions.

5. Innovation: In order to achieve beneficial outcomes for local communities, USAID's strategic management, which is in line with the values of flexibility, agility, and openness, takes innovations into account. USAID is creating novel strategies to tackle intricate development issues by embracing local solutions and modifying international best practices to suit local circumstances. We may accomplish more impact and sustainability when we adopt this approach, which promotes innovation, flexibility, and adaptation.

6. Financial Management: The financial management of USAID is significantly impacted strategically by the **localization** push. It means coordinating the financial procedures with the broad aims and objectives of the organization, as outlined in the [USAID strategic plan](#). The strategic deployment of financial resources to successfully support the major goals specified within the **localization** strategy is a critical component of this alignment.

Furthermore, the effects of USAID's financial management go well beyond the organization and have a significant influence on local implementing partners. The intricate financial restrictions and reporting requirements of USAID can be a source of difficulty for these partners, which can hinder the effectiveness of localization efforts.

7. Human Resources Management: The strategic consequences of **localization** for USAID's human resources entail a comprehensive strategy to improve talent development, capacity building, and cultural competency. Because of this strategy change, personnel and deployment plans must be thoroughly reevaluated in order to better match with locally defined project goals and promote cooperative decision-making and partnerships across heterogeneous teams. Agreement Officer Representatives (AORs) and other mission staff must devote a significant amount of time and energy to collaborating with an increasing number of local partners due to the challenges that come with working with local partners. These challenges include the necessity of improved communication and capacity building on many fronts.

Moreover, changes to HR rules and processes are deliberately made in order to handle hiring, performance reviews, and career advancement in a decentralized manner.

8. Strategic Partnerships: Localization facilitates USAID's interaction with many stakeholders such as community leaders, civil society groups, and local governments. We can take use of their networks, local knowledge, and experience by including these important players in the decision-making process and utilizing their knowledge and skills for sustainable development. This cooperative strategy encourages ownership and gives local actors the confidence to spearhead constructive change in their communities.

Localization also highlights the significance of community participation and ownership. There is a greater chance of success and sustainability when local communities actively participate in decision-making processes and feel a feeling of ownership over development efforts. USAID strives to increase



the effectiveness and sustainability of development initiatives by empowering local actors, organizations, and communities.

9. USAID STRATEGIC PIVOT: *Implementing the change.*

The way USAID oversees the program cycle in terms of Strategy, Design, Implementation, Monitoring, and Learning will need a [significant shift](#) in order to accommodate **localization**.

The [Local Works program](#) and the [Localization Progress Report](#) serve as examples of USAID's dedication to boosting direct support to local partners and fostering local leadership in its initiatives. These programs are an extension of USAID's efforts to support locally driven development and reinforce alliances with regional players.

By the conclusion of FY 2025, USAID will be giving local partners direct access to at least 25% of program funding, according to the Localization Progress Report from June 2023. Additionally, by 2030, half of its programming will include putting local communities in charge of establishing priorities, co-designing initiatives, spearheading their execution, and assessing the results of their work.

Through ambitious commitments to agency-wide change, USAID is building on prior learning, policies, and programs to establish the foundation for progress toward these aims and support improvements in how it operates. In order to encourage more participation and collaboration with local actors, the organization is coordinating its policies and tactics with localization goals, such as:

- A new [Policy Framework](#) outlining the Agency's plans to collaborate with local actors and reaffirming its commitment to doing so. The Policy Framework lays out three broad goals to propel advancement both within and outside of our programs: first, taking on the biggest issues of the day; second, welcoming new alliances; and third, making investments in USAID's long-term viability. These goals are related because addressing the biggest development barriers of today is essential to fulfilling our long-term goal. Taking action to solve them necessitates forming fresh, bold alliances, investing in our workforce, and simplifying our procedures.

Systematic Analysis	Priority	
Framework	Reflection	
Plan	Expansion	Goals
Measurement	Risk Management	
Human Resources	Strategies	

- A revised [Acquisition and Assistance \(A&A\) Strategy](#). The tools and cultural changes required for greater involvement with neighborhood organizations are outlined in this [Strategy](#). USAID recognizes that its employees play a critical role in serving as A&A specialists in Missions, particularly with regard to its localization initiatives. For every goal in the strategy, an implementation plan with doable actions has been created.
- An updated [Risk Appetite Statement](#). The USAID Risk Appetite Statement (RAS) was created to provide detailed guidelines on the types and amounts of risk that the Agency is willing to accept. In order to achieve the Agency's goals and purpose, a careful assessment of both opportunities and dangers served as the foundation for this decision. In order to make sure that the Agency's



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risk management procedures are in line with its overall objectives and aspirations, the RAS is an essential instrument. The Risk Assessment System (RAS) enables the Agency to make well-informed decisions and adeptly navigate the intricate terrain of development activity by precisely defining the allowed bounds of risk.

- A first-of-its-kind [Local Capacity Strengthening Policy](#). The LCS Policy builds on decades of USAID experience in capacity strengthening. This policy is an opportunity for the Agency to reexamine its capacity strengthening practices in light of the principles of [locally led development](#), as well as [systems thinking](#) and practice, to be a more effective and equitable partner. This policy was developed over three years through a highly participatory process where feedback was intentionally solicited, analyzed, and incorporated, as summarized in this [comment report](#).
- Specific questions in the 2022-2026 [Agency Learning Agenda](#) that outline USAID's learning goals and the data that will support those decisions. The purpose of the Agency Learning Agenda was to generate concepts for interacting with local partners most effectively and comprehending the ways in which these alliances support long-term development outcomes.
- [WorkWithUSAID.gov](#), a user-friendly website with crucial papers translated into several languages that offers easily understandable information in multiple languages on understanding how to interact with USAID. By including a comprehensive Partner Directory and a sub-opportunities page where companies looking to serve as subcontractors, subrecipients, or subs may connect, the website also offers additional networking opportunities.

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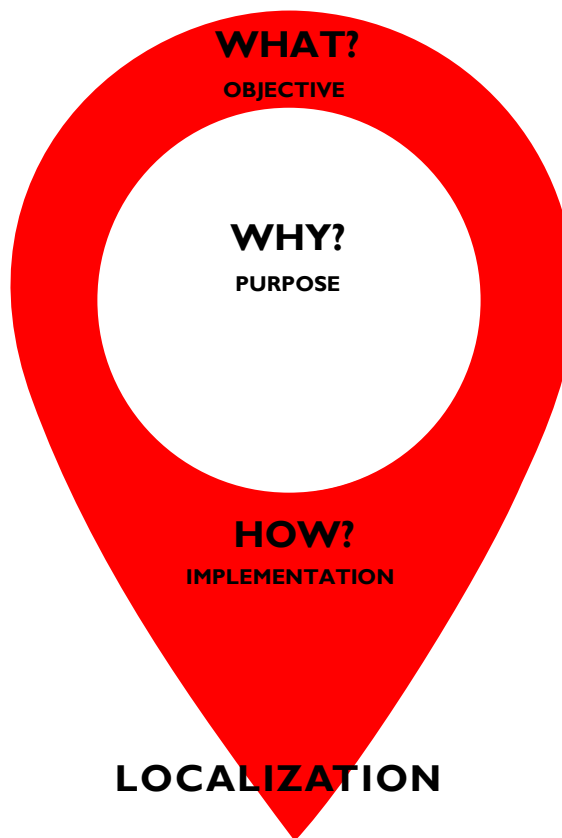
III. Conclusion of Section I.

The tendency toward localization in the dynamic field of international development is a purposeful dedication to effectiveness and inclusion rather than a response to external trends. USAID is a prominent figure in this revolutionary process, advocating for reform and adopting a more all-encompassing strategy for development. In addition to being in line with global trends, the agency's constant commitment to localization puts it as a leader, helping to shape a future in which communities take charge of their own destiny and local voices are given more prominence.

Even with the difficulties in managing power relations and internal opposition, USAID's leadership in understanding, adjusting, and dealing with these intricacies is still vital. Through the promotion of cooperation, exchange of experiences, and endorsement of the Localization Agenda's tenets, USAID plays a crucial part in molding a development environment that is both adaptable to worldwide changes and deeply entrenched in the resilience and self-determination of local communities.

- **WHAT IS USAID TRYING TO ACHIEVE?**

USAID is dedicated to carrying out a localization initiative that involves switching from centralized to decentralized methods. Through the customization of interventions to their unique situations, this project seeks to empower local communities. USAID hopes to increase the efficacy and long-term viability of its development initiatives by doing this.



- **WHY IS USAID IMPLEMENTING LOCALIZATION?**

The aim is to enhance the effectiveness and inclusivity of development initiatives by coordinating with global patterns, enabling local actors, and attending to specific local needs. In the end, this strategy seeks to promote context-specific and sustainable breakthroughs, which will eventually lead to long-lasting progress.

- **HOW IS USAID IMPLEMENTING LOCALIZATION?**

By encouraging collaboration with local groups, decentralizing decision-making, and modifying interventions to ensure they successfully reflect the varied needs and priorities of the communities they serve, USAID is actively putting localization principles into practice. A more individualized and responsive approach to development activities is made possible by this method.



Section II: Literature Review

Objective of Section II: Assessing the internal and external changes: to examine how USAID's internal procedures, organizational structure, resource distribution, decision-making, and project management are affected by the change in priorities, as well as how the local partners are affected.

I. Conceptual framework of Localization in USAID: development, goals, and principles.

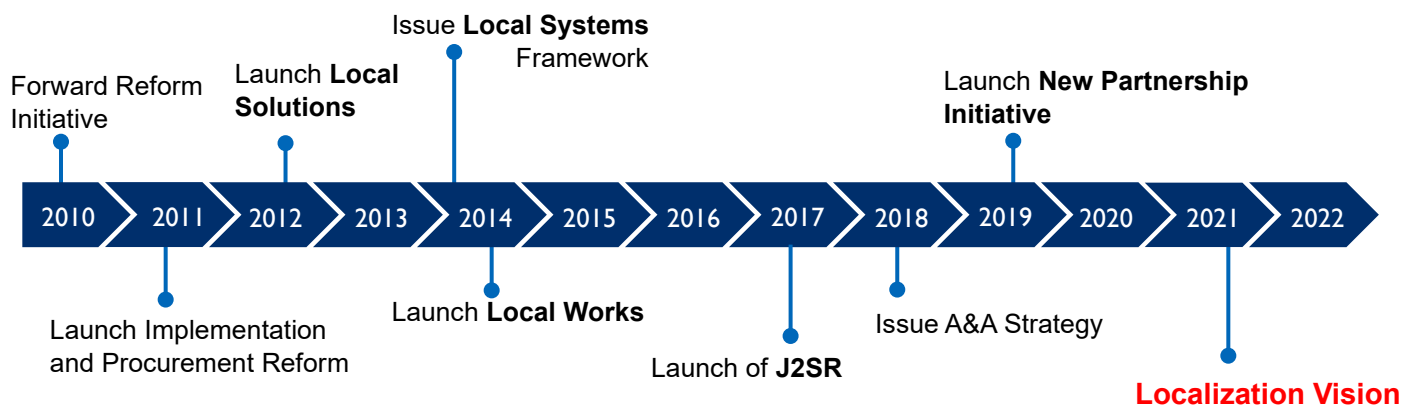
▪ Development:

Currently, USAID largely serves as a procurement agency, directing financing through sizable implementing entities that are situated mostly in the United States. It is the biggest bilateral donor organization to have established a fundraising goal in addition to taking steps to "localize" its operations.

The agency has surely been able to handle significant financial resources with comparatively fewer staff members because to its operating style. It also limits the agency's capacity to interact directly with the populations it seeks to support. Staff members are frequently encouraged by bureaucratic pressure to move quickly to implement agreements with well-known implementing partners who have the know-how to handle the complexities of USAID procurements. As a result, local partners find it extremely difficult to take advantage of possibilities.

The conventional relief technique frequently follows a **centralized structure** in which actions and choices are mostly made by higher authorities. This **top-down strategy** frequently overlooks the long-term effects or engagement of local communities in favor of short-term rescue initiatives.

A decade of Localization at USAID





- From 2010 to 2016, the **USAID Forward initiative** sought to advance sustainable development by forming high-impact partnerships and putting local ideas into practice..
- USAID launched the **Local Solutions initiative** (formerly known as **Implementation and Procurement Reform**) as a cornerstone of its USAID Forward reform agenda. This marked a significant change in how USAID administers assistance, emphasizing public-private partnerships and allocating funding to local governments and organizations that have the local knowledge and expertise to bring about positive, long-lasting change. Additionally, USAID expanded its partner base.
- **Local Works** was founded by the agency in 2014, in addition to USAID Forward. Through this initiative, USAID Missions can work directly with non-traditional and local partners, providing them with discretionary financing for a period of five years.
- USAID set out to refocus its partnership models, program practices, and tactics with the introduction of the **Journey to Self-Reliance** in order to achieve more meaningful development results and move closer to a future in which foreign aid is no longer essential.
- USAID's **Acquisition and Assistance (A&A) Strategy** is a comprehensive framework intended to support development results that are inclusive, sustainable, and locally led. To accomplish its goals, this approach makes use of a variety of funding and support channels, such as grants, contracts, and cooperation agreements.
- In 2019, USAID launched the **New Partnership Initiative** in an effort to expand its network of collaborators. The program seeks to remove barriers to participation and provide new avenues for partners to become involved. Utilizing the knowledge and perspectives of institutions with close linkages to the populations and communities we serve is USAID's main objective. By doing this, we ensure that our partner nations serve as engines for their own

- **USAID Forward reform initiative:**

The USAID [Forward reform initiative](#) represented a significant and all-encompassing endeavor undertaken by the U.S. Agency for International Development (USAID) to revolutionize its operational framework. This large-scale [reform agenda](#), USAID Forward, was an effort to strengthen the Agency by embracing new partnerships, investing in the catalytic role of innovation and demanding a relentless focus on results.

- **Implementation and Procurement Reform:**

The USAID [Implementation and Procurement Reform](#) (IPR) encompassed a series of strategic initiatives with the primary objective of streamlining the procurement process, forging new partnerships, and institutionalizing reforms. These reform endeavors were meticulously designed to curtail the Procurement Action Lead Time (PALT), amplify program funding directed towards local partners, and cultivate supplementary procurement trainings and standardized templates.

- **Local Works:**

Through [Local Works](#), USAID Missions have more time and greater freedom to pursue locally led programming and innovative ways of working. Since 2015, Local Works has supported locally led development programming in 32 countries.

- **Journey to Self-Reliance:**

The [J2SR](#) was a comprehensive approach designed to empower partner countries in taking charge of their own development, ultimately reducing their reliance on foreign assistance.

- **Acquisition and Assistance (A&) Strategy:**

The vision of the [A&A Strategy](#) is that USAID and its partners enable sustainable, inclusive, and locally led development results through acquisition and assistance. USAID will achieve this vision through three objectives.

- **New Partnership Initiative:**

With new and different approaches, [New Partnership Initiative](#) simplifies access to USAID resources and makes it easier for partners to bring forward their ideas and innovation—while strengthening local capacity so that our partner countries gain new knowledge and skills to lead and sustain their own development.



Private International Institute of Management and Technology

sustained economic progress. This is consistent with the entire Journey to Self-Reliance that USAID has described in its broad policy framework.

A relevant worry about possible redundancies and shifting goals with changes in leadership is brought up by the observation about the recurrent administrative priorities, such as USAID Forward, Local Solutions, J2SR, and now the Localization Agenda.

It is crucial to comprehend how, even if these programs have similar goals, they are rebranded for every new government, which might cause them to be seen as less vital and transient.

To guarantee continued emphasis and effect, the Localization Agenda, in particular, must overcome this historical tendency. Acknowledging the necessity of persistence and dedication beyond the term of an individual government is essential to the accomplishment of the Localization Agenda. It emphasizes how crucial it is to develop a story that endures beyond political shifts and highlights the continued significance and worth of localization initiatives. By tackling this issue, the Localization Agenda will be able to solidify its position as a long-term, essential aspect of USAID's overall goal, guaranteeing a more significant and long-lasting influence on development plans and collaborations with local stakeholders.

- **Goals:**

The localized model, in contrast to the traditional method, adopts a **decentralized strategy**, enabling local actors to oversee their own growth. **This bottom-up strategy** guarantees that solutions are customized to the unique requirements and circumstances of the local people by involving communities at the grassroots level.

The complex power dynamics and administrative realities that exist between the field missions and Washington, where broad administrative priorities are set, must be acknowledged, nevertheless. Although the localization mandate from USAID indicates a commitment to more decentralized and community-driven development, there is an additional degree of complication in comprehending how administrative priorities are developed in Washington and how they trickle down to field missions. Analyzing these relationships might help clarify the contradictory character of the localization mandate, which combines a community-centric, bottom-up approach with a top-down direction. When discussing the localized model within the context of USAID's larger organizational structure, it is important to take this conflict between decentralized execution and centralized decision-making into account.

Within the context of USAID's conceptual framework, localization aims to ensure contextual relevance, empower local actors, and advance sustainable development. These goals include enabling local communities to actively lead initiatives, enhancing organizational and individual skill sets through capacity building, incorporating cultural sensitivity into interventions, and advancing locally driven, sustainable development.

Moreover, maximizing the effect of our combined efforts is possible via the development of solid partnerships and cooperation between USAID and regional organizations. Flexibility and adaptability are highly valued in our framework since they allow us to successfully respond to the dynamically ever-changing local settings.



▪ **Principles:**

A collection of guiding principles forms the basis of the Localization framework that USAID uses.

One of USAID's goals is to use capacity-building programs to empower local populations. USAID wants to give these communities the resources and tools they need so they can manage their own development. The organization also works to promote inclusiveness in decision-making procedures so that all viewpoints are taken into account and heard.

Understanding the significance of cultural context, USAID emphasizes the need of valuing and incorporating the distinctive cultural characteristics of the communities it works with. This methodology not only guarantees culturally relevant therapies but also amplifies their efficacy and durability.

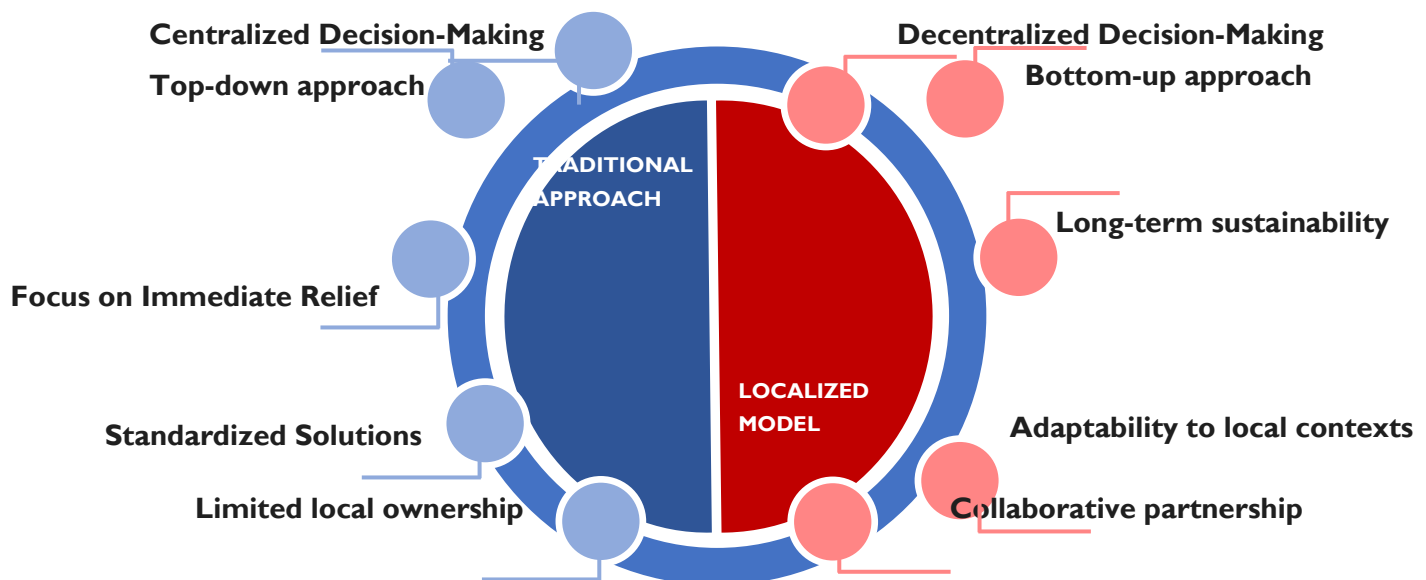
USAID understands that in order to achieve significant and long-lasting development results, cooperation is necessary. The agency can increase the effectiveness of its activities by collaborating closely with local partners and taking use of their knowledge and experience.

Another essential component of the framework is flexibility. USAID is aware of how dynamic and ever-changing local settings are. As a result, the organization continues to be flexible and willing to modify its plans and methods to better meet the unique requirements and conditions of every community.

The Localization framework also emphasizes the significance of community-centered monitoring and assessment. USAID makes ensuring that interventions are assessed from the viewpoint of people who are directly impacted by them by actively incorporating local populations in the assessment of project impacts. This methodology not only amplifies responsibility but also cultivates a more profound comprehension of the community's requirements and goals.

USAID has strong monitoring and evaluation systems that capture success from the viewpoint of the communities affected in order to measure the impact at the local level. This guarantees that its activities are in line with the goals and needs of the individuals it seeks to assist, in addition to being successful.

The localized model—supported by USAID—values the expertise and contributions of local actors and highlights a transfer of authority from foreign intermediaries to local implementers.





Centralized Decision-Making

In conventional assistance, decisions about project design, execution, and resource allocation are usually made by external players, such as donor nations or international organizations, using a centralized decision-making framework.

Top-down approach

The domination of higher authority or leadership at the top of the organizational structure is a hallmark of top-down management or decision-making. This methodology involves the creation of broad objectives and top-level decision-making, which are then communicated and implemented across the whole company.

Focus on Immediate Relief

Rather than addressing the underlying systemic difficulties, traditional help frequently places a higher priority on providing quick relief and addressing the symptoms of problems. As a result, it might not embrace a long-term, sustainable development viewpoint.

Limited local ownership

The planning, design, and implementation of projects are often dominated by external groups, resulting in a constraint on local ownership. As such, sustainability might be jeopardized if outside support diminishes.

Standardized solutions

Often times, solutions are standardized and applied to several contexts without considering the unique cultural, social, and economic characteristics of different groups or areas enough.



Decentralized Decision-Making

By emphasizing local players in the design, execution, and assessment of development initiatives, the localized model promotes decentralized decision-making. This method gives local organizations more control over project objectives.

Bottom-up approach

Using a bottom-up strategy would mean talking to local communities in-depth, getting to know their unique possibilities and difficulties, and tailoring development initiatives to fit their priorities.

Long-Term Sustainable Development

Long-term sustainable development aims to enable local communities to autonomously sustain positive outcomes by addressing the root causes of problems. The goal of this strategy is to increase these communities' capabilities so they can prosper over time.

Collaborative Partnerships

Through the use of external partners in place of dominating players, these partnerships can guarantee that local communities participate more actively in decision-making. Diverse stakeholders are brought together by it, including members of the local community, governmental bodies, nonprofits, and businesses.

Adaptability to Local Contexts

The localized approach recognizes and values the diversity that exists naturally in local environments. It gives flexibility a high priority since it makes it possible to develop adaptable tactics that can be tailored to each community's unique requirements and circumstances.



II. Challenges and opportunities of implementing localization approach.

Using localization techniques in development projects has [challenges and opportunities](#). To guarantee the effectiveness and durability of localization initiatives, it is imperative to understand and address these variables.

CHALLENGES

- **Capacity Constraints:** One of the main obstacles to localization method execution is the limited capacity of local communities and organizations. Their capacity to actively engage in and meaningfully contribute to development projects is hampered by this limitation. In order to overcome this obstacle, funds must be set aside for the purpose of strengthening local actors' capacities through extensive training and skill development initiatives.

It takes longer, is riskier, and is more difficult to work with local partners. The procedures used by USAID are "onerous," Smaller local businesses might be unable to work directly with the agency because they lack resources like internal legal counsel and accounting knowledge.

- **Coordination and Communication:** Effective coordination and communication amongst several stakeholders is critical to the successful execution of localization initiatives. Establishing unambiguous channels of communication, making ensuring that frequent feedback mechanisms are in place, and encouraging cooperation amongst the many actors participating in the development projects are essential.

- **Financial Resources:** Sufficient financial means are necessary for localization strategies to be implemented successfully. Financial limitations frequently prevent local groups from participating fully in development projects. To assist local actors in their endeavors, it is imperative to investigate novel funding strategies and guarantee the equal allocation of resources. Furthermore, USAID needs to encourage local systems in their eventual transition away from reliance on finance from foreign donors while also taking into account the potentially disruptive role that foreign aid plays in these systems. USAID does not intend to artificially inflate a local organization's size above what can be sustainably provided by local resources once an award concludes by inundating it with funds on a temporary basis.

- **Human Resources:** The challenge of localization is made more difficult by the shortage of personnel and human resources needed to work with local actors. This complex problem burdens current staff members greatly in addition to impeding successful translation attempts. Insufficient workforce numbers cause the team to have an excessive workload, which causes burnout and lower production. As a result, fatigued employees would find it difficult to interact with local actors or offer the required assistance, which would further impede cooperation.

Direct partnerships with local organizations will probably necessitate the Agency managing more minor grants. Samantha Power promised to increase the Agency's ability to carry out this task, in part by giving Foreign Service Nationals (FSN) the authority to participate more actively in the procedure.



Localization necessitates a unique skill set that includes technical aptitude, cultural awareness, and language fluency in addition to mentality modifications toward being more adaptable and willing to work in other ways. Furthermore, human resources are further taxed by strict deadlines. Efficient workforce and task management is necessary to strike a balance between timely delivery and localization quality.

- **Power Dynamics and Resistance to Change:** Opposition to change and power dynamics can be major obstacles to the localization process. External players who are hesitant to cede control and decision-making authority may oppose local actors. To overcome these obstacles, addressing power disparities and encouraging inclusive decision-making procedures are crucial. It is also important to note that USAID should be subject to the adjustment in order to lessen the burden of reporting requirements and to be significantly involved in decision-making about the execution of awards.

- **Cultural Sensitivity:** Implementing localization strategies successfully depends heavily on cultural sensitivity. It is imperative to comprehend and honor indigenous cultural norms, beliefs, and practices to guarantee that development endeavors are both sustainable and suitable for the given setting. Cultural sensitivity may be promoted by interacting with local populations and include them in the decision-making process.

- **Political Instability:** Localization attempts may face substantial obstacles due to political instability. Political unpredictability may sabotage development programs and impede advancement. Establishing robust ties with local actors, promoting discourse, and pushing for stability and good governance are crucial strategies for navigating these issues.





OPPORTUNITIES

1. Local Empowerment:

Empowering local populations is a major benefit of localization strategies in development initiatives. We may use local actors' resources, expertise, and knowledge by involving and engaging them, which will promote a feeling of accountability and ownership.

Local knowledge may significantly boost the impact of foreign aid by working with USAID to influence its initiatives.

2. Sustainable Development Outcomes:

Additionally, localization has the ability to produce results for sustainable development. Through customization of interventions to the unique requirements and environments of nearby communities, we can guarantee that initiatives will ultimately be more successful, efficient, and impactful.

Working with and through local actors and leaders, in the spirit of "Progress Beyond Programs," produces impacts and maintains progress much beyond the duration of a particular grant or program.

3. Innovation and Adaptability:

Adopting localization promotes increased creativity and flexibility. Due to their in-depth knowledge of their own areas, local actors are able to recognize original problems and modify plans of action to fit particular circumstances. This adaptability raises development programs' overall efficacy.

It makes more sense and is more effective to use development and humanitarian resources to provide local actors the opportunity to take the lead.

4. Cultural Diversity as a Strength:

Cultural diversity is acknowledged by localization as an asset rather than a problem. We may design more inclusive and culturally sensitive programs that connect with the people they are intended to serve by appreciating and embracing local traditions, practices, and knowledge systems.

5. Community Engagement and Social Capital:

Localization strategies promote social capital development and community involvement. We may create more trusting relationships, fortify social networks, and encourage group action by actively include local players in decision-making processes. This will result in more significant and long-lasting effects.

6. Partnerships and Collaboration:

Collaboration and collaborations amongst different stakeholders are encouraged by localization. By cooperating, we may take use of the resources and strengths of many players, creating synergy and optimizing the beneficial effects of development initiatives.

7. Adaptation to Local Contexts:

Finally, localization highlights how crucial it is to modify treatments for local settings. Since every community is different, we must customize our strategies to meet particular needs and take advantage of regional advantages in order to make sure that our activities are pertinent and successful.



- **Adaptive Programming:** USAID uses flexible, iterative development methods that allow for modifications based on ongoing input and learning. This strategy makes it possible to accomplish development objectives with more efficacy and responsiveness.

- **Gender and Social Inclusion:** Dedicated to meeting the particular requirements of various demographic groups, including initiatives to empower women and underrepresented communities.

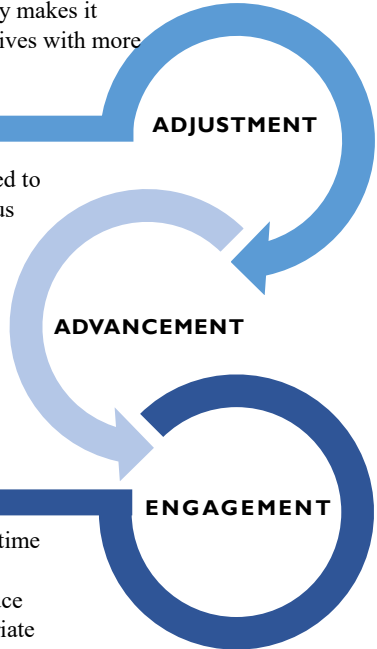
- **Inclusive Decision-Making:** USAID seeks to involve local actors in the design, execution, and assessment of programs in order to promote more inclusive decision-making processes.

- **Use of Local Solutions:** Setting aside time and effort to find and use local resources, expertise, and innovations in order to produce solutions that are both contextually appropriate

- **Monitoring, Evaluation, and Learning (MEL):** Strong MEL processes are integrated into programs, enabling ongoing evaluation, learning, and modifications in response to immediate input from local actors and beneficiaries.

- **Local Capacity Building:** USAID is aware of how crucial it is to develop local capabilities. USAID gives local actors and organizations the tools they need to take the lead in carrying out development programs by investing in their growth.

- **Collaborative Partnerships:** In order to guarantee that development programs are based on local objectives and knowledge, USAID works to strengthen its connections with local governments, organizations, and leaders.



Implementing localization strategies in development projects successfully calls for a careful, situation-specific strategy. It requires the active participation and empowerment of local actors so they may provide their ideas and areas of expertise.

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III. Review the existing literature on localization.

1- What does localization mean in the context of international development and humanitarian agencies?

▪ Wikipedia

Localization (or [localisation](#)) is the practice, in humanitarian aid, to give more decision making power and funding to organizations and people that are based in countries affected by humanitarian emergencies.

▪ European commission

In the humanitarian sector, [localization](#) means empowering local responders in affected countries to lead and deliver humanitarian aid. It aims at strengthening the capacity and resources of local organizations to respond to crises and promote long-term sustainability.

This method acknowledges the value of cultural sensitivity and local knowledge in delivering efficient assistance that is suitable for the recipient's culture..

▪ The International Federation of Red Cross and Red Crescent Societies (IFRC)

[Localization](#) means increasing international investment and respect for the role of local actors, with the goal of increasing the reach, effectiveness and accountability of humanitarian action.

It is also a way of re-thinking the humanitarian sector from the ground up—recognizing that the overwhelming majority of humanitarian assistance is already provided by local actors.

▪ United Nations Office for the Coordination of Humanitarian Affairs (OCHA)

Humanitarian response should be “as [local](#) as possible, as international as necessary.” Local NGOs have experience of dealing with emergencies, which makes them extremely effective in a humanitarian response. They are critical for the humanitarian community to stay and deliver in an already challenging environment.

Local NGOs and aid workers are often the first responders during a crisis. They have solid networks within the community, which helps them identify the most vulnerable groups that need assistance.

▪ InterAction, a coalition of U.S.-based international NGOs:

The concept of “localization” is not new, as several initiatives for over two decades have been calling for localizing aid (through funding, partnerships, or other means) or ensuring more “local ownership.”

There is a lack of a globally agreed-upon definition of localization and different understandings of what makes an actor “local.” Some argue the term itself is a problem, and alternative terms have been suggested (local humanitarian action, complementarity, decentralization, etc.)

Based on the aforementioned definitions, it becomes evident that the concept of Localization intersects among various interpretations.

Localization in the context of development and humanitarianism is giving local groups and people in impacted nations the authority and capacity to take the initiative and provide relief. This strategy entails giving local actors respect, financial resources, and decision-making authority while appreciating the value of their established community networks, local expertise, and cultural awareness.



The primary aim is to improve the ability, scope, efficacy, and transparency of humanitarian endeavors, thus promoting a transition towards a more focused and enduring methodology. This common viewpoint emphasizes the idea of focusing humanitarian response as much as possible locally, but acknowledging the need for international assistance when needed.

2- When has this shift started?

Humanitarian relief organizations tend to favor Europeans and North Americans when it comes to leadership roles, which limits the chances that those who have lived through emergencies personally may take on such responsibilities.

At the 2016 [World Humanitarian Summit](#) in Turkey, governments and humanitarian groups decided that localization was necessary. The United Nations Office for the Coordination of Humanitarian Affairs supported localization in 2017 as a component of the ["New Way of Working,"](#) a larger set of changes. The WHS, which supported the localization principle, was a major turning point in the humanitarian field. This meeting made clear how important it is to give local participation in humanitarian efforts top priority while also acknowledging the value of receiving outside assistance when needed.

This change in viewpoint recognized the vital role that neighborhood NGOs and relief workers played in serving as the first responders in times of need, utilizing their robust networks within the community. The WHS promoted a more effective, transparent, and culturally aware approach to humanitarian relief with the goal of increasing foreign investment and respect for local players. This was accomplished by giving impacted countries' organizations more authority and competence.

The ["Grand Bargain,"](#) a collection of 51 promises supported by 56 states and 29 organizations, represented the common commitment regarding localization at the WHS. "Reinforce, not undermine, the capacity of local and national responders" was one of the main pledges. The Grand Bargain also stressed the significance of forming just alliances, enhancing the ability of impacted nations and communities, and raising funds for the management and efficacy of regional humanitarian groups.

3- Literature review for the USAID:

American goals in Washington and at USAID field missions and embassies have long since given way to partner governments' and local stakeholders' priorities in U.S. development strategy.

This change, sometimes referred to as decolonization, localization, national ownership, locally driven development, and ownership, attempts to grant greater authority to emerging nations. The processes of allowing local civil society define the agenda, letting the partner government take leadership, diverting foreign support to local groups, and encouraging community-led development are all referred to by these words interchangeably. It all comes down to giving the people more authority and ensuring that they have a voice in their own development.

Localization is a major area of concentration for USAID's development and humanitarian aid initiatives. USAID has put in place a number of programs and policies to facilitate the integration of local knowledge and resources.

An overview of USAID's localization literature and its influence on development programs is what the USAID localization literature study aims to give.



This study summarizes the substantial work that USAID has been doing for more than 10 years in the area of localization. The data put forward amply illustrates the innovative role that USAID had in working with local players in a variety of fields.

USAID is implementing the following strategies in order to do this:

📍 With a focus on prioritizing local actors as implementing partners, USAID has developed a **collaborative and co-creative approach** to project design, with a particular emphasis on universities, think tanks, government agencies, and private sector groups.

The Localization Agenda and Private Sector Engagement Policy of USAID both depend on co-creation. It entails bringing people and organizations together to solve problems with development and promote local ownership.

Co-creation brings people together to collectively design solutions to specific development challenges. Time-limited and participatory, partners, potential implementers, and end-users define a problem collaboratively, identify new and existing solutions, build consensus around action, and refine plans to move forward with programs and projects.

The following are the main facets of USAID's co-creation approach:

- ***Inclusive participation:*** - Inclusive participation: A wide variety of stakeholders **are actively involved** in the design and execution of development initiatives thanks to USAID's co-creation methodology. The solutions created are more likely to be culturally appropriate and to take into account the unique needs and goals of the community when there is inclusive involvement.
- ***Shared decision-making:*** Co-creation prioritizes collaborative decision-making procedures in which all parties involved have **an equal say** in the direction of development initiatives. This strategy acknowledges that local actors may offer special insights to program design and hold invaluable information and skills about their own areas. USAID hopes to instill a feeling of ownership among local stakeholders through decision-making involvement, which will result in more effective and sustainable outcomes.
- ***Collaborative problem-solving:*** Co-creation fosters cooperation amongst various players in order **to collaboratively identify and tackle development challenges**. Through the integration of many viewpoints, competencies, and assets, USAID seeks to promote inventive resolutions that surpass conventional methodologies.



📍 To further strengthen localization efforts, USAID has also successfully added **Collaborating, Learning, and Adapting (CLA) methodologies** into its development programs. USAID has effectively incorporated Community Led Agencies (CLA) concepts into the localization process to involve local organizations and communities in the design, execution, and assessment of its development initiatives.

CLA is a strategy that helps stakeholders work together, encourages lifelong learning, and makes adaptive management possible to increase the efficacy and sustainability of development initiatives.

Among the CLA approach's main features are:

- **Local knowledge and perspectives:** CLA emphasizes the importance of **valuing local knowledge** and **incorporating local perspectives** in the planning, implementation, and monitoring of development programs.
- **Co-creation with local actors:** CLA encourages **co-creating solutions** with local actors, fostering shared power and decision-making for mutually beneficial outcomes.
- **Feedback and adaptation:** CLA promotes seeking and **listening to feedback** from local stakeholders, enabling USAID and its partners to learn, adapt, and improve their programs.
- **Transparency and inclusion:** CLA supports USAID's commitment to being **transparent, inclusive, and responsive to local actors**, while fostering their development aspirations.
- **Measurement and learning:** CLA contributes to the development of **clear measures of success and greater support** for localization among key stakeholders, collaborators, and partners.

By incorporating CLA practices, USAID aims to create meaningful space for local actors to lead and participate in their development programs, ultimately driving lasting change in the places they work.

📍 Additionally, USAID utilizes **Monitoring, Evaluation, and Learning (MEL) strategies** to evaluate the impact of localization and locally led development programs.

MEL system includes a plan that explains the activity and its overall objectives and results, how data will be collected and maintained, how the information will be analyzed, and how the organization will integrate what it learns into activity improvements.

The key aspects of the [USAID uses MEL](#):

- **Baseline Assessment:** USAID would use the baseline assessments **to understand the existing conditions and capacities** of local organizations and communities before implementing any localization programs. This assessment would provide a benchmark against which progress can be measured.
- **Creating opportunities for qualitative reporting** that **flexibly allow the local partners to define success in their own terms**. This approach recognizes the diversity of contexts and goals across various local partners. By doing so, USAID encourages partners **to share narratives, testimonials, and case studies that capture the nuanced and context-specific impact of their programs**.



- **SMART Indicators:** USAID would work with local partners **to develop Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) indicators** that align with the goals of the localization programs. These indicators could include metrics related to capacity building, community engagement, resource mobilization, and sustainability.
- **Right-sizing indicators** to a manageable number and **ensuring indicators respond to local definitions of success.** Rather than relying on a one-size-fits-all approach, USAID must recognize the importance of tailoring indicators to specific local contexts. This involves collaborative efforts with local partners to **identify and prioritize indicators that truly capture the desired outcomes and impact of development initiatives.**
- **Data Collection:** USAID would establish a robust data collection system **to gather information on various aspects** of the localization programs. This could involve surveys, interviews, focus group discussions, and other participatory methods to capture both qualitative and quantitative data.
- **Regular Monitoring:** USAID would **regularly monitor the implementation** of localization programs to ensure they are on track and meeting their objectives.

By leveraging these strategies, USAID has not only demonstrated its commitment to localization but has also effectively harnessed the potential of local actors to drive sustainable development.

In conclusion, USAID's long-standing dedication to localization, its collaborative approach, and the integration of CLA principles have positioned it as a leader in the field of international development. By actively involving local actors and empowering communities, USAID is paving the way for more effective and sustainable development programs.

4- Evidence-based localization

Various USAID staff members have created disparate trackers / bibliographies of localization-related literature, but these have not been systematically analyzed.

- Local Knowledge evidence review
- Localization definition and metrics
- Localization Evidence-base
- LCS Policy Annotated Bibliography

An internal compilation of case studies, assessments, webinars about the evidence base, and internal USAID reporting is called the Locally Led Development Evidence Base. The body of data is still growing and will eventually comprise case studies, analyses, and assessments from the LLD R&D grants.

The goal of the Evidence Localization Initiative is to make sure that academics with in-depth knowledge of local contexts can actively influence USAID's procedures.

USAID's consistent commitment to incorporating local knowledge and resources into its projects is demonstrated by a number of publications and initiatives, with a particular focus on evidence-based and locally led development. The evidence must be supported by a clear statement of the localization goals



and a thorough theory of change that outlines the steps involved in accomplishing each goal in order for USAID to find it to be genuinely helpful.

What is a Theory of Change (TOC)?

USAID has a resolute dedication to employing a theory of change as the fundamental hypothesis behind its developmental initiatives. This methodology facilitates efficient observation, education, and assessment by formulating a distinct and validated set of conjectures.

It is crucial to remember that the theory of change does not intend to take the place of theories of change that are project-specific. Instead, it functions as a thorough framework that clarifies how the agency's activities support certain development goals.

This goal must be broken down into different theories that explain why locally driven development might produce better results than centralized development programs in order to investigate the empirical evidence about the relationship between localization and the efficacy of USAID's programs. We may have a thorough grasp of the topic and make insightful judgments by doing this.

Locally led development TOC formulation examples:

if local communities are empowered ...
and local capacities are strengthened...
Then sustainable development ...

if capacity building is ...
and knowledge sharing is...
then local solutions are ...

Localization can improve development initiatives' efficacy through four main mechanisms:

1. More context awareness and local knowledge:

According to one theory of change, local knowledge may be better utilized in USAID programs, which would eventually enhance program results, if local stakeholders are more involved in the design and administration of project activities. Factual information, talents, and a better insight of the social, political, and administrative nuances of a particular setting are all included in the concept of local knowledge, along with an awareness of unspoken cultural norms. All of these components have the potential to improve development initiatives' efficacy.

2. Better resource alignment:

According to a different perspective, localization can improve program efficacy by better aligning resources. Including local stakeholders in the process of setting development priorities, in particular, gives marginalized populations more influence over how resources are distributed. Thus, programs that better suit their tastes are created as a result.

3. Increased accountability:

A different hypothesis suggests that by encouraging more responsibility, locally driven development can improve the efficacy of assistance initiatives. Elite capture and corruption are greatly diminished when local stakeholders are actively involved in the process of designating beneficiaries, tracking project progress, and assessing program outcomes. As a result, program monies are subject to increased accountability requirements.

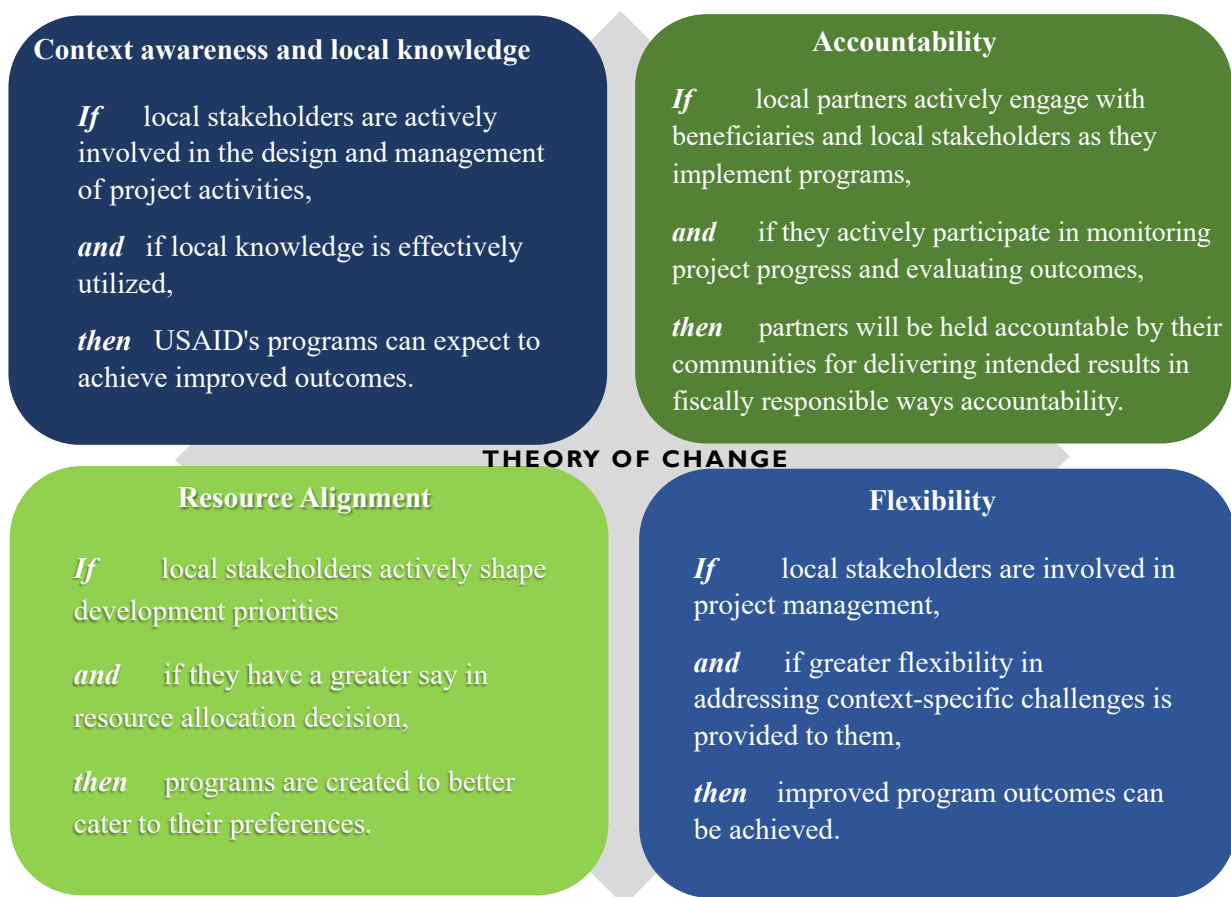


4. Increased flexibility:

According to theory, the involvement of local stakeholders in project management allows for greater flexibility in addressing context-specific challenges, ultimately leading to improved program outcomes.

Adopting localization in development programs by increasing awareness of local contexts, aligning resources more effectively, enhancing accountability, and embracing greater flexibility is a **strategic and holistic approach**.

USAID's commitment to actively engage local stakeholders taps into a wealth of diverse insights, optimizes resource allocation, promotes accountability, and provides the necessary flexibility to address unique challenges.



IV. A decade of localization at USAID Morocco.

In Morocco, USAID and its partners have a long tradition of supporting locally led development.

Together, USAID/Morocco and its partners have worked to improve local processes, give local leadership first priority, and attend to the particular needs of local people. Together, they have co-created creative



solutions with regional players, aggressively seeking out and carefully considering the input of regional stakeholders.

Moreover, USAID/Morocco and its associates have effectively created a favorable atmosphere inside programs sponsored by USAID, enabling local stakeholders to utilize their agency and decision-making authority to mold development projects that benefit their specific areas. With this strategy, the development process is guaranteed to be really led by the people it seeks to assist.



2010 – 2015

USAID Morocco has made major efforts to assist regional groups in their attempts to enhance water management as part of our mission to advance sustainable development. Three local groups have received support for these initiatives from USAID Morocco. The objectives of these initiatives were environmental preservation, improved water management, and water quality restoration. They also addressed the problems with water and sanitation that three isolated settlements were facing. The initiatives also sought to repair the dilapidated water lines that now provide water to the community's residents. The program's objective was to do away with the necessity for local women and girls to get water from shared sources. They were then able to actively engage in educational and revenue-generating pursuits as a result.

The three Development Grants Programs (DGPs):

- Tissilte Association for Development: *Sewerage and Wastewater Reuse in the Tidili area.*
- Aghbalou Association for Development and Environment Protection (ADPE): *The Water Supply and Sanitation for Aghbalou Village Project.*
- Association El Khair: *Peace and Potable Water for Outerbate Project.*

2016 – 2021

USAID is giving direct grants to five civil society organizations (CSOs) to help them build their capacities and become intermediary support organizations (ISOs) that help their entire network develop the skills necessary to effectively engage with the government on behalf of citizens, in support of the Government of Morocco's efforts to increase civic participation. The five chosen ISOs are established local groups that support the goals and interests of their constituents and are deeply ingrained in their communities.

The scope of the activity consists of two overall objectives:

- Applicants selected as ISOs strengthen their internal capacities, organizational practices, and overall skills in order to become the capacity development “go-to” centers for other CSOs; and
- CSOs are strengthened and are able to contribute more effectively in the law making and public policy process through advocacy and engaging the Government of Morocco at the national and/or local levels.



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Through direct grants, USAID supports the ISOs in promoting locally driven development by:

- Strengthening ISO internal capacities, organizational and technical practices, subject-matter expertise, and overall skills to become the “go-to” center for other CSOs.
- Building core skills of partners CSOs to more effectively influence public policy making and implementation.
- Developing networks among other CSOs to collectively engage in the public policy process, conduct advocacy work, and enforce accountability of decision-makers in addition to defending a more permissive legal environment for CSOs in Morocco.

The five ISO Grantees:

- Mouvements Alternatives Citoyenne (ALCI): *Partners for change.*
- Association Marocaine de Solidarité et de Développement (AMSED): *Strengthening capacity development of CSOs: For better civic engagement in the process of public policy development and citizen mobilization.*
- Association Ennakhil: *Contribution to achieving participatory democracy in the Marrakech-Safi region.*
- Association La Colombe Blanche
- Forum Azzahrae pour la Femme Marocaine (FAFM): *Engage CSO leaders in advocacy and public policy evaluation.*

2021 – 2024

Three civil society groups (CSOs) are receiving financing from USAID in order to raise civic education and knowledge of citizens' participation in public life, particularly among women, young people, and people with disabilities. People will participate more actively and feel more a part of the community as they become more aware of their roles and duties in the democratic process.

This program is essential to the goals of USAID/Morocco and enhances current and upcoming initiatives to promote equitable socioeconomic development in Morocco. In addition, ICE and its partners hope that additional strategies and interventions that work and fit in with government aims will be adopted widely.

Through these grants, USAID is supporting the CSOs in promoting inclusive civic education by:

- Increasing awareness, engagement, and participation of marginalized populations in governance and policymaking through civic education, including public resource management.
- Enhancing public trust and confidence of marginalized populations in the ability of elected officials to govern and realize policy changes that are responsive to the needs of marginalized populations, with a focus on youth, women, and PWDs.
- Improving perceptions of the targeted marginalized populations towards the political process.

The three ICE Grantees:

- Association de la Jeunesse de Tamdout pour la culture et développement (AJTCD) : *Citizen Lab Program*
- Mouvements Alternatives Citoyenne (ALCI) : *Listen to my voice.*
- Moroccan Institute for Policy Analysis (MIPA): *Open university for citizenship.*



2022 – 2026

In order to provide effective learning services, research, and evaluation, USAID/Morocco is collaborating with people and institutions that possess these skills, paying special focus to the sharing and use of information. This might include giving verbal summaries of the findings, composing reports with an emphasis on utilization, and/or assisting in the joint development of suggestions, conclusions, and modifications. Any topic that is pertinent to USAID/Morocco programming may be included in sectoral emphasis areas; these may include, but are not limited to, socioeconomic development; civil society involvement; democracy, human rights, and governance; and the inclusion of women, youth, and persons with disabilities.

Below is the range of services that the partners are providing:

- **Evaluation services**, which may include designing rigorous baseline, midterm, endline, and/or ex-post performance evaluations; mobilizing and managing evaluation teams; and conducting evaluations of development programs;
- **Qualitative research services**, which may include designing and conducting desk reviews and literature reviews of socio-economic development activities; and/or conducting applied research of socio-economic development activities and/or political economy analysis;
- **Assessment and measurement expertise**, which may include providing subject matter expertise for measurement and assessment tools on topics including civil society engagement; democracy, human rights, and governance; inclusion of women, youth, and persons with disabilities; climate change; and/or socio-economic development; and
- **Learning and facilitation technical assistance**, such as facilitating learning events and workshops for co-creation/design, evaluation and/or research stakeholders (including the use of virtual platforms for remote meetings) or pause and reflect sessions.

The four BPA Holders:

- Happy Smala
- Mobilising for Rights Associates (MRA)
- ABI Consulting
- Kamal Mellakh, Independent consultant

2024 - ...

Locally-Led climate Action program in progress...

The significant initiatives carried out by USAID Morocco demonstrate our steadfast commitment to sustainable development via proactive partnerships with regional institutions.

The sectoral emphasis on human rights, democracy, governance, inclusiveness, climate change, and socioeconomic development is an example of a holistic strategy that is in line with the larger goals of USAID/Morocco. These projects not only demonstrate our commitment to localization, but they also mark a big advancement toward inclusive and sustainable development methods.

It is extremely remarkable that USAID Morocco supported local partners throughout the pre-award process. The team has been actively involved with local stakeholders from the start, using a variety of methods to make sure that their opinions are appreciated and heard. Before developing new initiatives, USAID/Morocco usually carries out an iterative listening tour, engaging with key stakeholders and the general public as well as representatives of the government, media, academia, the



commercial sector, and civil society. These listening trips are extremely helpful in getting firsthand information from local actors about their needs, goals, and priorities for various USAID programs.

A key strategy that propels locally led development is listening. Unexpected answers and open-ended discussions can arise from attentive listening, encouraging deliberate, thoughtful, and purposeful procedures that draw on local knowledge. Respect for others is shown by this open listening strategy, which also makes room for genuine conversation. USAID Missions have undertaken effective listening exercises with local actors in varied communities using focus groups, individual talks, intercept interviews, and other polite dialogue methods in a number of countries.

There are several advantages to listening for USAID and the communities it works with. It permits a more thorough comprehension of regional circumstances, facilitating the creation of more specialized and successful initiatives. USAID can strengthen relationships and encourage a feeling of ownership in the communities by actively interacting with local players. Additionally, listening makes it easier to spot creative ideas and chances that you would have missed otherwise.

Ultimately, this collaborative approach leads to more impactful and sustainable development outcomes:

- Stronger relationships, better collaboration and greater trust.
- A better understanding of the challenges, capacities, opportunities and power dynamics in communities.
- Greater community engagement in the process to address potential challenges during implementation.
- The chance to identify and support positive deviants, innovations and good practices.

Additionally, co-creation is used by USAID Morocco while designing its initiatives. Co-creation is a design methodology that empowers individuals to work together to collaboratively generate a mutually beneficial result through a participatory process that presumes a certain level of shared authority and decision-making. It is a time-bound procedure with the goal of producing a certain result. Building local ownership of results can be facilitated by actively including important stakeholders and local partners in the design of development programming.

When implemented effectively, co-creation has the potential to transform partners and stakeholders of USAID into active participants who create activities, set priorities, and co-own investments made by the organization.

Furthermore, USAID/Morocco is dedicated to offering its new partners capacity building assistance initiatives. The objective is to help these partners build the financial and project management skills necessary for their projects to be implemented successfully and to comply with Agency and USG standards.

The support programs include a variety of sessions, some of which are centered around the following themes:

1. *Work Plan Preparation:* Learning how to effectively prepare a comprehensive work plan that outlines project objectives, activities, and timelines.
2. *Monitoring and Evaluation System:* Establishing a robust monitoring and evaluation system to track project progress and outcomes. Developing a Performance Management Plan to ensure project goals are met.



3. *Reporting Requirements*: Understanding the quarterly and annual reporting requirements expected by USAID. Learn how to compile accurate and timely reports to keep the Agency informed.
4. *USAID Branding and Communication*: Familiarizing with the regulations governing USAID branding and learn how to develop a communication plan that effectively conveys project achievements and impacts.
5. *Outreach and Results Communication*: Discovering strategies for effective outreach and communication of project results to key stakeholders and target audiences.
6. *Financial Management and Compliance*: Gaining insights into managing USAID funds and adhering to Agency regulations. Learning best practices for financial management and compliance.
7. *Project Administration*: Understanding the proper procedures for staffing, procurement, and inventory management to ensure smooth project administration.
8. *Financial Audits*: Learning about the importance of financial audits and how to prepare for them. Understanding the necessary steps to ensure compliance and accountability.
9. *Program Income and Cost-Share Reporting*: Familiarizing with the reporting requirements for program income and cost-share contributions. Learning how to accurately report these financial aspects.
10. *Roles and Responsibilities*: Understanding the roles and responsibilities of all parties involved in a cooperative agreement. Clarifying expectations and ensuring effective collaboration.
11. *Project Closure*: Preparing for project closure by understanding the requirements for final performance and financial reporting. Ensuring a smooth transition and successful completion.

By adopting a holistic approach, we are able to address the immediate needs of the communities we serve while also considering the long-term impact of our interventions.

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V. Conclusion of Section II.

The two-pronged viewpoint on localization—from the standpoint of USAID particularly as well as the larger humanitarian context—highlights the widespread understanding of the value of community-driven solutions and cooperation in achieving significant and long-lasting development results. This acknowledgement emphasizes how crucial it is to create partnerships and include local populations in decision-making processes in order to meet sustainable development objectives.



Strengths

- Local Empowerment
- Sustainable Development Outcomes
- Innovation and Adaptability
- Cultural Diversity
- Community Engagement and Social Capital



Weaknesses

- Capacity Constraints
- Coordination and Communication
- Financial Resources



Opportunities

- Partnership and Collaboration
- Community-Led Initiatives
- Knowledge Exchange
- Resource Mobilization
- Skill Transfer



Threats

- Power Dynamics and Resistance to Change
- Cultural Sensitivity
- Political Instability
- Aid dependency



Part II: A Case Study of USAID's Localization Efforts in Morocco

Section I: Methodology

1- Measuring the progress and the impact:

To effectively capture changes to its business processes, USAID will use a variety of indicators and approaches to evaluate its localization success. It helps USAID to collaborate with partners and local people to cultivate a culture of learning, assess program performance, and carefully monitor program outcomes.

The ultimate objective of the study is to provide guidance to USAID in its endeavors to empower local actors, fortify local systems, and exhibit responsiveness towards local populations.

To be at the forefront of development initiatives and efficiently measure its effects, USAID is dedicated to an ongoing process of learning from, modifying, and upgrading its framework for [measuring progress](#).

- **Performance indicators:**
 - percent of awards made to local partners.
 - percent of programs with local actors in the lead.
- **Evaluations and assessments:**
- **Reporting:** Annual Performance Plan and Report: Sustainability & Local Ownership Key Issue Narrative



USAID is employing particular metrics and benchmarks to evaluate its localization endeavors. Furthermore, a variety of techniques and strategies are being used to gauge the success of these initiatives.

USAID MEASURING LOCALIZATION

PROGRESS

- **Set targets:** 25% direct funding to local partners by Fiscal Year 2025, and 50% of direct funding by FY 2030.
- **Funding allocations:** direct funding going to local partners.
- **Local leadership of USAID programming:** space for local leadership whether they are prime awardees, subawardees, participants in a USAID-funded program, or part of a community affected by USAID programming.

RESULTS

- **Performance indicators:**
 - percent of awards made to local partners.
 - percent of programs with local actors in the lead.
- **Evaluations and assessments:**
- **Reporting:** Annual Performance Plan and Report: Sustainability & Local Ownership Key Issue Narrative



Data Collection and Analysis Methods: use of multiple methods of data collection, such as interviews, and document analysis.

The contents of the following pages have been crafted collaboratively by the dedicated members of our Local Works team. Their collective efforts, insights, and expertise have significantly contributed to the development of this section. I extend my sincere appreciation to each team member for their valuable input and commitment to excellence.

CASE STUDY: USAID/MOROCCO'S LOCALLY LED LEARNING (ML3) BPA

After five Local Works projects in Morocco came to an end in 2021, the Mission started organizing new projects. The members of the Local Works team asked themselves how they could make sure that not only their projects could be directed locally, but also assessments, evaluations, and research that would guide future efforts.

USAID/Morocco established a Blanket Purchase Agreement (BPA) for local research, evaluation, and learning facilitation services in order to accomplish this aim. Early market research and a multi-stage procurement procedure, which included an oral presentations day, were all part of the BPA process, which resulted in the designation of four local businesses and individual consultants as BPA Holders. The Mission has issued many Call Orders since the BPA was founded, including two to a local company to carry out listening tours and one to a local consultant for a gender study of the environment.

This case study aims to shed light on the requirements, attitudes, supportive environments, and procedures that motivated USAID/Morocco to establish a framework for regional assessments and research. It looks at how this mechanism used local knowledge throughout the Mission's portfolio to enhance locally led development. Thus, from April to June 2023, thirty stakeholders who took part in the development, acquisition, and execution of the Morocco Locally Led Learning (ML3) BPA were interviewed in semi-structured interviews by USAID's Local Works program team.

Stakeholders comprised four technical staff from USAID/Morocco, three team members from the Program Office, two staff members from the Office of Acquisition and Assistance (OAA), four staff members from Local Works Washington, six BPA holders, research team members, and applicants, and eleven community people who took part in listening tours. The Local Works team used a human-centered design lens and theme analysis to qualitatively assess all of the data, triangulating it with desk research and observations to create this case study.

The procedure has not been without its difficulties and has required a lot of time and energy. Nevertheless, the Mission has gained greater insight into how to work with local actors and lead research and learning initiatives more locally at each stage. More local perspectives have influenced discussions as the Mission develops and modifies relationships and activities as a result of these initiatives.

We will examine some facets of the ML3 experience via the prism of the major strategic management tenets in the next section. In order to do this analysis, it will be necessary to look at the ways in which each principle has affected the strategic choice made about the Morocco Locally Led Learning (ML3) initiative's selection for local research, assessment, and learning facilitation services. Through exploring these facets, we may get a deeper comprehension of the topic.



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Above all, the choice to start the change toward improving the cooperation with the local partners has to be made strategically. USAID Morocco has proactively modified its approach to development programs in response to the strategic management framework and its commitment to enhance engagement with local partners. With a purposeful emphasis on local leadership, the Mission launched strategic planning for new initiatives in the areas of assessment, evaluation, research, and learning services.

"How can we ensure that not only the activities themselves, but also the evaluations, assessments, and research informing future work, are all locally led?" is the crucial question that the team put up. focuses specifically on the leadership and change management component. The team showed a commitment to implementing change in a way that is in line with the strategic vision of promoting a more inclusive and locally led development approach by thinking about how to ensure local leadership not only in project activities but also in evaluations, assessments, and research.

USAID Morocco addressed the risk management component by taking proactive steps to reduce possible difficulties. Their strategy's initial action was to start doing in-depth market research to find possible actors. This meticulous investigation of the market was started with some doubts about the existence of local players that might offer the necessary services. The team was pleasantly delighted by the conclusion, though, since it showed that there was a strong Moroccan community of skilled local actors who could provide these services internally. In addition to ensuring the selection of appropriate partners, USAID Morocco received important insights into the capacities that are now present within the Moroccan environment by undertaking this extensive market study as part of a risk management plan.

Furthermore, consistent with our dedication to promoting creativity, USAID Morocco has introduced a flexible selection process for regional assessors and investigators for the Morocco Locally Led Learning (ML3) initiative. The Mission, using a painstakingly designed procedure, released a Request for Information (RFI) requesting detailed information on a variety of technical abilities, language competency, and previous experiences working with USAID and other donors.

After a thorough assessment of all the submissions, the technical team has selected a group of local assessors that include both individuals and companies. The Mission has invited the successful offerors to an exciting oral presentation day in order to further highlight the creative aspect of our selection process, after the issuance of the Requests for Quotations (RFQ). At the occasion, the selected applicants showcased their plans, and the committed USAID staff members gave educational talks to acquaint them with USAID policies and procedures.

The Oral Presentation Day provided an outstanding forum for networking and cooperation, demonstrating the creative way to interact with these regional partners. Staff from many departments, such as technical, program, OAA, and Local Works, have been involved, demonstrating a comprehensive and cooperative effort. Through its locally driven projects, USAID Morocco is positioned to achieve even greater impact and sustainability thanks to this creative approach that fosters innovation, flexibility, and adaptation.

In terms of financial management, it was a sensible choice to work with regional partners on research and assessment services. This decision gave a substantial opportunity in addition to the possibility of cost



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savings. Previously, USAID/Morocco contracted for these services from other foreign-based businesses or through the MENA MELS system, which turned out to be quite costly.

Working directly with local evaluators offers a deep understanding of the local context, which is in line with our ethical and social responsibilities. This realization led to the decision to advance locally led learning and to take advantage of local expertise in providing evaluation, assessment, and research services. This strategy takes into account the worldwide environmental component in addition to being in line with the organization's dedication to locally led growth. Thus far, the outcomes have been quite validating. Robust deliverables that have been successfully created by our local research partners have been crucial in determining the ideas and implementation of the program.

Furthermore, the communities themselves have conveyed how much they value the chance these researchers provide for them to interact with local scholars and with one another in the gathering places. These results have demonstrated the tremendous benefit of cooperation and information sharing in addition to confirming the efficacy of our strategy.

Adopting the approach of collaborating with regional assessors is consistent with USAID Morocco's larger endeavor to foster strategic alliances. Working with local evaluators is a conscious attempt to learn more about a community's requirements than is typically the case. By adopting this approach, we want to improve our comprehension of the particular difficulties and possibilities that exist in every local community. Working with local evaluators gives us important insights into the unique requirements, cultural quirks, and socioeconomic aspects that define the environment in which we operate and provide us the context-specific information we need to create our programs.

Working with local partners, however, comes with its own set of difficulties. The Mission's Human Resources are heavily burdened while collaborating with local partners to undertake USAID activities in Morocco. Working closely with local partners necessitates a significant time and energy commitment from USAID staff in order to offer ongoing capacity building and advice. For local partners who might not have professional operations, professional organizational goals, or professional practices, this "hand-holding" approach is essential. This is a coordinated team effort including the staff of the Mission, including members of the Financial Management Division, Agreement or Contracting Officer Representatives (AOR), and employees of the Office of Acquisition and Assistance (OAA).

More difficulties arise when adjusting to the requirements of regional partners. Even though English is the official working language, it's sometimes required to speak French or Arabic when interacting with local partners in order to respect their language preferences and skills. The staff's time and efforts are increased by this language adaptation, which is essential for efficient communication and teamwork. Another issue is the local partner groups' low capabilities. Among other problems found through pre-award surveys and evaluations, these hurdles can occasionally include the absence of a strategic organizational vision and strategy, a lack of operations and procedures, and a high staff turnover rate. Staff members from USAID must work tirelessly to address these capacity constraints by offering specialized support and direction.

Ultimately, juggling administrative responsibilities with USG requirements turns into a joint effort. Local partners frequently find it difficult to live up to USAID standards and fulfill award criteria, such as comprehending standard provisions, terms and conditions, award clauses, SAM registration requirements, and keeping their status current for the duration of the award's performance. Compliance with work



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schedules, branding and marketing strategies, vouchering, Value-Added Tax (VAT) regulations, and other reporting obligations adds to the complexity. Monitoring, Evaluation, and Learning Plans (MELP) are another area of complexity.

Notwithstanding the administrative challenges, Missions Human Resources makes a major effort to assist local partners in adhering to and navigating these requirements, guaranteeing the effective execution of USAID projects.

Local Works has verified that the data collected indicates that the outcomes achieved so far are highly validating, proving the value of the collaboration with regional research partners. The collaboration spaces have proven to be important for establishing relationships and exchanging expertise, which have shaped the program designs of the Mission and fostered a strong feeling of community among the local population.

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Selection of case: Morocco with the case of research initiatives implemented with local organizations.

Executive Summary

Through a variety of initiatives, missions like USAID/Morocco have made it their mission to support locally led development in recent years. Through these initiatives, local partners are given the autonomy to establish their own goals, come up with solutions, and then use their resources, leadership, and skills to put those answers into action. The Mission has started organizing new projects after five Local Works projects in Morocco were successfully finished in 2021. This has made the team think about a very important question: how can we ensure that the activities themselves, as well as the assessments, evaluations, and research that guide future efforts, are all driven locally?

USAID/Morocco decided to create a Blanket Purchase Agreement (BPA) for local research, evaluation, and learning facilitation services after carefully examining the state of local research. Early market research and the implementation of a multi-stage procurement procedure, which included an oral presentations day, were part of the BPA process. As a consequence, four regional businesses and lone consultants were chosen to become BPA Holders—that is, organizations and persons that sign a BPA with USAID Morocco. The Mission has issued many Call

Orders since the BPA's founding, including two to a local company for listening tours and one to a local consultant for a climate gender analysis.

Without a doubt, there have been difficulties along the way and a substantial time and energy commitment. Nevertheless, the Mission has learned a great deal about how to work with local actors and improve the localization of research and educational initiatives at every stage of the process. By use of these initiatives, the Mission has effectively elevated the opinions of regional stakeholders, enabling them to assume a crucial function in molding program designs and collaborations.

Thus far, the results have been quite encouraging: our local research partners have produced outstanding discoveries that have had a significant impact on the design and execution of Mission programs.

Additionally, communities have acknowledged the tremendous benefits of interacting with local scholars and one another in the collaborative venues these researchers establish.

This case study aims to provide an overview of the entire procedure and to share the important lessons discovered along the way.

Case Study Objective:

- *To uncover the needs, mindsets, enabling conditions, and processes that led USAID/Morocco to establish a mechanism for local research and evaluations.*
- *To explore how this mechanism advanced locally led development and how it was a leverage to the local expertise across the Mission's portfolio.*

Case Study Outputs:

- a comprehensive depiction that vividly illustrates the convergence of needs, mindsets, and transformative processes, resulting in the development of the ML3 BPA.
- This case study serves as a captivating narrative, exemplifying the fundamental principles of locally led development within the Mission's diverse portfolio.



The Morocco Locally Led Journey: Advancing Local Knowledge:

Beyond Conventional Models: Pushing limits and enabling progress

The USAID/Morocco Local Works team set out to push itself to operate in more locally driven ways as they began preparing for the demands of evaluation and assessment in the future. Although previously USAID/Morocco hired foreign companies to provide these services, this offered a chance to extend locally driven work beyond implementation to include monitoring, evaluation, learning (MEL), and research. The team had successfully completed a few gender analyses with local businesses in the past, and they had a good experience working with a nearby university to examine regional data that influenced the design of a new activity. Going ahead, collaborating closely with local evaluators would contribute substantial local context knowledge, especially as local partners are uniquely positioned to take advantage of robust local networks already in place. Another big opportunity was the possibility of cost reductions.

“The fact that you are collaborating with local partners means that you are benefiting from local expertise, from local knowledge, and from local networks. This is instrumental since the involvement of local knowledge helps you have a better understanding of local needs and local problems, so you can develop more relevant activities to address them.”

Nevertheless, there was originally a great deal of doubt about the availability of competent local suppliers. Monitoring and assessment are not covered in Moroccan school curricula, and no certification programs exist for them. Through practice and applied learning, practitioners get experience; they frequently do this while working for big, multinational companies. Concerns about local groups' lack of institutional ability to work directly with USAID were voiced by a few members of the Mission team. However, the Mission as a whole saw this as a chance to confirm their presumptions and gain knowledge in the process. The Office of Acquisition and Assistance (OAA) recognized possibilities to apply lessons to their larger small business engagement activities, and the technical team was dedicated to figuring out locally driven methods of working, and the Program Office was thrilled to use MEL's local expertise.

“I was not sure we would have enough local actors that could perform this work, but I was pleasantly surprised that we did. The market research was really helpful because we were surprised to see how much is out there.”

Key Steps

1- Market Research

Why we did it?

It is imperative that market research be used to validate hypotheses and direct future course of action. Acquiring a thorough grasp of the local market was our main goal in doing market research. We did this in an effort to dispel any preconceptions and obtain insightful information that would help guide our



future tactics.

How we did it?

The Mission began by creating a list of local evaluators and researchers by referencing past research, authors of reports, and published studies.

Next, two team members from Local Works Washington reached out to these contacts to learn about their core work, their methods for finding opportunities, and their networks. The Mission also contacted other donors to gather more contacts in the MEL space.

“There’s a lot of untapped potential, especially because of language. This kind of process can be applied to other capacity needs depending on the context.”

The group used a "snowball" strategy to increase its outreach by requesting referrals from new connections. They discovered that Morocco does have local capacity for monitoring, evaluation, and learning (MEL) services, but it looks different from that of multinational corporations. There are more individual consultants than assessment businesses, and opportunities and evaluators can be found through informal networks. The group also noticed that donor preferences might affect the market since they frequently enter into contracts with foreign companies that then subcontract locally, which discourages the formation of official enterprises. Young MEL professionals in Morocco, however, are keen to learn from others and advance their own abilities, even though consultant rivalry might impede the exchange of information.

What did we learn?

According to the results of the market research, there was in fact a sizable amount of local assessment and research capability in the region. This result suggested that there were already well-established organizations and people actively engaged in carrying out assessments and research initiatives.

Nevertheless, the Mission acknowledged the significance of acquiring a more thorough comprehension of the regional market in spite of this confirmation. They came to understand that having knowledge of the existence of research and evaluation capabilities was insufficient for them to formulate plans or make well-informed judgments.

Through further exploration of the local market, the Mission sought to get detailed information about a variety of topics. They sought to comprehend the major participants in the industry, their specialties, and their areas of interest. In addition, by delving further into the regional market, the Mission aimed to learn more about new patterns, shifting dynamics, and possible joint venture or partnership prospects.

Additional Related Actions

A Request for Information was released by the Mission (RFI). Expanding the purview and obtaining more specific data on the preferences, qualifications, and past experiences of specific companies and consultants is the aim of the request for information (RFI). The Request for Information (RFI) included open-ended questions on a range of technical abilities, knowledge, language competency, and previous experience working with USAID, other donors, or government funders.



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The Mission makes sure it only collaborates with highly qualified individuals by carefully screening the replies, which improves the caliber of their work and supports regional talent. After going through all 49 submissions, USAID's technical experts determined which 29 local researchers and assessors showed the most promise and inventoried them.

When recruiting local consultants for data collecting and analysis initiatives, the Missions Program Office and MEL Platform have found great use in this inventory. The Mission may now safely choose consultants with the necessary training and expertise thanks to the employment process being eased by this inventory.

2- Competition & Procurement Process

Together, the Mission's Local Works team, Program Office, and Office of Acquisition and Assistance created a list of impending learning requirements and the funding that was available. A BPA was recognized by the Mission's A&A Specialist as a versatile instrument that might facilitate a quicker and easier way to obtain local assessment and research knowledge. In order to issue a succession of call orders for research and evaluation purposes over a four (4) year period, the team created a Request for Quotations (RFQ) for a Blanket Purchase Agreement.

The team was able to restrict eligibility and use simplified acquisition procedures since each scheduled call order under the BPA fell below the \$250,000¹ Simplified Acquisition Threshold. As a result, only the short list of qualified local researchers and evaluators—who received the request in both French and English—were sent the RFQ by the Mission. There were two steps in the procurement procedure.

In Phase 1, Offerors were given a 30-day application window in which to submit a pricing schedule including labor rates, three samples of historical performance information, and a brief capabilities statement along with CVs. After reviewing submissions, an interdisciplinary Technical Evaluation Committee (TEC) comprised of people who were fluent in both French and English chose eight businesses and individuals, recommending to OAA that they proceed to Phase 2.

Phase 2 asked offerors to provide a sample of their written work, which they would then use as a basis for an oral presentation on a day in Rabat. All hands on deck was necessary for the Oral Presentations Day, which benefited greatly from the strong leadership and communication (both internally and externally

*“Overall, it was a great experience. At first, I didn’t understand the utility and I almost didn’t go....
By chance, I met colleagues [who were also there], so I felt really at ease that there were already people I knew. I also met other people who told me they had read my work. It was a moment to hear from others about their work, research, thoughts, etc. I have really fond memories of this day.”*

¹ In accordance with [AAPD 18-04](#), as this acquisition was less than \$250,000, conducted overseas and the procedures in FAR Part 13 were utilized, the opportunity was not published in the Government Point of Entry (GPE). By soliciting quotes from at least three sources to promote competition to the maximum extent practicable, the competition requirements in FAR 13.104 "Promoting Competition" and 13.106 "Soliciting competition, evaluation of quotations or offers, award and documentation" were satisfied. An additional authority the Mission explored using in this case was under [ADS 302.3.4.5.f/AIDAR 706.302-70](#), "Limiting Competition to Local Entities."



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with offerors) of the OAA team, the technical team's vision for a collaborative environment, and the enthusiastic participation of program office and technical team staff. Employees of Local Works Washington made the trip to assist with a week of planning, facilitating, and providing technical advice.

A presentation on working with USAID by OAA, oral presentations by all offerors that were available for public viewing, networking breaks, and a "Work with USAID Marketplace" where participants could get one-on-one help signing up for the System for Award Management (SAM) and talking with the Mission's technical staff and current local partners were all part of the full day program. Additionally, the day offered organized chances for offerors to collaborate and network. With headsets and on-site interpreters providing real-time interpretation in both French and English, guests were free to engage in the language of their choice for the whole event.

The Oral Presentations Day, which showcased the team's hard work and cooperation, turned out to be a highlight of the procurement process for USAID staff.

"It was wonderful. Exactly what we were looking for, in my opinion. We worked really hard to ensure it lived up to the vision of the team."

Yet, there were certain difficulties with the occasion. The TEC had to devote a considerable amount of time in the days preceding the event to reviewing the extensive written submissions that corresponded with the work offerors' presentations. In addition, there were some unanticipated technical difficulties and delays when one of the offerors wanted to switch to a virtual presenting format. It was crucial to have multilingual technical experts on site. Offerors' assessments on the Oral Presentations Day were generally favorable but somewhat circumspect. They pointed out that in order to balance this opportunity with other obligations, it would have been helpful to have had prior information on the event's timing and structure. Additionally, a lot of them had non-disclosure agreements for earlier work signed, which restricted what they could discuss in their talks.

One non-selected offeror said it was a waste of time because it did not result in more chances, while other participants considered it to be a highly competitive setting where they could hear from and learn from other researchers.

Following the meeting, the top businesses were contacted by the TEC, which had evaluated both oral and written submissions before making a final recommendation to the Contracting Officer. The four companies and consultants chosen as BPA Holders collaborated closely with the A&A and Communication Specialists to make sure they completed USAID Branding & Marking Plans and registered on SAM.gov.

Even large international organizations may find these processes difficult, but BPA holders reported that the process was easier to handle and more efficient when USAID staff members shared templates for standard documents, guided one-on-one meetings, and offered thorough feedback on preliminary drafts.

3- Implementation

In order to carry out a listening tour that centered on the relationship between Morocco's Open Government Partnership (OGP) commitments and the lives of disadvantaged communities,



USAID/Morocco released its first Request for Quotations for a Call Order under ML3. It needed a price schedule, a synopsis of the team and CVs (for new team members), and a succinct, three-page technical narrative. Out of the four BPA holders, just one applied.

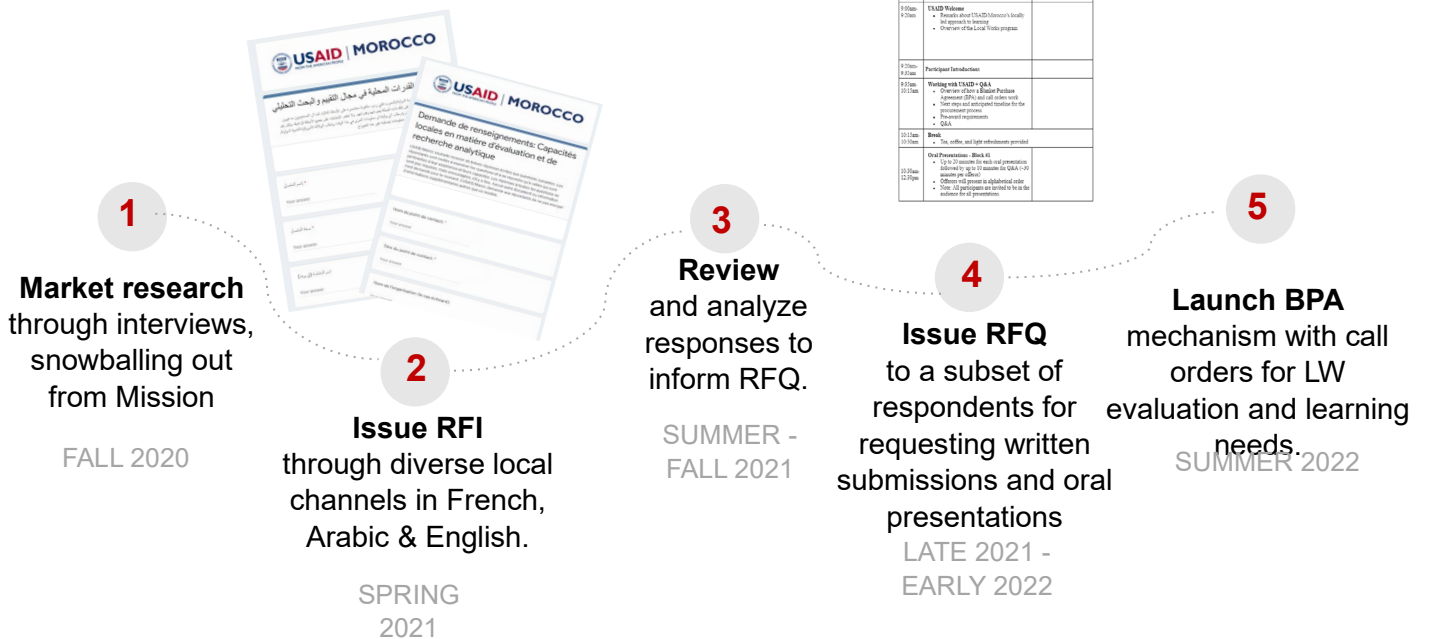
The Contractor, or BPA Holder, planned and carried out a very effective listening tour that lasted three months and involved 660 engagements. Particular, doable suggestions for how local actors would want to interact with national and regional governments about Morocco's OGP obligations were produced by the trip and data analysis.

The Mission modified its strategy for next Call Orders after taking lessons from the initial RFQ. The Mission sent a Notice of Intent (NOI) to BPA holders weeks ahead of the release of two new opportunities related to climate change programming (one for a listening tour, another for a climate gender analysis). This was done because the Mission heard from BPA holders that being aware of impending solicitations in advance would help them prioritize opportunities and manage their workload. To make sure everyone knew they could submit, the Mission made it clear that quotations would be taken in both languages when the RFQs were posted in both French and English. USAID's OAA and technical teams had a post-solicitation meeting with BPA Holders to go over the Call Order objectives and address any queries they had following the distribution of the RFQ.

It only took six weeks from the first program description draft to the award to procure the second climate change listening tour, indicating that BPAs have the ability to provide quick, on-demand technical help. A succinct three to five pages of technical narrative were needed for every call order. Offerors observed that while the brief duration assisted in helping them focus their thoughts, it occasionally made it difficult to decide which ideas to highlight.

After completing a number of call orders, such as gender analysis and listening tours, the Mission anticipates using ML3's significant local learning to guide their work.

The process in summary:



AGENDA
Morocco Locally Led Learning (ML3)
Presentation

Date	Activity Type	Participants
17:00am - 18:00am	Registration	All participants invited prior to 18:00am
18:00am - 19:00am	USAID Welcome	<ul style="list-style-type: none"> Representatives of USAID/Morocco's health and agriculture programs Chairperson of the Locally Led program
19:00am - 19:30am	Participative Introduction	
19:30am - 10:00am	Workshop with USAID - OAA	<ul style="list-style-type: none"> Chairperson of the Locally Led Program Agreement OAA and local actors Local actors and participants' reaction for the presentation program Presentations Q&A
10:00am - 10:30am	Break	<ul style="list-style-type: none"> 15 min coffee and light refreshments provided
10:30am - 11:00am	Local Presentations - Block 01	<ul style="list-style-type: none"> 15 min Presentation for each local presentation followed by up to 10 minutes of Q&A (10 minutes for OAA)
11:00am - 11:30am	Q&A	<ul style="list-style-type: none"> Open to all presenters and attendees Time for participants to ask questions to the audience from all presenters



Early Benefits

ML3 has produced thorough research to guide activity design at the mission level. As the main company for two listening tour call orders under the BPA, one of the BPA Holders produced excellent and useful learning materials that were either on par with or superior to what the Mission usually gets from foreign companies. The Mission team is impressed not only by this BPA Holder's meticulous methodology but also by his or her ability to present findings in an engaging manner. They also see how the locally led process, guided by local expertise, has assisted in identifying important community priorities with a level of specificity and nuance that is very instructive for the design of activities. This BPA Holder was "brought into the family" in a different way than most at USAID, and the team views them as a knowledge partner with whom they interact when possibilities present themselves, such as when they meet senior-level guests.

“Be confident that at the end of the day, your efforts will pay off. You do [this work] for your own country. You want to see local entities getting those capabilities they could not get elsewhere. It’s a long process but certainly rewarding. You can sense the results: for the local entities, it was successful for them, they appreciated the steps and the help we provided. For us, it paid off because we could get the results we were seeking from the beginning (e.g., learning from a listening tour). This was perfectly provided by a local entity. It’s a win-win.”

In terms of USAID’s work with local partners, work through the ML3 mechanism has **strengthened relationships between the Mission and local evaluators**. Mission staff see their work with ML3 partners as “very far to the right” on the [Locally Led Development Spectrum](#).”



One team member noted that while this effort originated with USAID, they would situate their ongoing work somewhere between *In Partnership* and *Delegated Power*, adding: “*We are close to Local Leadership because we want to give [local evaluators and researchers] the confidence that they have the skillset to do the whole process by themselves.*”

Local partners also agreed that working directly with USAID (i.e., rather than as subpartners) shifted power and decision-making towards them. One BPA holder shared: “*We’d done a few consultancies for*



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USAID before, but always as consultant-contractors to big DC-based organizations who had a contract. This was an opportunity to do the consultancy directly ourselves, without the intermediary, and everything that goes with that—freedom, flexibility, creativity, independence, control. This way, we can design and do it all our way."

The Mission and the BPA holders anticipate that as work under ML3 progresses, more alignments between local researchers' interests, networks, and skills and USAID's learning requirements will be found, opening up new leadership possibilities at the local level.

Many community members were able to discuss their objectives with USAID for the first time at the local level thanks to listening tours that were commissioned under ML3. The listening tours purposefully sought out perspectives from those who have traditionally been excluded from planning and development initiatives by utilizing local networks and knowledge. This strategy, which involves local businesses that are currently operating in the nation interacting with local communities, also creates encouraging chances for future community input.

Enabling factors

Early and cross-cutting Mission buy-in. Getting workers from technical and support offices on the same page and committed in the process early on proved vital for a smaller mission such as USAID/Morocco. The creative OAA team at The Mission was prepared to put in the time and effort necessary for a co-creative approach under ML3 and had long supported phased procurement methods. The Front Office showed support and confidence by granting prompt clearances, and office directors encouraged more locally driven methods at every stage, indicating the commitment of the leadership throughout the process. Foreign Service National employees were assisted by mission leadership in their roles as CORs, TEC members, and technical thought leaders. Staff both from Mission and Local Works Washington, were eager to put in a lot of time and effort. They supplied further assistance by doing market research, organizing oral presentations, and participating in Technology Evangelization Conferences.

"In a small(ish) Mission, you had everyone involved in this, and feeling like we were one team on the hook for success in this program."

Commitment to working in local languages. Both BPA holders and USAID employees noted that elevating local ideas and bringing in fresh, highly skilled researchers depended on the capacity to work in local languages at all levels. The RFI's translation into Arabic, French, and English gave a variety of regional experts—some of whom might not even know how to speak English—a chance to impart their knowledge to USAID. Due to market research highlighting the value of both English and French for local M&E practitioners, the Mission decided to carry out all subsequent work in both languages. This included reviewing technical applications in French, providing translated versions of the RFQ and conducting bilingual Q&A sessions, as well as translating simultaneously during the Oral Presentation day.

Open and transparent communication, both internally and with BPA holders. The Mission stated that "tons of collaboration and hard work from people, and constant back and forth among design teams" were made possible by having a clear organizational vision and agreement among team members. Over



time, the Mission team has also changed the way they communicate with BPA Holders. They have a deeper comprehension of the significance of providing partners with prior notice of Call Order possibilities and how they value thorough input on their ideas. A pause and reflect meeting with the Mission and BPA Holders in May 2023 reaffirmed the group's commitment to fostering chances for local researchers to interact and share ideas.

Challenges and Lessons Learned

- **Standing up the BPA required a significant time investment from USAID up front.** Many members of the Mission team had to devote a significant amount of time to the almost two-year-long market research phase as well as the whole design and procurement process. Given their current workloads, Mission personnel occasionally found it challenging to dedicate bandwidth. As one Mission team member noted, *“ideally, you’d have more person-power to push this forward faster.”*
- The Local Works Washington team's surge support also assisted in filling in the gaps during the Mission's MEL Specialist shortage. Other ways to get assistance for other Missions doing similar work include engaging contractors to manage events and using the market research services provided by New Partnerships Initiative (NPI). However, Missions should admit that such an endeavor does need patient and constant staff direction in order to succeed. USAID/Morocco discovered that earlier efforts to identify the appropriate BPA holders and make sure they comprehend the goals, parameters, and specifications of issued call orders might result in more efficient procurement procedures down the road.
- **The BPA mechanism and USAID’s requirements can be difficult to navigate for first-time partners.** While partners really appreciated USAID/Morocco’s hands-on support throughout the process, it was still confusing. As one BPA Holder said, *“I won’t hide anything from you, I didn’t really understand the process before. It was extremely bureaucratic. It took me a lot of time, and it wasn’t paid for. I needed to put in a lot of effort in preparing submissions, presentations, and to travel. In my opinion, there are too many steps in the process... You’ve won the selection, but there’s always another selection. This is a point that frustrates me.”* The time investment was especially frustrating for offerors who were not selected.
- **Clear and consistent communication in the local language is critical.** While USAID/Morocco’s process was overall very inclusive of local languages, the first Call Order was only issued in English. One Mission team member said, *“One of the participants... didn’t apply/submit a quotation because he did not grasp the information. So we learned that it was necessary for us to start thinking about translating the [statement of work] and other elements of the RFQ so all BPA holders are comfortable enough to participate and send their quotations.”*

The technical vocabulary used by USAID can often be problematic. According to a local partner, it's "intimidating." Future initiatives ought to focus on using straightforward language and provide a glossary. The USAID/Morocco team also discovered that it was critical to communicate with local partners at every stage of the Call Order process. This included sending out announcements prior to the Call Orders being issued, hosting Q&A sessions to walk through the submission process and clarify its scope, sharing reminders during the Call Order submission window, notifying all offerors of the Call Order winner, and giving those who are not selected the opportunity to discuss feedback.



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In-person events require smooth logistics and sufficient advance notice. Although the RFQ stated that an oral presentation day would be a component of the selection process, offerors were not informed of the precise day, time, or place until two weeks before to the event, giving them little time to get ready for their presentations and rearrange other obligations. It was also challenging for participants residing elsewhere in the nation to attend the event in Rabat, particularly because USAID did not support travel expenses. The USAID team worked tirelessly to prepare for the day of the oral presentation, which involved intricate logistics for both in-person and virtual participation as well as interpretation. The advantages of face-to-face networking and interaction will be weighed against the preparation required of participants in the future by USAID/Morocco, with specific attention paid to the opportunity cost for those who are not chosen for an award.

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VI. Conclusion of Section I.

The USAID Morocco Mission was able to improve program results by putting the ML3 BPA into practice. The Mission was able to access a plethora of information and experience that resulted in creative solutions by utilizing local experts. In addition, the ML3 process produced significant insights that other Missions may utilize to capitalize on local knowledge in their operations.

From Local Partners to USAID:	From USAID to USAID:
<ul style="list-style-type: none"> ● Give local languages top priority while discussing prospects and be willing to accept deliverables in the local tongue. ● Communicate in advance and frequently, sharing information verbally and in writing, via email and in meetings. ● Be open and honest: promptly and thoroughly comment on technical suggestions and offer explanations. ● Simplify requirements and administrative procedures as much as you can; one-on-one assistance and templates for necessary products (such branding and marking plans) are really beneficial. 	<ul style="list-style-type: none"> ● Develop spaces for in-person networking and information sharing between USAID and local researchers by using a phased procurement strategy and hosting events. ● Keep FSN staff at the center of these initiatives– FSN leadership is an essential piece of locally led development. ● Don't reinvent the wheel! Take a cue from this example and utilize the resources that are already available to you (such as market research services offered by the New Partnerships Initiative).

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Section II: Findings

Objective of Section II: Considering long-term sustainability: to evaluate the interventions' and projects' sustainability in light of the updated priorities. Evaluating how the localization may affect internal operations and projects of USAID Morocco.

I. Presenting the findings:

The United States and the Moroccan government have worked together for over 60 years to significantly improve the standard of living for Moroccan residents. In order to improve learning results across the country, USAID Morocco is committed to assisting with important reforms within Morocco's educational system. In order to better serve the needs of the populace, USAID Morocco also works to improve the efficiency, openness, and responsiveness of local governance structures. By supporting the nation's business climate, workforce development programs, group-based finance, and entrepreneurial activities, we also aim to improve Moroccans' standard of living.

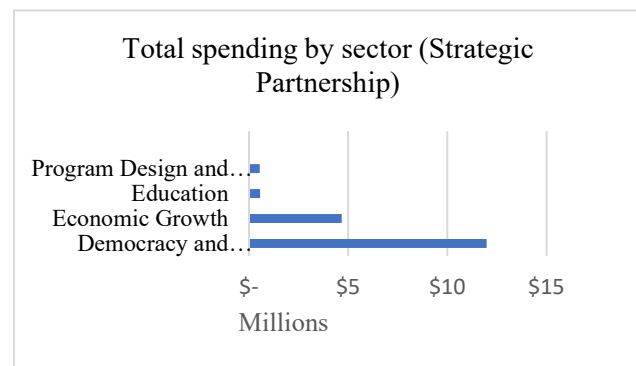
Additionally, USAID assists at-risk youth in their reintegration and provides them with the tools and resources they need to make a constructive contribution to their communities in an effort to strengthen community resilience. Finally, USAID/Morocco seeks to support initiatives to lessen the effects of climate change in Morocco, promote best practices for adaptation, and increase the resilience of communities that are vulnerable to climate change. These goals are in line with the new USAID Climate Strategy 2022–2030 and are carried out in partnership with the Government of Morocco (GOM).

As was already noted, USAID Morocco has been working with regional groups since 2010, and this relationship has continued to develop. I will discuss the report's conclusions about the effects of localization initiatives on USAID Morocco in this part. I will go into detail about how they affect three crucial facets of strategic management: financial management, human resources management, and strategic alliances.

The following visualizations were created using data that was taken from Phoenix Viewer, our financial reporting system, and covered the years 2011 through 2023.

The following chart shows that among USAID Morocco's four sectors, the Democracy and Governance sector has collaborated with local groups the most in terms of **strategic relationships**. Subsequently, the sectors of Economic Growth, Education, and Program Design and Learning follow in order. The Mission has enlisted the assistance of ML3 partners in this field to carry out listening tours, analysis, and evaluations. Furthermore, additional partners offer services for communication assistance.

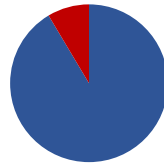
In terms of financial management, the next charts examine how LW funds are used and how much USAID Morocco spends on local groups. This data is compared to the Mission's overall expenditures as a percentage of total grants.





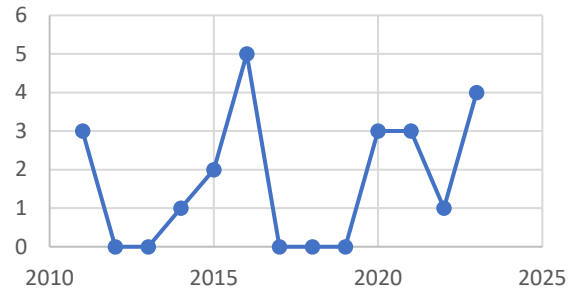
LW awards vs total awards:
2011 - FY 2023

FY



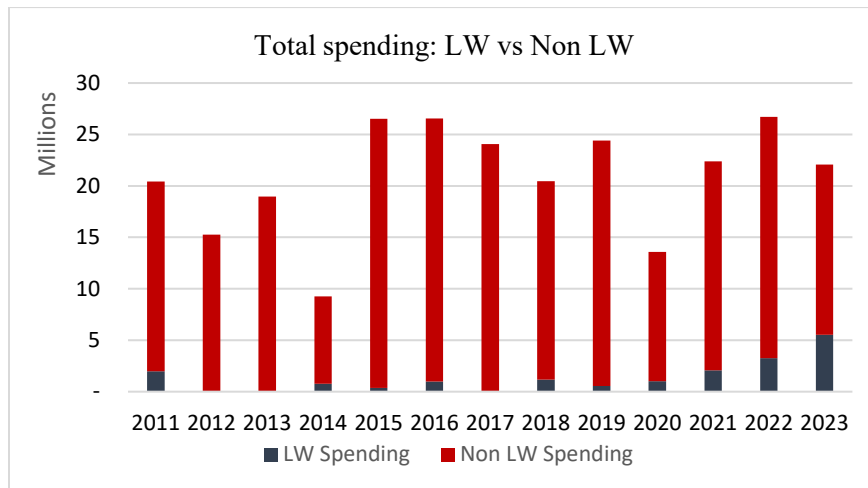
■ Total awards ■ LW awards

of LW awards from FY 2011 to FY 2023

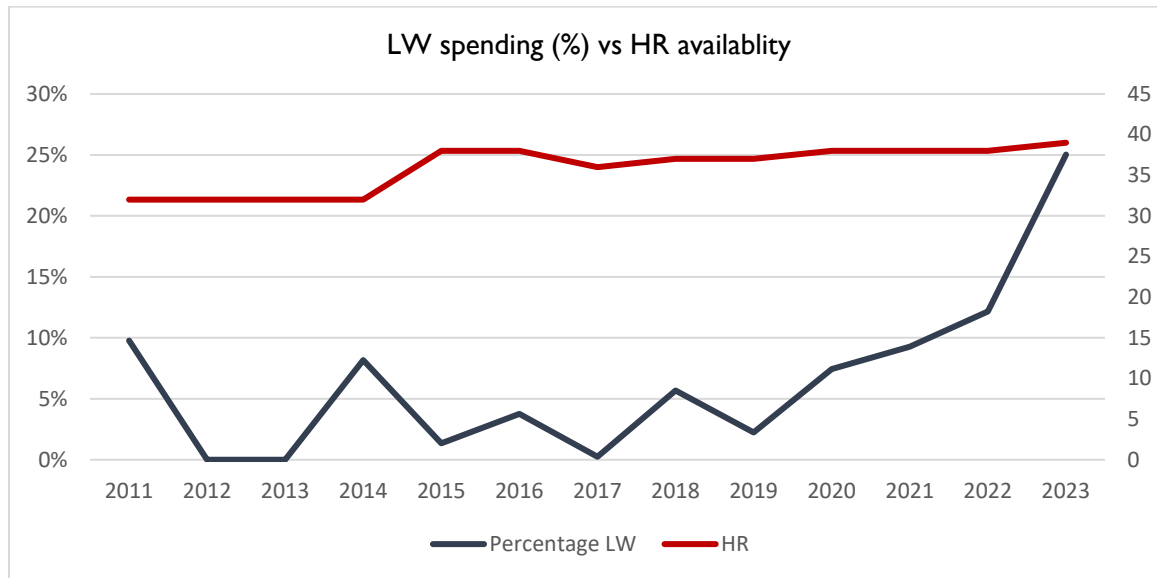


The percentage of LW grants relative to all awards made by the USAID Morocco mission between FY 2011 and FY 2023 is shown in the following graphs. Out of 235 prizes, 22 have been given to local groups by USAID Morocco over the course of over ten years. The times when the graphs show no local awards are the same as the times when the Mission was creating new activities.

On the other hand, the purpose of the following graphic is to investigate the relationship between the total amount of funds allotted to local groups and the total amount of funds spent by the USAID Morocco Mission.



Direct Local Funding for USAID Morocco came to around \$5.6 million in the fiscal year 2023, or 25 percent of total expenditures. This is the biggest growth that has been seen between the fiscal years 2011 and 2023. I will explore the link between the proportion of local awards (LW) expenditure and the available human resources in our examination of **human resources management**.



It is clear from examining the image that there was no discernible relationship between the percentage of grants given to local organizations and the number of employees at USAID Morocco. A more thorough investigation is necessary to precisely ascertain the existence and scope of this association and to facilitate future research.

In conclusion, USAID Morocco's strategic partnerships show that different levels of cooperation exist across its four sectors. The most active sectors are clearly those dealing with democracy and governance, economic growth, and education. The program design and learning sectors, on the other hand, collaborate less. The Mission provides listening tours, analyses, evaluations, and communication support services in collaboration with ML3 partners.

Nonetheless, the study emphasizes how diverse the connections that USAID Morocco has are. Financially, the examination of total expenditure and LW financing shows a continuous dedication to aiding neighborhood groups; in fact, Direct Local financing increased significantly in the fiscal year 2023.

The association between the proportion of LW expenditure and the available Human Resources at USAID Morocco remains equivocal, despite oscillations in the number of local awards over the past ten years. Therefore, more thorough research is necessary to fully understand the complexities of this relationship.

Findings with relation to the Morocco Locally Led Learning (ML3) program: looking at ML3 through the lens of Strategic Management:

The USAID/Morocco Locally Led Learning initiative exemplifies the mission's dedication to promoting locally driven development by being in line with many strategic management principles. The analysis that follows explores the relationship between the initiative and the strategic management ideas covered in this research report. After that, we will compile our observations on the current state of the localization agenda.



Strategic Management Frameworks: *Does the ML3 program reflect a strategic approach to development, emphasizing the importance of locally led programming and innovative operational approaches, as evidenced by the Local Works Program?*

Strategic management frameworks are adhered to in the BPA's establishment and local businesses and consultants chosen, since they strategically utilize local knowledge to accomplish program goals. By strategically aligning activities with wider corporate goals and priorities, this method guarantees that the programs concentrate on locally led growth. We are able to successfully accomplish our program goals and add to the overall success of our business by utilizing local knowledge.

Leadership and Change Management: *Did USAID/Morocco embrace a locally led development approach, empowering local actors in decision-making throughout priority-setting, design, management, and for its measurement processes? Did USAID/Morocco leadership embrace the shift and the change in management to support and enable local leadership effectively?*

Effective change management techniques in promoting a culture of cooperation and local ownership are reflected in the program's emphasis on empowering local actors and creating long-lasting relationships. The Mission leadership's dedication to locally led methods shows how to effectively lead organizational transformation in the direction of more inclusive and locally driven development projects.

Risk Management: *Did USAID Morocco adopt the locally led development approach in its evaluation, assessment, and learning work with local actors? Did the initiative involve adapting to and overcoming challenges, including a nuanced understanding of risk management? Were efforts made to address barriers to progress, such as reducing language barriers, providing additional training to local organizations, and implementing more realistic timelines?*

In addition to the commitment demonstrated through capacity building for local ML3 partners, the implementation of the ML3 mechanism has had a significant impact on the human resources at USAID Morocco. Since the inception phase of ML3, the dedication of the staff has been evident, with active participation from various offices including the Office of Acquisition and Assistance (OAA), Financial Management Office (FMO), Program Office, and Technical Office. Staff members have been deeply engaged from different perspectives, providing extensive support to ML3 partners.

The staff has put up an amazing amount of work throughout this process. They've taken on a variety of duties, including as helping with SAM registrations, handling vouchers, and answering VAT-related questions. In order to ensure that ML3 concepts are seamlessly incorporated into the larger USAID Morocco framework, the staff has been instrumental in helping ML3 partners.

The intensity of these efforts demonstrates the staff's commitment to ML3 program success and local initiatives in general. They also show that they are willing to use human capital for program implementation that will have an impact and to build productive collaborations.

Global Environment, Ethical and Social Responsibility: *Was this initiative a part of USAID/Morocco's commitment to engaging with local partners, promoting ethical and socially responsible practices, and supporting the global localization agenda through locally led development?*



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Through the use of regional languages and viewpoints in its work, USAID Morocco exhibits an understanding of the complexity of the local environment and the significance of application-specific strategies.

The worldwide trend toward localization and encouraging local ownership in development programs is consistent with the ML3 program's focus on involving local actors and utilizing local expertise.

Innovation: *Did USAID Morocco prioritize innovative approaches, such as co-creation methods, industry days, use of post-solicitation meetings to explain the USAID work and processes in designing the ML3 program and also for its BPA call orders?*

The procurement procedure for ML3 demonstrated creative methods in cooperation with regional assessors and investigators. This was accomplished by providing the RFI and RFQ in three languages, holding a post-request conference to elucidate the objectives of the solicitation, enabling oral presentations by the shortlisted offerors, and having USAID Morocco personnel make presentations. These actions demonstrate the Mission's dedication to empowering offerors, enhancing capacity, and removing obstacles that impede flexibility and adaptation.

The program demonstrates its commitment to advancing local knowledge and experience through inventive solutions by adopting these cutting-edge approaches.

Financial Management: *Was the ML3 program an effective method of distributing funds to local partners, with the objective of directing 25% of USAID Morocco funding directly to local actors by Fiscal Year 2025? Did this initiative align with the strategic shift in financial management to promote locally driven development?*

When hiring local partners for certain activities, the program uses a BPA and call orders for procurement, which represents good financial management techniques in resource allocation.

In addition to effectively allocating resources when enlisting local partners for specific tasks, the ML3 mechanism was also used for completing assessments in the majority of USAID Morocco's new activity designs, which demonstrated strong financial management practices. This deliberate strategy supported locally driven development and was consistent with the broader change in financial management.

Human Resources Management: *What was the impact of the ML3 mechanism on the human resources at the USAID Morocco?*

The introduction of the ML3 mechanism has had a major effect on USAID Morocco's human resources, in addition to the dedication shown by enhancing the capacity of regional ML3 partners. Since ML3's start, the Office of Acquisition and Assistance (OAA), Financial Management Office (FMO), Program Office, and Technical Office have all actively participated, demonstrating the staff's devotion. Employees have been actively involved from a variety of angles, offering ML3 partners substantial support. The staff has put in a very high amount of effort during this procedure. They have taken on a variety of duties, such as helping with SAM registrations and answering VAT-related questions. To ensure a smooth incorporation of ML3 concepts into the larger USAID Morocco framework, staff has been instrumental in helping ML3 partners with activities like navigating vouchers. The intensity of these efforts demonstrates



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the staff's commitment to ML3 program success and local initiatives in general. It also shows that they are willing to use human capital for program implementation that will have an impact and to build productive collaborations.

Strategic Partnership: *Was USAID/Morocco successful in strengthening its engagement with the different stakeholders, including the Government of Morocco, civil society organizations, and the private sector to ensure local ownership and sustainability of its programs, reflecting a strategic approach to building and maintaining partnerships with these stakeholders?*

In order to accomplish program objectives, a strategic approach to cooperation and utilizing outside knowledge is demonstrated by the formation of strategic alliances with nearby businesses and consultants through the BPA and the call orders.

The program highlights the importance of strategic alliances in supporting locally led development efforts and boosting program performance by fortifying ties with regional evaluators and partners. This long-term strategy for participation guarantees continuity and encourages local ownership.

Conclusion

To sum up, the results highlight the strategic management aspects of USAID Morocco's ML3 initiative. The program successfully integrates activities with overarching corporate objectives and makes use of local knowledge. It demonstrates a commitment to locally led development by placing a high emphasis on risk reduction, change management, and effective leadership. The program's creative methods, prudent financial management techniques, and effects on human resources demonstrate USAID Morocco's commitment to advancing regional know-how.

The ML3 program is a key component in driving the localization agenda and makes a substantial contribution to the advancement of localization initiatives. By giving local players, the chance to create their own agendas, find solutions, and carry out initiatives, this program gives them more influence. The program guarantees the utilization of local experience and capacity in research, evaluation, and learning facilitation services by including local enterprises and consultants as BPA Holders.

Additionally, local researchers and evaluators can share their expertise through the ML3 mechanism, which helps USAID/Morocco with program design and execution. This not only improves local concepts but also fortifies comprehension of local requirements and circumstances. Furthermore, the initiative facilitates inclusive decision-making processes by providing forums for local populations to communicate their objectives and viewpoints to USAID.

By allowing historically underrepresented perspectives to be heard through listening tours and other evaluations commissioned under the initiative, a more inclusive approach to development is encouraged. Finally, the difficulties the Mission has had in collaborating with local actors and putting more of a local focus on research and learning initiatives present insightful teaching moments.



II. Leveraging the findings to strengthen USAID Localization efforts.

What We Learned:

From an analysis of feedback about the existing good practices, we learned that:

Early engagement with communities is essential. Co-designing with communities during the priority-setting and design stages, according to local organizations, foreign partners, and missions, helps put programs on the right track to address local goals and strengthen local leadership. Co-creation of award wording was also seen by local partners as a beneficial approach to include their goals into design. One respondent recognized that *“participatory processes are expensive and time-consuming.”* Yet, the respondent stated, they are *“a worthy outcome, not just a means to improve implementation.”* Another respondent suggested, *“involving the community is the key to have long-term impacts from any projects. Make sure that your project involves the community at various stages; this will give them ownership of the project.”*

There is **huge support for shifting power to local communities through direct partnerships.** *“USAID should try by all means to avoid middlemen in project implementation.”* Local and international organizations alike jointly recognized that money is power, and that being a prime-awardee or contractor makes a big difference in an organization’s ability to shape programming. At the same time, there was a recognition that partnering with USAID directly is *challenging*, and requires organizations to have systems, staff, and processes in place to meet award requirements. Several respondents pointed to the importance of right-sizing award amounts for new organizations; accompanying new organizations through the partnering process; and exploring flexible or transition award models to strengthen local organizations’ capacity.

There is a deep appreciation for asset-based approaches. Feedback highlighted the recognition that local actors have capacity and USAID should adopt asset-based approaches to leverage the depth of resources and skills already found in communities. One INGO underscored the need to implement [USAID’s Local Capacity Strengthening Policy](#), saying the approach it lays out *“not only enhances partner performance against their missions and mandates, but also fosters more meaningful and equitable partnerships between local and national actors and their international counterparts.”*

We also received ideas for good practices beyond the initial list of 30, as well as feedback that highlighted the importance of *how any of these practices are implemented as critical to whether or not they meaningfully elevate local leadership.* That is, these actions, in and of themselves, are not enough.

- We heard that USAID needs to prioritize **inclusion** and ensure processes are transparent and rooted in communities. *“These actions could be meaningful or partially meaningful: it’s all about whether local communities have ownership of those steps.”*
- Local organizations would also like to see more **capacity strengthening opportunities** that specifically strengthen their abilities to navigate USAID systems and requirements. They pointed



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out this type of support would not only be valuable for their work with USAID, but also for their ability to attract other donor funds.

- “**Flexibility**” doesn’t stop with the type of award instrument. Flexibility can and should be incorporated in implementation through adaptive management—which requires open-mindedness and a degree of risk tolerance on the part of USAID staff.
- USAID has the ability to make everyday changes in **its business practices** that would better support the work of local partners; this includes reducing reporting requirements (e.g., focus on biannual or annual reporting in lieu of quarterly reporting), and working more in local languages (across solicitations, reports, websites, and success stories).

How We Applied What We Learned:

The USAID Localization Working Group reviewed the most prioritized actions (both those on our original list, and new actions shared during consultations), and grouped them into four main categories of good practices that will be tracked under the new Locally Led Programs indicator:

- **Working Directly with Local Partners:** USAID undertakes activities that are implemented by local partners as prime awardees or by host country governments. Counting this specific action as its own category recognizes how significantly local organizations view direct partnership as an opportunity to shift power and encourages USAID to prioritize it in accordance with Agency policy and to the greatest extent practicable.
- **Creating Effective Local Partnerships:** USAID co-designs and co-creates activities in ways that elevate local decision making, support mutuality, and promote reciprocal trust and accountability. This category recognizes *how* USAID works directly with local partners matters when it comes to promoting local leadership, from co-design in early stages to long-term flexibility during activity implementation.
- **Recognizing, Leveraging, and Strengthening Local Capacity:** USAID invests in strengthening local capacity, and in leveraging and elevating existing capacity, local knowledge, and expertise in the places where we work. This category will count a range of capacity strengthening approaches and recognize that it may come in the format of development programming or through significant subawards or transition awards to local actors.
- **Engaging Communities Directly:** USAID uses inclusive and participatory approaches throughout its programs, including direct engagement of USAID staff with local partners and communities. This category echoes the importance of “taking out the middleman,” and promotes direct engagement with local communities through long-term engagement and relationship building, from the conception of activities to their implementation, through monitoring and evaluation. This category also elevates elements of inclusion that were so often raised throughout consultations.



I. Conclusion of Section II.

We understand that keeping track of these best practices, individual acts of USAID employees, and USAID-funded projects is only a small portion of what it takes to really make sure local partners and the people they support are driving development initiatives in their own settings. One thing to keep in mind is that there are many ways USAID programs can foster local leadership; not all of them are readily measurable or closely linked to a specific activity. This is not an exhaustive list of methods or practices that do so. It will also be crucial to concentrate on the "how" and make efforts to guarantee that the communities and local partners we collaborate with are impacted positively by these measures. With this indicator, we are holding ourselves to account for making progress on our commitment of elevating local leadership.

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Part III: Conclusion

Recommendations for how USAID can improve its localization efforts by considering the strategic management dimensions.

Within the Agency, USAID/Morocco is leading the way in locally driven development, figuring out how to have an impact in a complex and varied development context while working with a tight budget. It was among the first Missions to participate in the USAID-sponsored Local Works Program in 2015, which gives funding to Missions to explore locally produced programs and creative operating strategies.

Applying a locally driven development strategy presented some problems for USAID/Morocco, especially in the early phases. Even though some of these still exist, the Mission and its local partners have devised special strategies to deal with these problems and get over obstacles to advancement.

Based on its experiences with the Local Works Program and related efforts, USAID has identified a set of recommendations to strengthen locally led development efforts.

In general:

- **Presentations to promote WorkwithUSAID.org website for local organizations** as the place for USAID staff and partners to connect, engage, and learn more about doing business with USAID.
- **Recommend that new local organization conduct the pre-engagement self-assessment**, which is a self-guided tool that allows organizations to check their readiness to partner with USAID. The report that is then generated after completing the assessment will provide them with specific resources and training to strengthen their organization's capacity.
- **Reducing the burden on the staff to conduct the Non-US Pre Award Survey (NUPAS)**, which is a mandatory assessment that the USAID mission must conduct on any new local entity who has not previously worked with a U.S. organization in the five previous years. This can be completed by hiring CPA firms that can conduct the survey and/or other types of assessments on the behalf of USAID.
- **Create virtual or hybrid learning modules to manage funds** based on an assessment of organizations and type of award envisioned, i.e. FAAs, Cooperative Agreements, etc. Learning modules should consider results from Partner Landscape Assessment analysis on organizational needs: Monitoring and Evaluation systems, Communication skills, Financial Management, Human Resources Management, and other modules of interest.
- **Formation of a USAID team to provide training in French, Arabic, and English on specific USAID requirements** in Monitoring, Evaluation & Learning, financial, audit, procurement, performance reporting, CLA, gender, and other areas as part of preparing the implementing partner's staff to managing their award with USAID. The training can be conducted once or twice a year.



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- **Streamlining selection of awardees under the Annual Program Statements (APS): This can include** taking into consideration the lessons learned from previous procurements. The Merit Review Committee can use simplified selection criteria templates for the evaluation of concept papers. Use of co-creation sessions to help the Applicants develop their Full Application and understand the requirements that are necessary to work with USAID including the different reporting requirements.
- **Streamline procurement processes to make them more effective, efficient, and adapted to the local context.** This includes reducing language barriers during the procurement process, increasing the time for proposal drafting during the solicitation process, using more co-creation methods that encourage involvement of local organizations, or providing more training to local organizations on how to partner with USAID.
- **Be creative in capacity building.** There is no one-size-fits-all approach. The Mission can also see the help of Institutional Support Contractors or hire external consulting organizations to help develop the capacities of new local organizations that have never worked with USAID to meet requirements related to accounting, audit, records, USAID compliance with standard provisions, Finance, Human Resources, Procurement, Monitoring and Evaluation, and other areas as applicable.
- **Develop strong, trust-based relationships with local partners** to facilitate adaptive management of complex programming, including between local partner organizations and USAID Activity Managers and Contract/Agreement Officer Representatives (AOR/CORs).
- **Work collaboratively with local partner organizations to adaptively manage activities.** A co-creation approach should be used throughout the whole project cycle. An adaptive management is not about changing goals during implementation, it is about changing the path to achieve those goals in response to shifting realities. AORs/CORs should periodically consult with local partners to review/re-validate the theory of change of the activity, check assumptions, and then, if needed, adjust the Monitoring, Evaluation, and Learning and work plans based on new information and lessons learned.
- **Build in greater flexibility in awards to local organizations.** This could include:
 - Increasing budget flexibility: Use the appropriate award mechanism. This can be done by developing milestones that will help to fund the next milestone, or alternating performance milestones and administrative milestones (i.e., submit a quarterly report). This enables the local organization to have a reasonable cash flow to meet the next milestone.
 - Adding option years into awards or increasing an activity timeline via a follow-on award, or a transition award.
 - Building in pause and reflect periods, which allows to regularly stop and reflect on the implementing partner's work, identify what is working and what needs adapting, and consider the impact of changes in the operating environment or context.
- **Ensure that leaders appreciate the management burden of implementing locally led development** across the Mission, not just on the team managing the project. Leaders can:



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- Apply approaches/mechanisms that alleviate the management burden and thus incentivize locally led development. For instance, all staff might be involved in a pre-award survey (NUPAS), or a local accounting firm could be hired to administer it and build local organizations' financial and operational capacity prior to them receiving an award and being responsible for tracking the use of U.S. taxpayer dollars.
 - Apply a phased approach. The local organization could receive a small amount of funds at first, which would increase as they demonstrate their performance and financial/operational ability. When providing assistance awards, performance is based on the local organization's intentions, objectives, and long-term strategic vision.
- **Reduce or revise requirements in order to enable/increase adaptability.** Missions need more space to be nimble and flexibly engage with local organizations. They want to be responsive to local organizations' goals and needs, but often feel constrained by the requirements to which they need to respond.

For USAID Morocco

Several steps have been taken by USAID Morocco to guarantee the success of its localization initiatives and to work with local groups in an efficient manner. The strategic management dimensions—risk management, ethical and social responsibility, leadership and change management, innovation, financial management, human resources management, and strategic partnerships—that are covered in this study article are all in line with these measurements. USAID Morocco hopes to improve its cooperation with local groups and eventually have the intended sustained impact by concentrating on these important areas.

- **USAID as the convening Power:** Encourage and facilitate conversations between participants who are seeking partnerships or collaborations. USAID can assist in facilitating these connections.
USAID plays a crucial role in promoting partnerships and collaborations among local actors, a key component of the localization initiative. This approach emphasizes the importance of local ownership and engagement in development efforts.
 - By supporting these interactions, local actors can establish meaningful partnerships, creating a collaborative environment that is conducive to effective development outcomes.
- **Communication through innovation and use of technology:** USAID recognizes the importance of communication with our partners and strives to utilize innovative technology to facilitate this process. We employ various methods to ensure that our partners are well-informed and have the opportunity to provide feedback early in the procurement process. This includes issuing Notices of Intent, Requests for Information, and utilizing Google Forms to gather information about participants and their organizations. Additionally, we conduct pre-solicitation and post-solicitation virtual meetings to further enhance communication and collaboration.
 - By utilizing effective communication strategies, we strive to cultivate robust and transparent relationships with our partners by utilizing effective communication strategies.



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- **Enhancing Accessibility to USAID Resources and Processes:** Our goal is to streamline access to USAID resources and improve understanding of our processes. To achieve this, we conduct presentations to introduce applicants to the available resources for obtaining information about USAID. We also ensure that all externally shared documents include explanations of USAID acronyms and are free of technical jargon. This approach will help new organizations grasp the requirements and terms of solicitations and awards more easily. Clear communication and accessibility are paramount in all our interactions with external parties. We recognize that our use of acronyms during presentations may be confusing for new applicants. While the processes may be clear to us, we understand that they may appear complex to others, and it is important to avoid assuming that certain aspects of USAID processes are obvious to all applicants.
 - ➔ By simplifying information and providing explanations for USAID acronyms, we aim to prioritize clarity and foster a more inclusive and engaging environment for local actors to fully comprehend and engage with the content presented.
- **Enhancing our procedures and processes to be more context-specific:** utilizing the local language whenever feasible to ensure that our requirements in the solicitations are clearly understood by prospective applicants. Additionally, USAID is taking the necessary steps to provide ample time for applicants to prepare for the various events and phases of the procurement process, particularly when collaborating with local stakeholders. Allowing sufficient time is essential as it acknowledges the potential challenges faced by local actors, such as limited resources or varying organizational structures.
 - ➔ By allowing sufficient time, we demonstrate a commitment to fairness and inclusivity, recognizing that different organizations may require different timelines to ensure their meaningful participation.
- **Establish a Tiger team:** Select a representative from each office within the USAID Morocco Mission, including representatives from OAA, PMO, FMO, MEL, and other offices who fully supports the locally driven approach and is committed to offering ongoing expertise beyond the signing of the award. Providing feedback and sharing evaluation outcomes with participants is crucial for their ongoing development and enhancement.

Additionally, organizing a post-award meeting involving representatives from all offices ensures a thorough understanding and commitment to the award. This meeting facilitates detailed presentations and discussions on the various components of the award, fostering a collaborative and comprehensive approach to its implementation.

 - ➔ By sharing evaluation results, participants can gain valuable insights into their performance, enabling them to learn, adjust, and improve their future proposals.
- **Streamlining the procurement processes:** To enhance efficiency in procurement processes, it is recommended to request essential documents such as concepts, capabilities statements, and a basic budget upfront. This approach not only alleviates the workload for applicants but also prevents unnecessary waste of their time, effort, and resources.
 - ➔ By streamlining the initial requirements, we can ensure a smoother and more effective procurement process for all parties involved.



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- **Remain flexible whenever possible:** It is important to keep in mind that many organizations and consultants may be collaborating with USAID for the first time and could potentially feel overwhelmed by the multitude of requirements and steps involved. As a guide, it is essential to assist participants in preparing proposals and budgets by clearly explaining the requirements and evaluation criteria. It is common for participants to prioritize winning an award over fully comprehending and meeting the necessary criteria.
 - ➔ By maintaining flexibility and fostering collaboration with applicants, we guarantee a smooth and efficient procurement process.
- **Hold your breath;** prepare yourself for a challenging yet highly rewarding journey ahead.

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