

Global Health Partnerships: How Local and International Organizations Work Together in the Age of Localization

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I. Introduction

“Localization” in the global health assistance space has a number of definitions, but most focus on increasing agency for local actors in development efforts and changing attitudes on how to prioritize development assistance. A primary way that donors are operationalizing localization is by adjusting their procurement procedures and directly channeling more money to the people and organizations that are from places that will benefit from their investments.

Much analysis is focused on the development impact of localization. What is less clear is how traditional partnerships and power dynamics between local and international organizations are affected by localization, especially when international non-governmental organizations (INGOs) and local actors undertake less familiar leadership roles in implementation and business development efforts. Also less examined are the kinds of business development changes that will be required for localization of global health assistance to succeed. This piece explores these topics.

The data collection for this study involved interviews with staff from 22 INGOs, local NGOs, and donors. The interviews were selected based on connections to the authors and on recommendations from other interviewees. They took place during the summer of 2022, and highlighted challenges and opportunities around how local NGOs and INGOs – as well as their donors – work together now, and how they may need to rethink partnerships and business development to advance localization. Some key findings:

Local actors say they are frustrated at the progress of localization

Interviewees were broadly critical of the years of inattention and underinvestment by donors, which has created a system where many local NGOs are not yet ready to lead major donor programs and can rarely compete with INGOs in business development. Multiple local NGOs said they have been starved of overhead rates that would fund capacity growth (vs. 60 years of ample donor overhead support to INGOs), and are now woefully understaffed in business development and other core functions that would make them competitive. They also said that most of the current donor processes for competing awards are structured in ways that continue to favor INGOs, and still effectively block local NGOs from taking leadership roles at the proposal stage. In turn, some local NGOs – worried they are not yet ready to win without support – partner with INGOs to create workarounds on locally restricted procurements that can maintain INGO dominance and decision-making in partnerships, and reinforce inequities.

INGOs say they want localization to work, even as they struggle to remain viable, relevant, and funded

Multiple INGO staff talked about how they believed in the global development goal of “working ourselves out of a job.” They also acknowledged the disconnect and challenges reconciling their philosophical agreement with the tenets of localization, and the financial imperative to remain viable as a business. Multiple

interviewees spoke about the fact that they are still trying to find the intersection between localization, business development success, and organizational mission and continuity, and that this creates uncertainty about how their roles may change over the long term. Despite this uncertainty, most local NGO, INGO, and donor interviewees said they believe INGOs are still relevant and will remain so, even as their roles continue to evolve.

Given decades of asymmetrical donor support to INGOs, and the paucity of such support to local NGOs, there remains a sizable difference in certain capacities between the two groups – not just in business development, but also in finance and administration, compliance, risk mitigation, and monitoring and evaluation (M&E), among other areas. Acknowledging this capacity gap, donors, INGOs, and local NGOs agree on a need for INGOs to support local partners in improving their capacities. Multiple interviewees noted the importance of INGO contributions in the promotion of learning across countries and regions, and in taking on mission-driven work that can be politically or legally challenging in some countries (e.g., working with LGBTQ+ youth or intravenous drug users).

For now, INGOs still receive the majority of donor funding and lead most of the largest donor-funded projects. During what is likely to be a period of transition, both INGOs and local organizations acknowledge potential growing pains as they partner to reach public health outcomes. Bilateral governments are also still the largest donors within global health, though that gap is closing with large foundations and the private sector increasing their share of development assistance. As such, while we acknowledge the ever-increasing importance of private sector and foundation funding to the broader story of localization, we focused this examination on partnerships between INGOs and local organizations within the government donor space. What follows are additional details on these findings, as well as recommendations to bilateral donors, INGOs, and local NGOs on how to take actions that will drive the goals of localization. Quotes from interviewees are included in each section. Additional quotes from interviewees that shed further light and nuance on these topics can be found in the Annex.



II. Business Development and Partnering Challenges for Local NGOs

Local NGO Challenge #1: Overhead rates disadvantage local NGOs

The issue that elicited the most concern among local NGOs was the catch-22 dilemma: most local organizations are not viewed as having sufficient capacity to win and then manage large grants, and yet their overhead rates are held so artificially low by donors that they cannot invest to build that capacity. Because many local organizations have historically been contracted as sub-partners to large INGOs, donors did not prioritize investment in their core overhead functions like business development, executive leadership, financial controls, human resources, organizational leadership, program reporting and learning, and communications. Most local organizations that receive USAID funding are in fact limited to a standard 8-10% de minimis rate to recoup their overhead costs – an amount that does not allow for investing in growth and capacity strengthening, and that is substantially lower than the rates for INGOs, which often range between 25-35%.



“Historical costs are not a good indication of local NGOs’ true costs; historically they have never had big fundraising, communications/marketing, finance and compliance teams, and have relied on INGO partners as primes to take on these functions. If we now want local NGOs to compete for international awards as primes, then we as donors need to be willing to reassess their true costs and make investments in their core functions.” – Donor

“Ours isn’t a capacity issue, it’s a pricing issue. Local is not cheaper if the outcome is meant to be the same. In fact, “local” should have a premium.” – Local NGO

Potential solutions:

- DONORS: Raise the overhead rates for local NGOs.
- DONORS: Invest in building capacity of local NGOs across non-programmatic areas.
- DONORS: Require INGOs to build skills of local NGO partners (beyond technical skills) as part of all new grants and contracts.
- LOCAL NGOs: Work with trusted INGO partners to understand their true costs of critical capacities (business development, leadership, financial oversight, etc.), as well as how they staff these functions in order to meet donor requirements.

Local NGO Challenge #2: The deck is stacked against local NGOs that want to compete for funding

Interviewees said that years of donor support to INGOs have created an uneven playing field, and that local NGOs cannot hope to compete unless the system

changes. Obstacles that impede successful bids by local NGOs include resources to prepare for tenders in advance, capacity to meet onerous bidding requirements, and tenders that are so large and complex as to be out of reach for all but INGOs.

A) *Inadequate resources to prepare for tenders in advance.* One of the consequences of low, capped overheads is that local NGOs do not build and maintain business development skills, while INGOs have well-funded processes that invest time and resources to be ready for a solicitation well in advance of its release. Big INGOs often start working on procurements a year or more before they are issued, relying on decades of organizational know-how, human and financial resources, and strong institutional backing to gain the necessary intelligence about a procurement's likely content, so that they are ready to effectively respond to a solicitation with a 45-day turnaround. Conversely, local NGOs often cannot afford to start working on preparing a proposal until shortly before it is released, or even after it goes live.

Interviewees said that unless donors either help to make more resources available to support local NGOs' bidding efforts, or greatly change the donor procurement process so that it does not require such a massive upfront investment of resources, local NGOs will remain shut out of the process and unable to beat INGOs head-to-head. As one local NGO interviewee said, *"I don't know how they expect us to read their minds in 30 days with no money."*



"We don't have the resources and the skills to be able to do resource mobilization well. We don't have business units to support this. We had a volunteer for a while, but we cannot afford to pay a professional proposal writer \$500/day for three weeks." – Local NGO

Potential Solution:

- **DONORS:** Hold procurements open for far longer periods, such as six months instead of 45 days, and/or consistently post full, finalized scopes of work for months before a procurement officially goes live. This will allow bidders to wait to start working on an opportunity over a longer period of time. It would also give local actors enough time to figure out how to submit a proposal during the process, reducing their need to take on international "subs" to support their proposal development efforts under quick timelines.

B) *Insufficient capacity to complete onerous proposals.* Local NGOs said that while they historically did not receive overheads or other assistance to grow their business development capabilities, INGOs – especially the American ones – were heavily supported with funding, capacity building, and preferential access to the largest funders. They say that donors cannot expect to put local NGOs in the lead with the flip of a switch and see them succeed in business development, when the requirements to be able submit a bid, much less be competitive, are so onerous as to exclude all but INGOs.

And the gap between where many local organizations are now and where they would need to be to compete with INGOs is huge. INGOs have large teams of business development professionals, covered by their overheads and armed with endless experience of navigating complex proposal processes. Their benches are deep, processes are state-of-the-art, and relationships with donors strong. Local NGOs say they will need to bridge a skills gap that, over decades, has become insurmountable.

Potential Solutions:

- DONORS: Provide direct funding to support local organizations to participate in business development efforts – either by paying for the preparation of the proposals or for travel for co-creation, or by offering consultant support to guide actors through the process.
- DONORS: Expand the use of fixed amount awards or fixed-price contracts to ease the administrative burden of bidding on and implementing programs.
- DONORS: Offer more multi-stage competitions that use mechanisms like concept papers, co-creation, and mentoring relationships that simplify bidding processes and open the door for donors and local actors to work together to define goals and approaches.

C) Huge and complex tenders. The complexity of procurement processes is also a challenge. For example, the average USAID or UK's Foreign, Commonwealth & Development Office (FCDO) proposal includes more than 100 pages of content, and requires a large team with multidisciplinary skills to complete. For many local NGOs, submitting competitive bids for these opportunities without significant support is a nearly impossible task.

In addition, the size of many tenders makes them unrealistic for a local NGO to implement, even if it wins. Leading even a medium-sized program (around \$15 million) as a first-time prime can be a massive strain for local NGOs, which lack the necessary procurement, grants management, financial, and operational systems. However, to address this, donors would need to change the way they operate and break apart their large, existing programs into many new, smaller ones. They would also need to change the way they are structured to oversee this proliferation of smaller projects, and such a massive change requirement is a potential barrier to reform.



“Smaller-ticket opportunities would allow local organizations to get some experience and start building capacity to play prime roles instead of relying on INGO partners to do this for the next 10 years.” – Local NGO

Potential Solutions:

- DONORS: Several interviewees proposed that donors offer more, smaller opportunities (between \$2-5 million), which would allow local NGOs to foray into prime roles where the stakes and the scale would be more manageable.

- DONORS: Offer virtual bidders' conferences for every procurement, followed by question-and-answer periods that allow local actors to understand the requirements.

Local NGO Challenge #3: New partnership models with INGOs can be painful

To overcome the above barriers to entry, increasing numbers of local organizations partner as prime bidders on proposals with INGO "subs," when specific procurements are set aside for local NGOs. In these partnerships, the INGO invests its own overhead resources and business development experience to support their local NGO prime to win a bid.

While this kind of partnership seems promising, it is fraught with challenges on all sides. There is often confusion around what partners should expect from each other in this situation. In some conversations, local NGOs spoke about unpleasant memories from years of being "stuck" in poor sub relationships to INGOs, noting that their conception of being a prime is based on that experience. In cases, local NGOs said they were not pleased with the level of support they received from their INGO subs. In others, they were frustrated that the INGO took over the proposal process without transferring learning or business development skills to their prime.

Several interviewees also noted that the donor tactic of restricting procurements to local organizations as a means to promote localization often fails to achieve its goals when local actors remain beholden to INGOs to bid, as they continue to drive the process.



"What should INGOs bring to the table? Respect. You have to respect local capacities. It is about not being condescending and actually respecting the technical expertise that exists." – Local NGO

"There is experience and value that INGOs can bring, but they need to rethink their roles, reinvent themselves, and think about how they are going to change the lives of people in the global south. Maybe starting, for example, by strengthening the capacity of global south organizations." – Local NGO

Potential Solutions:

- LOCAL NGOs: Local NGOs should intensify efforts to form trusted partnerships with INGOs that share their values, bring needed skills that donors require for the short term, and commit to building the local NGO capacity across business areas in the long term. Treating these relationships as balanced partnerships will require a shared vision for how the local NGO as well as the INGO should evolve, and within an agreed upon time frame.

- LOCAL NGOs: Set expectations with your INGO sub up front on how the relationship will work and each party's roles. Who will lead, and what does "lead" mean – is it about making key decisions, or is it also about driving the process to submit the proposal?



III. Business Development and Partnering Challenges for INGOs

INGO Challenge #1: INGOs will need to redefine their role in global health

In the face of localization pressure from donors and advocates, many INGOs are working to reinvent themselves. Some are examining their business models for ways to move the locus of control away from their headquarters and to partners and affiliates in the countries where they work. Some are holding organization-wide conversations about how to work themselves out of jobs, but others are slower to make changes that will shrink their footprint, budgets, and profiles.

As for what role INGOs might play, interviewees noted the benefits of cross-learning that comes from a more multi-country or global perspective, where the INGO can help countries avoid reinventing the wheel through the sharing of effective practices. The provision of technical expertise was also described as an area where INGOs can continue to add value, as was the possibility of "back office" support and capacity building in areas like M&E and financial management. Interviewees also spoke of the unique ability and willingness of

INGOs to act in certain environments where local NGOs may face more obstacles, such as working with particular marginalized populations whose activities are criminalized, for example.



“There are a lot of opportunities for INGOs to lead in broad knowledge management, research, dissemination, convening, and bringing together as a global community what we know works for a specific issue or population – to be that clearing house.” – INGO

“[Localization] is forcing us to have a long overdue discussion internally, about working to put ourselves out of business. But what does that mean? Changing our relationships with partners in-country. Doing things we should have done a long time ago.” – INGO

Potential Solutions:

- INGOs: Propose to transfer skills – and leadership – over the course of new and existing projects, with adequate funding to support the local NGO’s evolution.
- DONORS: Build in requirements not just for local NGO participation in a project, but for INGOs to raise capacity and transfer skill and leadership over the course of the project.
- DONORS: Recognize that capacity strengthening does not happen overnight, and it takes intentional investment of time and resources. Be patient, but also push INGOs to elevate their methods and approaches.

INGO Challenge #2: New partnership models with local NGOs can also be painful

Just as local NGOs have struggled with the changing dynamics around partnering for business development purposes, INGOs have had mixed experiences in these new relationships as well. Several INGOs interviewed told of instances where their own business development teams prepared the bulk of a proposal for their local NGO prime at a huge financial loss to the INGO, but this significant investment was not appreciated by their local partners. Others commented on their frustrations with their local NGO prime, which did not handle the process smoothly.



“In the short term, the experience has been that there is a huge lift to help the local NGO prime win. We will put tons of resources into winning the bid. We might as well be the prime.” – INGO

“In terms of implementation or proposal development, we are in the back seat on these issues. Things might not be happening in the way we would do it or at the pace we would do it, and we still have to sit back and not take the lead, just try and provide guidance where we can. It’s about letting them define the way forward and we have to be there to support it and not do it all ourselves.” – INGO

Potential Solutions:

- INGOs: Understand that “shadow priming” is not priming with a different name. In some cases, it is doing the work that would be otherwise expected of a prime, but with the agency and final decision-making power of a sub. Think about how this dynamic fits with your mission-driven and financial goals, and align your expectations accordingly.
- INGOs: Set expectations with your local NGO prime up front on how the relationship will work and each party’s roles. Who will lead, and what does “lead” mean – is it about making key decisions, or is it also about driving the process to submit the proposal?



IV. What Can Donors Do?

Despite their best efforts to advance a localization agenda, most bilateral donors are constrained by their own processes and systems, as well as by their governing bodies (Congress, Parliament, Board, etc.). Many of the top-down ways they fund programs can therefore conflict with the stated goals of localization and maximizing local agency. Programs like the President’s Emergency Plan for AIDS Relief (PEPFAR) and the Presidential Malaria Initiative (PMI), though driven by good intentions and based on evolving science, dictate which results the donors want to see and specific activities they want implemented. While these initiatives should be celebrated for having helped to save millions of lives, critics

also argue that the result of this top-down model is actually to decrease agency of local governments as well as local NGOs.

Furthermore, as donors move to shift more funding to local partners, they will need to refine their procurement approaches. For example, better engaging local actors through multi-stage procurements with co-creation has promise, but the approach has not levelled the playing field for local bidders yet. Co-creation can require an extensive investment of time, money, and human resources, thus recreating many of the same financial challenges it was meant to solve.



“Internal mechanisms within donor agencies tend to be biased towards traditional mindsets of disbursing funding directly to INGOs, and this needs to change. There should be a lens that looks at building the system around localization to support and accommodate additional local partners.” – Donor

Despite the structural challenges donors face in supporting localization, there are a number of areas that appear to be promising. Streamlined procurement processes, including those used by USAID’s New Partnerships Initiative (NPI), allow organizations to submit a short concept paper as the first hurdle, instead of requiring the submission of a full proposal from the outset. Organizations that pass that first round of competition are often invited to co-creation sessions with USAID and other stakeholders. Often only after that step is the assumed winner required to submit a full proposal, and they are supported through this process to adhere to USAID’s requirements. NPI has started to push other parts of USAID to use such streamlined procedures, though they still represent a small minority of opportunities.

For its part, MSD for Mothers builds the proposal development capacity of its prospective local bidders through training and coaching. All bidders for their programs receive intensive capacity building in proposal development, and some then had their programs funded. Such innovations are essential if donors want to not just open their markets to local bidders on paper but create the conditions that foster competition and allow many bidders to compete.

USAID and other donor efforts to reform their procurement processes seem perpetual. There have been some notable improvements in recent years, but there is still a long way to go for many donors’ processes to be practical for local entities. Based on our discussions, further areas for donors to explore include:

Solving the overhead issue. Donors must understand that the true costs of operations, delivering the results they expect, exceed an 8-10% overhead rate. Donors are more focused on results now than ever before, yet they have not examined the impact that low overhead rates have in inhibiting excellence. If localization is the path to improved and sustainable results, paying a high performing local organization an overhead rate that allows them to invest in their systems and processes is a good use of resources.

Revamping program portfolios. USAID, FCDO, and other large donors often rebid their project portfolios without reconceptualizing them significantly, and while maintaining them as huge, multi-faceted awards. If donors are serious about opening the door for more meaningful local partnerships, they need to examine their current portfolios of projects with an eye to breaking them into smaller pieces. Having more, smaller projects will:

- Reduce the burden of implementation, increasing the numbers of local organizations that are qualified to lead;
- Reduce the risk of any one project's failure to the donor's portfolio, increasing the willingness to work with local partners that are still developing their capacity; and
- Incentivize local NGOs to bid on projects they can win and successfully implement.

Incentivizing INGOs towards localization. When INGOs do lead, they need greater incentive to push for localization, and when they push for localization, they need to see their competitiveness increase. When donors made their largest concerted push for gender equity in programming in the early 2000s, they found the greatest success in changing INGO behavior not by mentioning gender in the scope of work, but by putting it in the evaluation criteria. Too many times, INGOs read about the goals of localization in a scope of work and propose creative and forward-thinking approaches that elevate local voices during implementation, only to be told after losing that their approach was too risky and could reduce results. Promoting localization needs to be its own separate evaluation criterion in procurement – the one weighted most heavily – and INGOs that champion it need to see their business development competitiveness increase.



V. Concluding Thoughts

At its core, localization is about local actors making their own decisions, in line with the concept of “nothing about us, without us.” With billions of dollars at stake each year – the localization agenda has been hyper focused on aspects of procurement procedures, funding flows, and other details. While alignment around localization’s goals feels relatively easy to achieve, gaining agreement on the rules of the road will be harder. If donors are serious about localization, they must address some of its biggest obstacles, and the nature of partnerships between local NGOs and INGOs must continue to evolve as both actors take on changing and unfamiliar roles in support of shared goals.

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Interviews included 27 current and former staff from:

1. African Society for Laboratory Medicine
2. Amref Health Africa
3. Aurum Institute
4. Bill & Melinda Gates Foundation
5. Children’s Investment Fund Foundation
6. Co-Impact
7. ELMA Philanthropies
8. Global Fund to Fight AIDS, Tuberculosis and Malaria
9. 360 Health Systems Diagnostics and Correction
10. IntraHealth International
11. Jhpiego
12. John Snow Inc.
13. Management Sciences for Health
14. MSD for Mothers
15. Population Services International
16. Tanzania Communication and Development Center
17. World Health Partners
18. USAID
19. Two additional INGOs*
20. One additional donor*

*These interviewees were not authorized to speak on behalf of their organization and requested that we do not include its name.

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Annex: Additional Quotes

Local NGOs

"This is exciting because of the resulting increase in sustainability and in-country ownership. There is a need to strengthen the ability of local organizations to carry on projects after donor funding ends." – Local NGO

"What's exciting is that localization is an opportunity where solutions are developed in Africa by Africans. We know our problems. We have our own ideas as to how to address them. But if we aren't at the table defining how to address them, we don't own the work." – Local NGO

"Money is power, and power lies with those who have the money. If the money can be moved into local hands, it moves the power structure in a different way." – Local NGO

"Smaller-ticket opportunities would allow local organizations to get some experience and start building capacity to play prime roles instead of relying on INGO partners to do this for the next 10 years." – Local NGO

"Negotiations between us and INGOs on bids used to be extremely top-down, when we were in a sub role. We were told 'this is what you are doing, we are not showing you the proposal, we are not showing you the budget, but please sign on because you are a local entity, and we will let you know if we win.' So, there is a conversation that needs to be happening between us and INGOs. Are you understanding that there is a shift? That we – the local entity – are now leading the conversation? How can you contribute; how can you make sure that together we are putting forward the best proposal for the communities we work with and work for?" – Local NGO

"We just did a big bid where we primed with a large INGO partner as our sub, and they didn't even help us with the proposal! They even sealed their budget and refused to let us see it before we submitted. When we were subs to them in the past, they never would have accepted this kind of behavior from us." – Local NGO

INGOs

"We could provide short-term technical assistance – come in and out to help solve strategic issues and very specific challenges... We might have positions in-country, but they wouldn't be really long-term ones. They would be targeted." – INGO

"In the private sector, there would have been mergers and acquisitions that would have disrupted and improved the market. In the INGO space, on the other hand, we can all get stuck trying to protect our market share and our place in the

system. There aren't many ways for that creative disruption in the system to occur. So, the localization conversation is a positive pressure, because it forces people to examine how they do things today, and whether they have innovated from five years ago. And now there are lots of things that local organizations can be doing that we used to do. That disruption is really positive." – INGO

"Either change the de minimis overhead rate or change the procurement requirements. Without letting organizations charge a real overhead that allows them to recoup the real costs of doing business, you are setting them up to fail." – INGO

"Traditionally, donors don't want to pay for lots of BD staff. And that is the biggest gap. If I had to cite one factor why we INGOs still get more funding than local NGOs, it's that the USG (the largest global health funder) has to do most of their spending through competed solicitations, and the rules are so complex – local NGOs just aren't set up to respond effectively." – INGO

"We have had some situations where we were a sub to a local partner and during a proposal process our role was clear and defined, but after the award, they didn't feel like they needed us anymore. And so, even though we spent significant time helping to develop the proposal and the project, we were left without a role." – INGO

"In one country, we were a prime for a period of time, then the role shifted mid-program, where we graduated two local NGOs to provide services to the government and to receive funding from USAID. But somehow accountability for performance still feels like it falls on us. We have lots of discussions about risk." – INGO

"There are a lot of opportunities for INGOs to lead in broad knowledge management, research, dissemination, convening, and bringing together as a global community what we know works for a specific issue or population – to be that clearing house." – INGO

"True localization means governments and local organizations really do set the priorities, and they are not trying respond to what FP2020, the Global Fund, and USAID want. PEPFAR is in that bucket – it's because it requires everything to be measurable and show value for money, etc., which are good goals. But imposing top-down things is backwards from localization." – INGO

Donors

"If we truly want to make aid inclusive, local voices need to be at the center of everything we do. We've got to tap into the knowledge of local communities, and their lived experiences. Otherwise, we risk reinforcing the systemic inequities that are already in place." – USAID Administrator Samantha Power

“Localization aligns with our philosophy, and not just in terms of a “nice to do.” Unless those that are on the ground buy into priorities, ownership afterwards becomes meaningless because it’s not their agenda.” – Donor

“Historical costs are not a good indication of local NGOs’ true costs; historically they have never had big fundraising, communications/marketing, finance and compliance teams, and have relied on INGO partners as primes to take on these functions. If we now want local NGOs to compete for international awards as primes, then we as donors need to be willing to reassess their true costs and make investments in their core functions.” – Donor

“There is a difference between ‘cost’ and an ‘investment’ – from a funder perspective. If you approach everything from a cost perspective, then you want to keep costs to a minimum. But if you think about it as an investment, you allow the ability to develop a resilient response over the arc required to create social change... As a Bridgespan report notes, you should ‘Pay the true cost.’” – Donor

“Internal mechanisms within donor agencies tend to be biased towards traditional mindsets of disbursing funding directly to INGOs, and this needs to change. There should be a lens that looks at building the system around localization to support and accommodate additional local partners.” – Donor

