

Center for Disaster Philanthropy

The when, where and how of informed disaster giving

Strengthening Local Humanitarian Leadership

March 4-5, 2019

Seattle, WA

Hosted by Bill & Melinda Gates Foundation

Facilitated by Center for Disaster Philanthropy

Background

Following on a meeting in 2018 of nine U.S.-based philanthropic organizations, the Bill & Melinda Gates Foundation hosted a second meeting in 2019 to gather the original participants and several new partners. During the intervening months, a smaller subset of foundation representatives had met regularly to design the meeting and to accomplish the completion and scheduled launch of the Strengthening Local Humanitarian Leadership Philanthropic Toolkit.

The goals of the second convening were:

- To learn more about the challenges and opportunities in supporting local humanitarian leaders
- To consider collective action for U.S.-based philanthropies in strengthening local humanitarian leaders

The foundations represented at the 2019 meeting in Seattle included:

- Bill & Melinda Gates Foundation (BMGF)
- Center for Disaster Philanthropy (CDP)
- UPS Foundation
- Margaret A. Cargill Philanthropies
- GlobalGiving
- Give2Asia
- Facebook
- Amazon
- Conrad N. Hilton Foundation
- Open Society Foundations
- Walmart Foundation
- Microsoft

Building on a desire to hear directly from local humanitarian leaders, INGOs working in the humanitarian space and government coordination entities (USAID and UNOCHA), the two-day meeting provided learning opportunities for the philanthropic organizations in attendance and time to develop plans for collaborative action. The report that follows summarizes the learning sessions and the planning session that concluded the meeting.

Meeting Report

1201 Connecticut Avenue NW, Suite 300 | Washington, DC 20036 | disasterphilanthropy.org

Monday, March 4

Welcome

During the welcome reception, Valerie Nkamgang Bemo- *Deputy Director, Emergency Response, Global Development* from Bill & Melinda Gates Foundation provided welcoming remarks. Representatives from CDP, Regine Webster- *Founding Director and Vice President*, and Kim Maphis Early- *Senior Associate* outlined the evening's events.

PDF versions of posters introducing each of the foundations are stored in the participant Dropbox folder, along with other meeting materials.

Leading and Doing the Work Local Actors Moderated Panel

The session began with a short film from IRIN, followed by the panel responding to questions.

Heba Aly, Director, IRIN, Geneva, Switzerland, Moderator

Degan Ali, Executive Director, ADESO, Nairobi, Kenya

Sisira Madurapperuma, Department Head, ADPC, Bangkok, Thailand

Zaira Catota, Regional Communications Officer, Regional Forum of Disaster Risk Management of Central America (CRGR), will have short film

Aly began the panel by introducing IRIN and giving participants a preview of an upcoming rebranding of the organization as "The New Humanitarian." IRIN remains committed to local leadership and their deep focus on humanitarian crisis around the globe and is attempting to reach a new audience that is emerging around a new definition of humanitarian. Following up from the prior year's convening, Aly outlined the consistent barriers encountered in localization, including lack of media attention and philanthropic disinterest in conflict (*full list included in presenter materials*). IRIN has focused on bringing reporting on the impact and experiences of leadership and humanitarian action as close to the ground as possible. Despite their efforts and others', Aly contends that there continues to be a lack of progress on the localization agenda, as well as persistent myths.

Aly highlighted several examples of IRIN reports that spotlighted local humanitarian efforts, including:

- coverage of local fishermen conducting rescue efforts in Kerala, India, following the worst flooding in that region in a century
- Venezuela's healthcare crises, in which a growing number of "micro-NGOs"- locally based, small actors- are responding to high volume requests in attempts to meet local needs.

Throughout the coverage IRIN conducts, Aly noted that the biggest impact pieces are those that bring visibility and focus to local aid workers and organizations as leaders within their fields. The Charter4Change promises to highlight and call out local actors, but this has not been promoted and commitment to this platform is varying. This has significant impact on the perception of local actors' capacity and their ability to perform in times of crises. In a challenge to this Aly presented coverage from Afghanistan following the deaths of four foreign aid workers. While larger INGOs in the area removed staff members from the region, local actors remained present and there were no questions as to their capacity or ability to respond. Aly finalized the presentation focusing on the challenges associated with localization as well as topics that need greater exploration.

In the panel discussion, each presenter was introduced, and a series of prompts led to a rich discussion on local humanitarian leadership.

Share an example of your work that gives an idea on what you do on the ground and what challenges you face:

D. Ali: There are many stories of frustration. Being a Somali returning from the diaspora, Ali has felt unwelcomed while surrounded by non-Somali white representatives doing in-country work. At a meeting in Geneva, Ali found a community of Black and Brown humanitarian leaders from around the globe with similar experiences.

Although local organizations take the initial risk and time to train up local aid workers, they aren't able to compete with pay scales from larger groups. This results in local actors being "poached" by organizations with larger budgets. Budget allowances for local NGOs – very limited dollars to fund staff salaries and low amounts of unrestricted funds—work against growth and self-sustainability. In many instances ADESO feels like a subcontractor for larger INGOs to complete on the ground efforts.

Maderapperuma: There is a fear that larger organizations will disappear if local actors are successful, and a perception that the local groups will be taking jobs from others currently doing similar work. Maderapperuma is leading a new collaboration called the Asian Preparedness Partnership. The perception of this group is that it will become a "new" humanitarian organization, however the intention is to be a network for current organizations to partner with and collaborate. There's a fear that the limited resources coming into the region are being hoarded or will be kept from local organizations. As an example, in Sri Lanka the civil society organizations in the same sector were not happy with the processes led by Asian Disaster Preparedness Center. Instead of resolving the conflict together, the complainant reached out to the funder to voice dissatisfaction with funding streams. It is Maderapperuma's contention that organizations must challenge the fear process or peers will be lost to the humanitarian system. There is a lot of work to be done.

What has changed since localization has become a priority?

D. Ali: The biggest change has been the discussion, and it's continued. Yet there's been no practical change. There's some headway in countries where pooled funds are going to local actors. This is not the purpose of funds. The majority of this money is to be channeled to local actors, but OCHA is the "owner." OCHA behaves as a monitor or guardian by funding organizations based on assessed risk. Most local organizations have not experienced systems transfer from larger INGOs, e.g., training in compliance, HR, or finance. There needs to be significant investments in unrestricted funding to allow for administrative growth to truly build out local organizations.

What was the process to develop capacity and convince donors to support this effort?

Catota: CRGR brings together over 120 organizations in Central America, working at the local, national and regional level. There was an identified need for a strategic plan for the region, including protocol for regional disaster response. There was also a need for consultants to help create a singular document to cover the region. It took a long time to convince funders to provide funding, and now the primary concern is the sustainability for the network. There are 25 million people in Central America living in poverty, and there is a need to provide different resources to them.

What's the role of local government, and is it recognized by those emphasizing the local agenda?

Maderapperuma: There's a perception that localization means solely non-profits, but that is not the case. For him, it means mobilizing implementers, funders, government, investors from the private sector, academia, journalistic promoters. Just working with the local non-profit may not be enough to shift the humanitarian system. As an example, Indonesia declared that it would not accept any international funding, and that only local dollars would be used to respond to disaster.

In Behar, a \$1M grant was established. In the old model, half of it would be spent providing resources to farmers. In the newer model, focus was on the agricultural system. \$15k was spent to enhance the existing model to connect farmers with other states, linking 4 million farmers and attracting additional local government funding. This ultimately spurred reinvestment and prioritization by local government.

D. Ali: This example is very powerful. Local humanitarian leaders are doing this work because although the government is the duty bearer, there are gaps in their work. In Sudan, the government has been depleted in capacity. In the past, although civil society has the resources and knowledge internally to address need, there has been a tendency to wait for the money, to wait on the funder. Governments are learning about the capacity of local NGOs, and countries are refusing external actors to enter during time of disaster.

It's not that local humanitarian leaders don't have the desire, but there are barriers. What are realistic tools or items that local actors can provide?

D. Ali: 20% of funding by 2020 going to local actors- that is the target set by ADESO, which later became 25%. Knowing that donors can't deal with 50 or more partners in each region, ADESO is targeting locally managed funds. ADESO is incubating the NEAR network, as a way to identify who is doing what work, and where. The goal is to create a "LinkedIn" type system for donors to identify who these actors are, combining a rating and focus. In addition, there is ongoing work to produce a single set of performance metrics to provide a due diligence assessment of local NGOs. As a collaborative, there is the advantage of direct linkage through a social accountability network that can gather feedback.

To what extent could a platform like this contribute to local funding efforts?

Maderapperuma: The Asian Preparedness Partnership (APP) is comprised of multiple levels of society within the local chapters -- government, civil society organizations, private sector representatives. These groups are brought together to collaborate and give direct feedback to one another with the intent to enhance the funding process. There are regional steering committees that establish an accountability system for all of these partners. There has to be an established system of vetting that would meet most of the donor requirements. Some groups may not be approved, but that gives them the opportunity to try again and build capacity in the meantime.

In your experience with the (Gates) Foundation, what made the funder relationship so successful and what can other funders learn from your experience that would help them to engage with you?

Catota: The foundation accompanied the network at multiple levels during the strategic planning. It was very important for the funder to participate in the meetings in our region as we developed the documentation and protocols. CRGR provides three levels of training, and research to support the impact of these efforts. The brochure CRGR developed outlines response times and has copies of sample agreements with universities and other groups. The Foundation was active in the consultation that led to the creation of the network.

Moderated Q&A

InterAction: How does the narrative around international giving need to be changed or altered to come away from the “cheapest” model available?

Catota: The funder relationship with the local actor would make a difference in their actions. With more experience and direct testimony from local actors they would be able to accomplish better direct funding.

D. Ali: There is a need to remove the visual barrier about local actors. The person donating in Ohio needs to know that there is a local actor in-country completing the work. It is not the role of the \$50 donation to build capacity, it should be to respond. Money is already being used for international response where there are antiterrorism fears, and corruption fears. There’s a sense of protection because you are giving through an intermediary, but you are still giving money to these countries.

Facebook: *How can we democratize giving? In what ways do we need to address the regulatory aspects around giving? Facebook has been able to support over \$1Billion in dollars within the US and is making a significant effort to add to localization.*

Maderapperuma: There are local mechanisms of collecting funds from individuals. There needs to be SOPs in place to make the process transparent. There is a disconnect between what the real needs are and how these fundraisers are managed or presented. Maybe there won’t be a global solution but there can be a funder specific solution.

D. Ali: We need to have contextual, national solutions. We need to develop national funds that are led by the community, contextually specific and regionally specific. There’s an assumption that the funds are coming from the North to the South, but there is a large desire for “South to South” giving. When Somalia had a famine, there was a group from Pakistan that didn’t know how to give money to the region. There is plenty of money in the Global South that could move funds across borders in times of need. Creation of a network of national funds that would be able to move money around regionally in a way that is compliant and would allow local organizations to grow would accomplish this.

Tuesday, March 5, 2019

Breakfast

Bemo began the morning by reviewing the Gates Emergency Response Team strategy. The key focus for BMGF remains saving lives. Overall, there have not been significant changes to the strategy for the team during this past year, but there have been some changes to language and to fund allocation. One example is the establishment of specific funds for refugee crises. Key learnings from the Rohingya crisis led to a reevaluation of how to consider other disaster responses as well. Bemo shared a developing framework within her team for capacity building and a growing theory of change. Within their framework, current projects occurring in region are reviewed for how additional dollars would be best applied in times of disaster. In addition to the defined strategy, the team is flexible in responding to disaster by evaluating if humanitarian need is great, even if it falls outside of the current focus areas.

Bemo expressed the need to address the systemic needs for empowering local actors. As an example, Bemo did not provide feedback on the developing strategy when working with CRGR in Central America,

to ensure that local leadership was taking ownership of the process. This strategy also led to more transparency from the local actor in what real needs were and allowed for a more relevant solution to be created. Building trust with grantees is essential for the Team's success.

Following Bemo's 2019 strategy update, Maphis Early shared the recently launched *Strengthening Local Humanitarian Leadership Philanthropic Toolkit*. This toolkit was a result of the work of the 2018 convening. CDP will house this resource as a part of their overall Disaster Philanthropy Playbook (<https://disasterplaybook.org/>). The Toolkit will be an evolving resource for philanthropies as well as those looking to begin work in disaster response. The Profiles Project, a narrative resource highlighting the voices of grantors and grantees working in the humanitarian sector, will be included in the Toolkit as a piece to be used internally for educating board or staff members, or externally for media requests and recruitment of other philanthropic organizations to support local humanitarian leadership.

Making it Work- INGO Moderated Panel

Sam Worthington, CEO, InterAction, Washington, DC-Moderator

Carlos Mejia, Director of Humanitarian Programs and Policy, OXFAM America, Boston, MA

Jennifer Poidatz, Vice President Humanitarian Response, Catholic Relief Services, Baltimore, MD

Worthington began the session by setting a common understanding of INGOs, either as a receiver of funds or as a donor. In a survey of InterAction members, over \$1Billion was reported as being spent in Africa, made possible by multiple small donations. Worthington contends that these INGOs are operating in the same capacity as large philanthropic organizations in these instances. The primary goal in localization is removing the middle institution, whether an INGO or a major funder as a pass-through, and encouraging donors to give directly to the local actors. While the rhetoric and interest has been to increase local funding, there has not been much movement in that direction. Worthington outlined several myths that need to be dispelled from funder conversations:

Myth 1: Local actors are not central to crisis response.

Myth 2: Localization is cheaper.

Myth 3: INGOs don't have the same local knowledge or connections.

Myth 4: Localization is the answer for every context.

Additionally, Worthington outlined challenges to the localization agenda:

- Localization has been built for natural disasters, but the majority of humanitarian crises occur in conflict zones and are slow-onset and protracted.
- Each context and country are unique and have differing abilities to respond with local actors.
- Risk transference is another challenge, when direct engagement risk is placed on the local actor and the intermediary assumes fiduciary risk.
- Rise in global terrorism has also hindered the localization agenda as donors must navigate working in conflict zones and must be sure that service organizations are not linked in any way to terrorist activities or investments.
- Local programs can also grow so as to outpace local organizations. As an example, Worthington described youth camps in Middle Eastern countries focused on early childhood education. While the initial funding was provided directly to local actors, the program grew significantly and is now managed by an intermediary.

Mejia began the panelists' discussion by sharing practices from OXFAM within the localization context. OXFAM colleagues are in-country representatives who face significant personal risk. This example represents the first signifier of localization --commitment. Secondly, the relationship with local actors is critical in receiving information about both needs and safety. Protection for the in-country teams was of utmost importance and would not have been possible without the local actors. OXFAM practices are documented and shared with each in-region team.

Mejia continued that there is a need to provide local actors the space and platform to speak on their own behalf. A similar need is to focus on the role of women within disaster response. Women have been critical in gaining access to and leading in crisis zones.

Mejia outlined the moral principles of local humanitarian response:

- While localization is not easy, it is possible, and it is needed.
- Localization ensures dignity for all.
- Localization does not remove the need for outside assistance, but the leadership and strategy design and implementation must remain local.
- Myths prevail about local actors being rife with corruption and lacking capacity. These are myths.
- As partners with local actors, the priorities should be sharing resources and lifting up the local actors as experts. Local actors cannot remain invisible.
- Overall, localization is about changing the model to prevent the continuation of current practices in philanthropy.

In closing remarks, Mejia emphasized a common question throughout the convening. How has the conversation about localization changed? What practices have changed? What are we missing? The language and tone regarding localization has thus far not been helpful in challenging the current structures that disempower local actors. Direct funding and resources are not the only needs within humanitarian response. Human dignity has been removed from the dialogue and is ignored too frequently within this field. The current system and practices have led to this, and this system and these practices need to be replaced.

Poidatz picked up the conversation with the question "What is our end game?" Overall, the goal is to have better responses, working collectively, scaling responses, and better meeting the needs of those experiencing crisis. CRS operates with decision-making closest to the disaster. Poidatz highlighted the internal practice of accompaniment with grantees. It is an elevated form of partnership that reaches above the project level over multiple years and is focused on expressed needs from the local actor, not perceived needs from the CRS perspective. Where implemented, a CRS staff member mentors and partners with the local actors through the entire process. These practices encourage local actors to work more directly with one another rather than turning to an outside intermediary. There is significant value in building informal networks among local actors. This is not, however, a cookie-cutter approach, and cannot be given the various contexts in which the work is accomplished. While CRS may become a smaller player by operating in this way, the overall mission of CRS is being met. Poidatz ended her remarks with a short video highlighting humanitarian work in Lebanon.

Moderated Q&A

Worthington: In evaluating our internal systems, a culture has emerged where a “signature” is required for monetary requests. This is an example of a power mechanism in place for controlling money. How can we change this mindset?

Mejia: We have a small group of eight INGOs that come together for two days without taking notes to address difficult questions. This year it was hosted by OXFAM. It helps us to recognize that we have become so busy that we are not addressing changes that need to happen, and that we operate on assumptions. These conversations remind us to not be complicit in creating our policies and practices and challenges us to avoid always leaning on our own knowledge. Otherwise we won’t get there. It is a practice of listening and proximity.

Poidatz: We spend a lot of time with our partners teaching and encouraging them to say “no.” It is very hard for local organizations to say “no” because they fear that there won’t be another offer, or there will be a break in the relationship. We remind our partners that we will still be here even with a “no.” We know we have made a mistake when CRS is not invited back into a community. Not every person has the skillset required to engage with local actors and this is a focus for us in our internal training.

UPS: Thinking about methodology for disaster response, are local actors knowledgeable or trained in who can provide specialized response?

Mejia: It depends on the country. There are some countries that have an established system and knowledgeable staff. That’s because the local actors have been empowered or have demanded their own place in decision making spaces. There are some places that are very closed, and do not allow local actors in. Sadly, in this case, you lose the capacity in the region.

Poidatz: A positive sign is that local governments are stepping up and declining international aid. Our question is how can we accompany those decisions? The critical focus should be on building and supporting existing structures, not attempting to build parallel infrastructures. We want to uplift what exists.

Facebook: We see an emerging group online called the connectors. These groups mobilize themselves and are connecting with the needs of people on the ground. How can we connect these local connectors with NGOs? To add to that, how do we share these narratives with others and provide evidence that this works? How do we engage communications and public relations operatives in NGOs?

Poidatz: We would love any opportunity to have our partners connected and able to tell their own story and share their own work on a large platform. We have to name the names of local actors. We also need to know who the connectors are locally. How can we ensure that people who want to connect can do it easily while ensuring any mapping that is done remains inclusive?

Mejia: In practice, the people in the countries where we work use technology to connect. These are typically close communities and organizations. We can use technology as a tool to build proximity. But you can not become a local by building proximity. An external partner can only be “so close” to local issues.

Worthington: Connecting is power and gives us the ability to save more lives. Our challenge is connecting that energy to formal and informal actors locally. We’ve done geo-mapping of our efforts

around the globe, but this misses the connectivity of people. When these organizations are doing their job correctly, it's about connecting to solutions.

Bridging the Gap- Government Panel

Regine Webster, Vice President, Center for Disaster Philanthropy

Karen Smith, Business Partnership Advisor, Private Sector Section, UN Office for the Coordination of Humanitarian Affairs

Doug Stropes, Deputy Division Director, Humanitarian Policy and Global Engagement Division, USAID

Stropes began the conversation by describing USAID's internal shift from "public private partnerships" to "private sector engagement." This shift is a direct result of the private sector utilizing disaster response as opportunities for branding. Following a hurricane in Central America in 1988, the "cash is best" messaging emerged and created the Center for International Disaster Information (cidi.org). Then donated goods became a disaster within a disaster. These items often arrive infested, unusable, and take resources away from other response activities. Donated goods can also be disruptive to local economies with the influx of "free" items.

Stropes was charged with increasing the private sector engagement process, but corporations pushed back on the "cash only" model as they focused on strategies in their social responsibility platforms. Corporate social responsibility has become a recruitment and retention measure for the private sector. Stropes then attempted to provide educational resources for corporations, but later realized that the private sector had moved on without USAID assistance by employing leading humanitarian experts in their foundations to manage disaster response strategy. Now, USAID is playing catch-up on how best to work with the private sector to leverage their resources and energy in times of crisis. Its job is to ensure that there is space and engagement with the private sector within the humanitarian system.

During the listening sessions USAID had with the private sector, it was clear that the sector wanted to be involved in creating solutions. This resulted in the Humanitarian Assistance Grand Challenge (<http://humanitariangrandchallenge.org/>), a partnership between USAID, UKAID, and the Netherlands governments. The challenge required that local actors be engaged in the solution, as well as having a natural connection to the private sector. A total of 23 projects were selected for seed funding, with over 600 proposals received from 86 countries and one-third of projects led by women.

Webster: Are there other ways that USAID is looking at strengthening local humanitarian capacity?

Stropes: USAID's role is not a direct line. It is extremely burdensome to become linked to the U.S. government programs, and it is a 2-year process. There are opportunities for training as well as a year-long mentorship program to build local leadership. The goal is to build capacity in any way possible without the direct infusion of cash.

Smith described her experience joining UNOCHA and engaging in briefings for the private sector, connecting local Chambers of Commerce with how the humanitarian sector works. There were over 200 participants in the first session, many CEOs and senior leaders. When the Ebola outbreak occurred a single coordination call grew to over 800 participants, but did not include local small and medium enterprises, local business networks, or local chambers of commerce. The business community voiced a need for a single way to communicate and reach OCHA, resulting in the launch of the Connecting

Business Initiative (CBI). Until the creation of local CBIs, the focus was on large international corporations and their actions in humanitarian response. Now the focus has shifted to small and medium enterprises and their impact, where we don't have as much evaluative impact data. Along with a foundation guide, OCHA has found that peer-to-peer education has critical to the success of private sector networks working in the humanitarian space.

Webster: What is OCHA doing to bolster in-country first responders?

Smith: OCHA has limited capacity to support local actors, but we are working with business networks to provide local resources. One example is in Papua New Guinea, where there is no local humanitarian group. The aid network requested assistance in connecting with the local business community. The biggest challenge in working with the private sector is OCHA itself. There is a language issue-- government and the private sector are both seeking the same results but are not able to listen well to one another.

Stropes: USAID has learned that field staff members aren't confident about what sorts of conversations that they are allowed to have with local actors. Training had to be updated to ensure that field staff were participating in early conversations with the local community and understanding that the conversation alone did not signify a funding commitment from the U.S. government. Cross-sector conversations are crucial to aid and development endeavors.

Webster: An example in the disaster space is the Waffle House Index. It is a partnership between FEMA and Waffle House to identify facility closures. This is then used as a variable to understand local conditions and to plan response efforts. It is a strong partnership between a government agency and a private sector business.

Stropes: It is extremely challenging for the U.S. government to undertake partnering with small, local actors. In support of the Grand Bargain, USAID is leading 2 of the 6 workstreams, participation revolution and localization. In the past USAID had not tracked dollars reaching local actors- a first step was to acknowledge that gap in the data. That has changed this fiscal year. The goal has shifted to how USAID can be a better partner with traditional and new organizations to build local capacity, rather than on how local actors can partner with the U.S. government.

Webster: What are your thoughts on coordination needs? In particular, how does this work or not work for local needs?

Smith: OCHA is making efforts to address the cluster model, and part of it has to do with building trust. There's also a mindset of "this is how it's has been done" that needs to be addressed internally, and to set the capacity expectations at a realistic level.

Stropes: USAID is putting tremendous pressure on UNOCHA- the C does stand for coordination. This is a great opportunity to collaborate and ensure that the right voices are in the room, without creating a new cluster. USAID is supporting OCHA as it is restructuring.

Facebook: In-kind donations are not always piles of trash. There are valuable in-kind offerings that can be real substitutes for items that would normally be paid for. How can these be better incorporated into the humanitarian ask? How can the value and credit for this accrue to the donating organizations?

Additionally, how can there be better communication in the humanitarian space on who is making what ask?

Smith: UNOCHA developed guides for organizations specifically on in-kind donations. The office receives offers every week for in-kind donations. The question is OCHA's internal capacity- would OCHA be a good partner for this donation? Can it be made sustainable? Is there an ability to manage the relationship and the donations over the long term, or can the investment increase? For example, an airline in Europe is rebranding and they want to donate 80,000 first class blankets. In terms of collaboration, there is still a debate on whether businesses should be included in clusters. Some clusters are inclusive, and others have a hard no. OCHA is working on a consistent message.

Stropes: The "cash is best" message is really for those church groups, smaller community organizations, canned good drives, etc. There are times when in-kind donations are exactly what is needed from the business community, but the business must ensure that there is a verified need and an implementing partner on the ground ready to perform. A great example is a response from Amazon following Hurricane Maria in Puerto Rico. Amazon was able to gather a list of items needed from the American Red Cross and set up an online donation site where individuals could purchase a single item, like a broom. Amazon was able to translate these to bulk orders, creating efficiencies and deliver pallets of needed items. This is what the sector is looking for in terms of innovation and in-kind donations.

ADPC: How are learnings or takeaways from other countries, such as Miramar or Cambodia, being brought to the U.S. government processes?

Stropes: USAID is challenged on how to scale up. Notes and practices from colleagues on the development side of centralized guidance and decentralized execution are collected. That field staff can be the voice in the field and make the necessary decisions while fulfilling the agency mission. There is still a struggle on how to get those lessons learned higher up, as well as between regions. Attempting to manage that from Washington, D.C. is challenging, and as networks and regions are more connected these types of lessons will be learned.

ADPC: Coordination work can sometimes be abused, and limits scaling. Is there any UN mechanism or process that would transformation this?

Smith: There are changes happening. There have been some tasking and actions have occurred and 800 procedures have been reviewed. If there are meetings or programs that the philanthropic or service sector wishes for UN to be engaged in, please reach out. Myanmar Network has a responsibility to reach out with the invitation as well.

Final Full Group Review

The record that follows represents feedback from presenters and participants on key learnings from the earlier portion of the convening.

"There is greater strength to approach the need for philanthropic engagement as a network versus as individual foundations. Use partnerships and group strength to create change."- Karen Smith

“The more groups can focus on funding gaps that would provide a unique opportunity to have significant impact, particularly for fragile states, the better. We aren’t operating where the needs are the greatest.”- Heba Aly

“It is important to promote and support local leadership and improve the coordination of Level 3 responses. The challenge is that it is just not happening. The mandates currently in place lead to staying with the usual suspects.” – Jennifer Poidatz

“Keep the conversation open in a way that mirrors this convening. Keep the difficult conversations going around shifting power.” – Carlos Mejia

“Pick a few countries outside of your comfort zone to see if you can advance localization in that specific context. These conversations are happening at all levels.” – Sam Worthington

“Just Act. Move on what fits within your scope.” – Teresa Crawford

“We are accumulating knowledge as staff members, but board members aren’t building the same knowledge. How can we cascade this information to others? We have to start elevating this conversation internally and move the spectrum from transactional to strategic.”—Mark Lindberg

“Our best practice has been to take one place, one context and prove feasibility of the plan. Success will bring others that want to be a part.” – Jim Coughlin

“As we look to enhance our practices at GlobalGiving, it is critical to be listening to peers. Frustrations come from deep knowledge and expertise. There is a shared understanding across sectors of the same issues, and it seems to be a solid starting point to lead to change.” – Alix Guerrier

“There is power in having these groups here together and this will impact how we approach localization and outcomes. It takes intentionality, and our challenge is to leave with a commitment to action within our means. We must identify mechanisms to share our learnings.”—Bob Ottenhoff

“Having sustainability at the local level is important, as well as innovation in terms of ideas. Open Society Foundations created a mayoral exchange featuring Puerto Rican Mayors and other mayors who have experienced natural disasters. We all must understand our unique value within this ecosystem.”—Kizito Byenkya

“It would be transformative to give 5 years of funding with the condition to create revenue generating practices, so as not to need funders. This will give the NGO a voice. The private sector can help to start up businesses and provide feasibility studies- social enterprises with real technical support attached.”- Degan Ali

Primary Take-Aways

These takeaways were captured throughout the session as key learnings and needs within the humanitarian space

- Bring gender into conversation
- Build staff capacity & stop poaching local leaders
- Kick fear to the door and explode myths

- Access national budgets
- Match funds and provide seed money
- Identify local organizations and map them
- Support informal networks
- Accompany local organizations through mentoring, listening
- Create new infrastructure for localization
- Manage risk and prevent offloading it onto others
- Grant multiyear, flexible funding that builds on unrestricted funds
- Award innovation and growth
- Attend to the role of technology, how it might increase connectivity
- Focus on coordination structures
- Provide translation services
- Pilot programs
- Track funds to LHL
- Track impact
- Provide program support costs and operational costs
- Care for humanitarian workers
- Include local small/medium enterprises within the discussion
- Share databases of local humanitarian leadership
- Re-unite humanitarian and development streams

Collective Action Planning

The convening’s purpose was to reach agreement on collective philanthropic action(s). Following the departure of the panelists, participants gathered to discuss the following questions:

1. *Based on ideas from the first meeting and the Working Group (shared site visits, presentations in philanthropic meetings, joint research project, joint pilot program) and what we have learned in this meeting, what are possible actions we can take that will incentivize philanthropic organizations (including our own) to work differently? To guide your thinking, consider models that seem to be working or geographies and contexts where there are opportunities for impact.*
2. *What are the opportunities and challenges of each?*
3. *Prioritize these ideas.*

Group	Report Out
Group 1	<ul style="list-style-type: none"> • Need for a common grant and common due diligence process <ul style="list-style-type: none"> ○ How to leverage existing platforms (i.e., TechSoup) for support? • Shared Key Performance Indicators for accountability • Shared funding platform • More engagement with local business associations
Group 2	<ul style="list-style-type: none"> • What is preventing money from going directly to local leaders? What is the perceived risk? • Ensure this group and local leaders are represented at convenings • How to use the Philanthropic Toolkit to advocate for localization; engaging the right audience • More joint pilot programs • Focus on risk mitigation or preparedness activities

	<ul style="list-style-type: none"> • Shared site visits • Continuing relationships outside of the convenings • How to address the trust deficit as a sector
Group 3	<ul style="list-style-type: none"> • Formalize this group as a network—create online meetings or other ways to share learnings and challenges • Focus on co-sharing and co-creation, rather than building parallel systems • Advocate and be a voice for local leadership in meetings • Use collective voice in philanthropy • Keep the space for this conversation going • Help folks already in the humanitarian space to scale up • Case study of Hurricane Maria • Joint proof of concept project • Challenge: Investment of resources to keep the network up and going <ul style="list-style-type: none"> ○ Create a name that is recognizable to those outside of network ○ Create a sense of belonging in the network ○ Test the appetite for a network
Group 4	<p>Barriers:</p> <ul style="list-style-type: none"> • Risk aversion- Partner with media to share success stories about local national work • Logistical barriers to grantmaking- Provide resources around more effective grantmaking in the ToolKit <p>Opportunities</p> <ul style="list-style-type: none"> • Collaborate on collective statements • Build incentive structures for scoring/incentivization around localization efforts • Invest more in research on why funding local and national groups is important

Based on these group report outs, the following potential actions were identified as priorities:

- Network for Local Humanitarian Support
- Common Organizational Evaluation Tool
- Stronger Ties to Business Community (e.g., linking local Chambers of Commerce)
- Common Platform to End Building Parallel Structures
- Joint Pilot Program
- Pooled Funds
- Research to Provide Evidence-Based Case for Supporting Localization
- Engage Media to Broadcast Positive Localization Initiatives
- Incentive Funders Who Prioritize Localization

On completion of this exercise, categories voted on by organizations as to their interest and scope, and three groups formed to discuss the top-ranked potential actions. These small groups were asked to identify action steps for each of the three action areas.



Group 1. Form a Network, Collaborate on Support for LHL Programs, Pooled Funds

- Q1 Activities
 - Set up communication platform using Slack or similar tool
 - Invite members
 - Identify who is missing and needs to be invited
 - Establish a vetting process
 - Define roles & responsibilities (will require money and time)
 - Merge with a public-facing platform and feedback mechanism
- Q2 Activities
 - Map members through a survey- of disaster response types, grantmaking, humanitarian partners, locations
 - Create shared calendars for events
- Q3 Activities
 - Consolidate survey results
 - Launch quarterly meetings (virtual)
 - Check-in monthly
- Q4 Activities
 - Co-investment in advocacy

Group 2. Strengthen Ties to Business Sector

- Publicize and engage CBI/US Chamber of Commerce Toolkit/Business and Human Rights Resource Centers
- Methodology- Include global brands to leverage across locations for self-sufficiency (e.g., UPS, Unilever)
 - Support local organizations in creating Continuity of Operations Plans (e.g., using the APP model)
 - Engage local disaster management officials or support their continuing professional development
 - Employee training for preparedness, mitigation and early response
 - Link with local, regional and national governments
- Brands will connect to Chambers of Commerce to reach out to other local businesses
- 1. Build network
- 2. Create pooled fund
- 3. Research
- 4. Activity

Group 3. Research and Storytelling

- Identify needs
 - Collectively define and identify what we are doing and inform donors
- Collect formal data
 - Gates- capacity building, learning and information, emergency relief
 - Use questions framed by Carlos Mejia and Dan Maxwell in earlier meeting as basis for research
 - Requires money for six-month research project
 - Create a pooled fund
- Collect informal qualitative data

- Develop case statements from the different organizations (in addition to those featured in the Profiles Project)

Resources and links

The New Humanitarian (formerly IRIN News)-- <https://www.thenewhumanitarian.org>

Disaster Philanthropy Playbook-- <https://disasterplaybook.org/>

Humanitarian Assistance Grand Challenge-- <http://humanitariangrandchallenge.org/>

Center for International Disaster Information-- cidi.org

Summary and Next Steps

The conversation that began in 2018 was enhanced by the presence of leaders of local and regional networks active in the humanitarian space, leaders of INGOs, and leaders from governmental humanitarian organizations. With the goal of moving toward collective action, three areas of interest emerged and preliminary ideas for how to make progress on these initiatives were surfaced and recorded.

Participants are encouraged to review this report upon receipt, and the Working Group will reconvene later in the spring to discuss the report and to consider a plan in support of continued progress toward the realization of the recommended plans. CDP will organize the call.

The ToolKit will launch publicly in early April, and foundation representatives will be contacted to share the launch information within their own networks.