

GLOBAL AFFAIRS CANADA'S
EVALUATION DIVISION

LOCALIZATION ANALYSIS FRAMEWORK

May 2024

evaluation@international.gc.ca



Global Affairs
Canada

Affaires mondiales
Canada

Localization Analysis Framework



Introduction to the Localization Analysis Framework

What is the localization analysis framework?

- ◆ Global Affairs Canada (GAC) developed the localization¹ analysis framework as an evaluation tool to measure a program's alignment with a locally led development approach and to identify key relevant barriers and enablers.
- ◆ It encompasses 9 dimensions (see next section). Each dimension represents one unique component of locally led development. However, there are interlinkages and complementarities between them. The framework supports a holistic view of locally led development and recognizes that there are important trade-offs that donors and/or intermediaries must consider. Thus, a program's full alignment with all 9 dimensions may not always be possible and may not be necessary to demonstrate its commitment to locally led development.
- ◆ The framework was informed by the existing body of literature focusing on defining, understanding and measuring locally led development (see "Sources" section for details). In addition, multiple consultations and presentations on the draft framework have taken place with both internal and external stakeholders; all feedback has been considered and leveraged to improve the framework's quality and usefulness. The framework remains an evergreen tool and will be continuously developed through applications in future evaluations as well as through evolving policies, evidence and best practices related to locally led development programming.

Why did GAC create this framework?

- ◆ Canada is committed to locally led development, in line with its Feminist International Assistance Policy and principles of development effectiveness. Efforts are being made to bolster its learning and evidence base on locally led development, including exploring how to best move the agenda forward. However, there is a limited availability of relevant tools to accurately measure how well Canada's programming aligns with a locally led development approach.
- ◆ GAC's Evaluation Division designed and piloted this framework between June 2022 and April 2023 to inform two evaluations of programs with a focus on supporting local organizations: the Canada Fund for Local Initiatives (CFLI) and Women's Voice and Leadership (WVL).
- ◆ The primary goal of the framework was to start building an evidence base to help answer the question: "*How well is the department really doing with regards to locally led development programming?*"

How did GAC use it?

- ◆ The pilot study was based on a desk review of data already collected for the CFLI and WVL program evaluations, drawing on multiple sources and methods. The evaluation team analyzed the data against a set of indicators developed for each of the four levels of alignment in the rubric. Each program was given an alignment score under each dimension, along with an evidence-based justification.
- ◆ In 2023-24, an updated version of the framework was integrated directly into the design of the Partnership for Gender Equality (PGE) evaluation. Both primary and secondary data were collected and analyzed against the 9 dimensions which fed into the evaluation's findings.
- ◆ Insights from this analysis to date have enabled GAC to better understand how the international assistance ecosystem, including both internal and external factors, have contributed to or hindered locally led development programming.

¹ Although a common definition of "localization" or "locally led development" does not yet exist, it is broadly understood by Global Affairs Canada (GAC) as: "shifting decision-making, resources, power, capacity and project management to local partners, including national and subnational governments, and/or national and local CSOs." (GAC International Assistance Policy Coordination Division, 2022) The framework uses both of these terms interchangeably.

THE LOCALIZATION ANALYSIS FRAMEWORK

This section presents the framework’s 9 dimensions of locally led development. Each dimension includes its own rubric consisting of four levels of alignment. Each level contains one or more indicators for data collection and analysis.

Dimension 1

Partner organizations were local

“Partner organizations” are organizations that are responsible for the design and delivery of programming based on a signed agreement with the donor²; “local” refers to organizations that:

- ◆ Are managed and governed by nationals of the recipient country or by non-nationals from a specific beneficiary group (e.g. refugees) AND
- ◆ Are generally based in the recipient country and focus their work principally on national, sub-national and/or community-based issues in the recipient country.

Good Alignment	75-100% of partner organizations were local organizations.
Partial Alignment	50-75% of partner organizations were local organizations.
Poor Alignment	Less than 50% of partner organizations were local organizations.
No Alignment	None of the partner organizations were local organizations.

Dimension 2

Funding provided to local organizations

Funding includes all monetary disbursements provided to local organizations. Funding can be “direct” through financial agreements between the donor and the local organization or “indirect” through intermediary organizations³. The level of funding is calculated based on the proportion of funding provided by the donor that is allocated to local organizations.

Good Alignment	75-100% of funding was provided to local organizations.
Partial Alignment	50-75% of funding was provided to local organizations.
Poor Alignment	Less than 50% of funding was provided to local organizations.
No Alignment	Funding was not provided to local organizations.

² Donor: An organization that provides the source of investment for a project or program and are signatories to a financial agreement with the partner organization(s).

³ Intermediary organization: An organization that plays an intermediary role between the donor and the local organization; the intermediary organization is the signatory to a financial agreement with the donor that subsequently provides funding directly to a local organization for relevant programming.

Nature of partnerships

The nature of partnerships describes the relationship between the local organization and their direct partner⁴. Partnerships are assessed based on their level of mutual trust, respect and support.

Good Alignment

*The relationship between the direct partner and local organization encompasses **all three** elements.*

- ◆ Extends beyond project-based activities⁵
- ◆ Utilizes established mechanisms to address concerns effectively
- ◆ Is based on trust and mutual respect, according to local actors⁶ themselves

Partial Alignment

*The relationship between the direct partner and local organization encompasses **two of three** elements.*

- ◆ Extends beyond project-based activities
- ◆ Utilizes established mechanisms to address concerns effectively
- ◆ Is based on trust and mutual respect, according to local actors themselves

Poor Alignment

*The relationship between the direct partner and local organization encompasses **one of three** elements.*

- ◆ Extends beyond project-based activities
- ◆ Utilizes established mechanisms to address concerns effectively
- ◆ Is based on trust and mutual respect, according to local actors themselves

No Alignment

*The relationship between the direct partner and local organization **does not encompass any** of the following elements.*

- ◆ Extends beyond project based activities
- ◆ Utilizes established mechanisms to address concerns effectively
- ◆ Is based on trust and mutual respect, according to local actors themselves

⁴ Direct partner: An organization that holds a signed financial agreement with the local organization. This may be the donor or an intermediary organization.

⁵ Project: For simplicity, the term “project” was used in the framework to describe the intervention being implemented and the object of the assessment. However, “project” can be interchanged with other terms such as “program”; “initiative”; “intervention”, etc., depending on donor and/or context-specific terminology.

⁶ Local actors: Not limited to partner organizations and can include partner organizations, beneficiaries/rights holders, local community members, local authorities/governments, local institutions (e.g. academia, civil society) and local subject matter experts.

Degree of local ownership and leadership – Project Design

This dimension reflects the level of ownership and leadership taken on by local actors during the initial design phase of a project. It also includes the degree to which the design reflects local needs and priorities⁷ based on consultations at the local level.

Good Alignment *Relevant local actors had **significant** responsibilities in project design.*

- ◆ Relevant local actors **fully led** the project design process
- ◆ Funding/project selection was **not conditional** on meeting donor-imposed criteria and/or priorities
- ◆ Project design involved **meaningful consultation** with relevant and diverse local actors
- ◆ Project design **addressed** local needs and priorities as identified by local actors

Partial Alignment *Relevant local actors had **partial** responsibilities in project design.*

- ◆ Relevant local actors **partially led** the project design process
- ◆ Funding/project selection was **not conditional** on meeting donor-imposed criteria and/or priorities
- ◆ Project design involved **moderate consultation** with relevant and diverse local actors
- ◆ Project design **partially addressed** local needs and priorities as identified by local actors

Poor Alignment *Relevant local actors had **minimal** responsibilities in project design.*

- ◆ Relevant local actors **did not lead** the project design process
- ◆ Funding/project selection was **conditional** on meeting donor-imposed criteria and/or priorities
- ◆ Project design involved **minimal consultation** with relevant and diverse local actors
- ◆ Project design **minimally addressed** local needs and priorities as identified by local actors

No Alignment *Relevant local actors **did not have** responsibilities in project design.*

- ◆ Project design process was **led by non-local actors**
- ◆ Funding/project selection was **conditional** on meeting donor-imposed criteria and/or priorities
- ◆ Project design **did not involve consultation** with relevant and diverse local actors
- ◆ Project design **did not address local needs and priorities** as identified by local actors

⁷ Local needs and priorities: Refers to the needs and priorities as defined directly by local actors as well as in consideration of the country's development, humanitarian, peace building and/or security needs and priorities.

Degree of local ownership and leadership – Project Management

This dimension reflects the level of ownership and leadership by local actors in the day-to-day decision-making that takes place during implementation. It also considers the degree to which local actors continue to be consulted throughout the duration of the programming cycle.

Good Alignment *Relevant local actors had **significant** responsibilities in project management.*

- ◆ Day-to-day decision-making on project management was **fully led** by relevant local actors
- ◆ Non-local actors **did not have responsibilities** for project management
- ◆ Throughout project implementation, there was **meaningful consultation** with local actors, including local experts and beneficiaries/rights holders (e.g. project activities and decisions were built on, informed by, and/or led by local actors)

Partial Alignment *Relevant local actors had **partial** responsibilities in project management.*

- ◆ Day-to-day decision-making on project management was **partially led** by relevant local actors
- ◆ Non-local actors had **minimal responsibilities** for project management
- ◆ Throughout project implementation, there was **moderate consultation** with local actors, including local experts and beneficiaries/rights holders (e.g. input into project activities and decisions by local actors)

Poor Alignment *Relevant local actors had **minimal** responsibilities in project management.*

- ◆ Day-to-day decision-making on project management was **not led** by relevant local actors
- ◆ Non-local actors **had significant** responsibilities for project management
- ◆ Throughout project implementation, there was **minimal consultation** with local actors, including local experts and beneficiaries/rights holders (e.g. limited to validating project timelines/activities, etc.)

No Alignment *Relevant local actors **did not have** responsibilities in project management.*

- ◆ Day-to-day decision-making on project management was **led by non-local actors**
- ◆ Throughout project implementation, there was **no consultation** with relevant local actors

Degree of local ownership and leadership – Project Governance

This dimension reflects the degree to which local actors participate in the project’s governance structures (e.g. a steering committee) and the level of decision-making power that they have over the project’s strategic direction.

Good Alignment *Relevant local actors had **significant** responsibilities in project governance.*

- ◆ Project governance was **fully led** by relevant local actors
- ◆ Non-local actors **did not have responsibilities** in project governance
- ◆ Project governance bodies/committees included **meaningful representation/participation** from local actors, including local experts and beneficiaries/rights holders (e.g. project governance decisions were built on, informed by, and/or led by local actors)

Partial Alignment *Relevant local actors had **partial** responsibilities in project governance.*

- ◆ Project governance was **partially led** by relevant local actors
- ◆ Non-local actors had **minimal responsibilities** in project governance
- ◆ Project governance bodies/committees included **moderate representation/participation** from local actors, including local experts and beneficiaries/rights holders (e.g. input into project governance decisions by local actors)

Poor Alignment *Relevant local actors had **minimal** responsibilities in project governance.*

- ◆ Project governance was **not led** by relevant local actors
- ◆ Non-local actors had **significant responsibilities** in project governance
- ◆ Project governance bodies/committees included **minimal representation/participation** from local actors, including local experts and beneficiaries/rights holders (e.g. limited to being informed and/or validating governance committee decisions, etc.)

No Alignment *Relevant local actors **did not have** responsibilities in project governance.*

- ◆ Project governance was **led by non-local actors**
- ◆ Project governance bodies/committees **did not include representation/participation** from local actors, including local experts and beneficiaries/rights holders

Degree of local ownership and leadership – Monitoring, Evaluation and Learning (MEL)

This dimension reflects the degree to which MEL processes and activities were designed based on locally appropriate and context-specific indicators, tools, frameworks as well as the added value provided to local actors. It also refers to the degree of meaningful ownership, leadership and participation from relevant local actors in MEL processes and activities.

Good Alignment *Relevant local actors had **significant** responsibilities in MEL activities.*

- ◆ Local actors **fully led** MEL activities
- ◆ MEL activities included **meaningful participation** from relevant and diverse local actors
- ◆ MEL activities created data and products of **significant value** for relevant and diverse local actors
- ◆ MEL activities were **fully designed** based on locally appropriate indicators, tools, frameworks, etc.

Partial Alignment *Relevant local actors had **partial** responsibilities in MEL activities.*

- ◆ Local actors **partially led** MEL activities.
- ◆ MEL activities included **moderate participation** from relevant and diverse local actors
- ◆ MEL activities created data and products of **moderate value** for relevant and diverse local actors
- ◆ MEL activities were **partially designed** based on locally appropriate indicators, tools, frameworks, etc.

Poor Alignment *Relevant local actors had **minimal** responsibilities in MEL activities.*

- ◆ Local actors **did not lead** MEL activities
- ◆ MEL activities included **minimal participation** from relevant local and diverse actors
- ◆ MEL activities created data and products of **minimal value** for relevant and diverse local actors
- ◆ MEL activities were **minimally designed** based on locally appropriate indicators, tools, frameworks, etc.

No Alignment *Relevant local actors **did not have** responsibilities in MEL activities.*

- ◆ Local actors **did not lead** MEL activities
- ◆ MEL activities **did not include participation** from relevant local actors
- ◆ MEL activities **did not create data and products of value** for relevant and diverse local actors
- ◆ MEL activities were **not designed** based on locally appropriate indicators, tools, frameworks, etc.

Relevance of capacity strengthening support

The existing capacity of local organizations must first be clearly understood and recognized by the donor and/or intermediary organization(s). The relevance of capacity strengthening support is then contingent on leveraging and respecting existing local capacity as well as local systems, cultures and structures in order to support organizations with activities that reflect local needs and priorities and which also leverage other relevant local actors in their delivery.

Good Alignment

*Capacity strengthening support was **significantly** relevant to local organizations' needs and priorities.*

- ◆ The capacity of local organizations was **fully understood, recognized and leveraged** by donors/intermediaries in the design and delivery of capacity strengthening activities (activities were not provided if there was sufficient local capacity)
- ◆ Local systems, cultures, structures and relevant actors were **fully respected and leveraged** in the design and delivery of capacity strengthening activities
- ◆ Capacity strengthening activities **fully reflected** local needs and priorities, as defined by local actors

Partial Alignment

*Capacity strengthening support was **partially** relevant to local organizations' needs and priorities.*

- ◆ The capacity of local organizations was **partially understood, recognized and leveraged** by donors/intermediaries in the design and delivery of capacity strengthening activities
- ◆ Local systems, cultures, structures and relevant actors were **partially respected and leveraged** in the design and delivery of capacity strengthening activities
- ◆ Capacity strengthening activities **partially reflected** local needs and priorities, as defined by local actors

Poor Alignment

*Capacity strengthening support was **minimally** relevant to local organizations' needs and priorities.*

- ◆ The capacity of local organizations was **minimally understood, recognized and leveraged** by donors/intermediaries in the design and delivery of capacity strengthening activities
- ◆ Local systems, cultures, structures and relevant actors were **minimally respected and leveraged** in the design and delivery of capacity strengthening activities
- ◆ Capacity strengthening activities **minimally reflected** local needs and priorities, as defined by local actors

No Alignment

*Capacity strengthening support was **not relevant** to local organizations' needs and priorities.*

- ◆ The capacity of local organizations was **not understood, recognized, nor leveraged** (and/or undermined) by donors/intermediaries in the design and delivery of capacity strengthening activities
- ◆ Local systems, cultures, structures and relevant actors were **not respected and leveraged** (and/or undermined) in the design and delivery of capacity strengthening activities
- ◆ Capacity strengthening activities **did not reflect** local needs and priorities, as defined by local actors

Administrative capacity and requirements

Donor and/or intermediary administrative capacity refers to the level of human resources and their relevant knowledge, skills and experience that are available to directly support locally led development programming. In addition, administrative requirements⁸ imposed on local organizations are considered based on the degree to which they enable or hinder project delivery and results.

Good Alignment	Donor/intermediary administrative capacity and requirements fully allowed programming that responded to local needs, including those of the most marginalized.
Partial Alignment	Donor/intermediary administrative capacity and requirements partially allowed programming to respond to local needs, including those of the most marginalized.
Poor Alignment	Donor/intermediary administrative capacity and requirements minimally allowed programming to respond to local needs, including those of the most marginalized.
No Alignment	Donor/intermediary administrative capacity and requirements did not allow programming to respond to local needs, including those of the most marginalized.

⁸ Donor/intermediary requirements can include but are not limited to: risk appetite/risk tolerance; contractual/accountability requirements; funding eligibility requirements; application/selection process; and other institutional/structural/legal factors.










How to apply the Localization Analysis Framework

The localization analysis framework is flexible and adaptive and can be applied in various ways:

Backward-looking applications: The framework was designed primarily as an evaluation tool to systematically assess how well an intervention performed against the 9 locally led development dimensions and to identify key barriers and enablers through the collection and analysis of relevant primary and secondary data.

Forward-looking applications: The framework can support international assistance programming in other phases of the programming cycle. For example, the 9 dimensions can be leveraged in an intervention’s design phase to identify what data is needed to better plan, monitor and report on progress from a locally led development perspective.

The following is an example of a backward-looking application of the framework:

Dimensions of locally led development	Rating	Example justification
 D1 Partner organization	None (white) Poor (light green) Partial (medium green) Good (dark green)	The signatories to the contribution agreement were Canadian organizations (intermediaries).
 D2 Funding provided to local organizations	None (white) Poor (light green) Partial (medium green) Good (dark green)	Grants were provided to local organizations through intermediaries, however more than 25% of donor funding was used for the intermediary’s overhead costs.
 D3 Nature of partnership	None (white) Poor (light green) Partial (medium green) Good (dark green)	Grantees appreciated the trust-based, feminist partnerships they enjoyed with the intermediary.
 D4 Project design	None (white) Poor (light green) Partial (medium green) Good (dark green)	The intermediary did not impose thematic priorities on its grantees.
 D5 Project management	None (white) Poor (light green) Partial (medium green) Good (dark green)	The intermediary did not impose activities on their grantees, effectively transferring power for day-to-day programming decisions.
 D6 Project governance	None (white) Poor (light green) Partial (medium green) Good (dark green)	Decision-making was left to grantees and governance structures were not imposed on them.
 D7 Monitoring, evaluation and learning (MEL)	None (white) Poor (light green) Partial (medium green) Good (dark green)	Flexible reporting approaches reduced the burden on grantees, however there was only moderate value for other local actors.
 D8 Relevance of capacity strengthening support	None (white) Poor (light green) Partial (medium green) Good (dark green)	The intermediary’s capacity strengthening approach was standardized and minimally grounded in a recognition of local organizations’ existing capacity.
 D9 Administrative capacity and requirements	None (white) Poor (light green) Partial (medium green) Good (dark green)	The intermediary adopted a simplified application process, as well as reporting and due diligence approaches to minimize the burden on applicants and grantees.

Tips for applying the Localization Analysis Framework

The following tips may be helpful to consider when planning to use the localization analysis framework:

Tip #1 Clearly define the purpose of the analysis:

The purpose of the analysis will dictate how each dimension will be measured and weighted when drawing conclusions. While previously defined indicators and associated targets may be required for an accountability exercise, this may not be the case for learning and exploration, which would allow for more flexibility and innovation in applying the framework.

Tip #2 Clearly define the key terms and unit of analysis:

Defining the key terms and the unit of analysis used in the framework before embarking on the analysis is essential to support a rigorous, accurate and objective assessment. For example, terms like “project”, “program” and “partner” are often used differently by different donors/organizations and may not be clearly understood by the intended audience.

Tip #3 Understand the trade-offs for locally led development:

The framework includes 9 dimensions, however an assessment of “good alignment” across all 9 is not necessarily required for a “successful” locally led development initiative. There are noteworthy trade-offs, including the degree of direct versus indirect funding (measured through dimensions 1 and 2). For example, direct funding in the absence of intermediaries would ensure that a larger percentage of program funds end up with local organizations. However, the risks involved and the required capacity for the donor should be considered as well as the potentially cumbersome administrative requirements for funded local organizations. Funding directed through an intermediary can alleviate risk and the pressures on donor resources, as well as limit the burden of administrative requirements on local organizations.

Tip #4 Ensure data quality and relevance

Not all dimensions may be measurable depending on the unit of analysis chosen, the point in the program cycle when the assessment is taking place and the quality and relevance of project monitoring and performance data that is available. While it is advisable to design data collection methods that directly reflect the 9 dimensions, post-hoc analysis which leverages data that is already available is also possible. However, before embarking on a post-hoc analysis, it is essential to review the relevance and quality of available data and adjust the dimensions in the framework accordingly to ensure the value of the assessment is maximized for its intended purpose and audience. Ideally, multiple methods and sources of evidence would be leveraged to assess an intervention’s alignment with each dimension of the framework (e.g. document review, interviews, focus group discussions and surveys).

Invitation to Engage with US!

Reach out to us! Engagements to improve the framework are welcome and ongoing.

We are still conducting consultations to continue improving this framework and are especially interested to hear from civil society organizations as well as those that are conducting research or evaluation work on locally led development programming.

For questions or feedback on the framework please reach out to the Evaluation team! evaluation@international.gc.ca



Sources

The localization analysis framework was informed and inspired by a thorough review of the existing body of literature focusing on defining, understanding and measuring locally led development. Global Affairs Canada recognizes and greatly appreciates the contribution that the following sources made to the design of this framework:

- ◆ Global Mentoring Initiative (GMI). “Dimensions of Localization.” June 10, 2020.
- ◆ Kenya Community Development Foundation (KCDF). “ICSO-Donor Dialogue: Rethinking the Power Dynamics in Risk & Compliance Management.” January 25, 2023.
- ◆ Network for Empowered Aid Response (NEAR). “Localisation Performance Measurement Framework.” March 2019.
- ◆ Baguios, A., King, M., Martins, A., and Pinnington, R. “Are We There Yet? Localisation as the Journey Towards Locally Led Practice: Models, Approaches, and Challenges.” 2021.
- ◆ Rao, Julia. “Canadian International Development Organizations’ Engagement with Localization.” January 2023.
- ◆ USAID. “Local Capacity Strengthening Policy.” 2022.
- ◆ USAID. “Donor Statement on Supporting Locally Led Development.” December 13, 2022.
- ◆ World Resources Institute, Global Commission on Adaptation. “Reshaping Monitoring, Evaluation, and Learning for Locally Led Adaptation.” January 2021.
- ◆ Wessel, Margit V., Kontinen, Tiina, and Bawole, Justice N. “Reimagining Civil Society Collaborations in Development.” Routledge Taylor and Francis Group, 2023.
- ◆ Audet, François. “La Localisation de l’Aide Humanitaire: Un Chantier de Recherche en Pleine Émergence.” *Canadian Journal of Development Studies / Revue canadienne d’études du développement*, 43(4), 459-467, 2022.
- ◆ Beaulieu, Janyck, Robitaille, Katherine, Laganière-Bolduc, Rosalie, Farley, Sara, and Ladry, Naomie-Jade. “Lunettes Féministes Intersectionnelles pour Envisager une Localisation de l’Aide Inclusive et Sensible au Genre.” *Canadian Journal of Development Studies / Revue canadienne d’études du développement*, 43(4), 530-549, 2022.
- ◆ Global Affairs Canada’s International Assistance Policy Coordination Division. “Global Affairs Canada Localization Working Group Terms of Reference.” 2022.
- ◆ Global Affairs Canada Localization Working Group. “Localization Working Group Written and Verbal Feedback on Two Pilot Versions of the Localization Analysis Framework.” 2023.

In addition, the framework was piloted on the following 3 GAC programs with a focus on supporting local organizations. If interested, here is a link to their respective evaluation reports:

- ◆ [Canada Fund for Local Initiatives \(CFLI\)](#)
- ◆ [Women’s Voice and Leadership Program \(WVL\)](#)
- ◆ Partnership for Gender Equality (PGE) [forthcoming]