ANNEX 1 – Localisation Commitments and Partnership Frameworks

1 - Adapting tools to partners types per status

Tdh has identified 5 types of partners for which adapted tools can be designed and followed. The below categories will analyze their specificities and the practices/tools that relate to their partnership management.

1.1. Governmental Institutions*

Definition**: All governmental or government-controlled entities that do not act as donor for Tdh. It excludes private companies, voluntary organizations, and households. The general definition of the governmental institution implies government ownership or control rather than mere function and thereby includes, for example, the exercise of public authority of the implementation of public policy. It includes public universities, public authorities providing support to the implementation of activities for a specific ministry or other state entity, such as Child Protection services for example.**

This category may include universities and research group (public or private). Similarly, Governmental Institutions may be understood as "local authorities". In certain countries, Tdh intervenes in collaboration with authorities that may differ from the central state authority.

Partnership Specifics:

Governmental Institutions are usually **highly formal and require a long-term cautious engagement** in-country. Tdh must be perceived as a useful resource and capacity-development provider to assist the government reach a long-term goal of providing services themselves. Prioritize the establishment of **good relationships with key employees at local and national level**. Involvement of local staff (rather than international staff) is key to build credible and culturally sensitive relations. Stressing your relations with local and national NGOs may also be helpful to your credibility, depending on the context.

When Partnering with Governmental Institutions, Tdh must:

Be aware of the wider environment of government and how this can impact the partnership. Tdh must ensure that Governmental Authorities are aware that it **complies with all local laws and regulations** (registration, licensing, programs, reporting…).

Align its objectives to already existing government strategic plans. If they do not exist, international standards and objectives must be used in coordination with the government.

In the case of Academic Institutions / Universities, Tdh must focus on the support to quality research (or joint research) with the institution providing its international and/or national knowledge and practical experience gathered through the years internally.

Tdh must position itself in line with its centers of expertise: Access to Justice, Child Protection, Migration, Maternal Health, and WASH. Tdh must focus on the quality of its partners' research and what use it will bring for both parties.

In the case of Academic Institutions / Universities, Tdh must **carefully consider the risks associated to outcomes of the research** it works on (for both Tdh and its academic partner). The risks can encompass different understandings related to ethics, "Do no Harm", Timeliness, advocacy etc…

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Tools to use*:

Tdh must focus on the use of **language appropriate tools** when dealing with Governmental Institutions:

Tools must all be adapted to the language used by the government.

Capacity Development opportunities carried out by Tdh and/or its partners must be made available to Governmental Institution workers in the same way as it is offered to other INGO or NNGO partners.

Enable and Favour Participation of Governmental Institutions to Humanitarian and Development working groups and coordination meetings partners that may exist (if not already led by governmental institutions). Such meetings are key to better understand National policies, keep ministry officials informed and up to date about Humanitarian and Development activities.

*It is to be noted that differentiated toolkits or tools may be developed depending on the context of intervention whether it is considered "Humanitarian" or "Development". LNA partners' tools may greatly differ depending on the context applied.

1.2. National Non-Governmental Organisations (NNGOs)1

Definition: **all non-state and non-market organizations in which people voluntarily organize themselves to pursue shared interest in the public domain in one given country. They represent a wide range of interests and ties and operate at national level. They are formal**.**

**What do we mean by "formal": the Local or National NGO is registered with the government and operates under its specific legal framework. The NGO is compliant with tax laws and is eligible to receive funding. It has a clear governance structure and a board of directors. It has developed policies and procedures to evaluate its activities.

Partnership Specifics:

NNGOs are **accountable to local laws and the communities where they are based**. They are led by local nationals and not internationally affiliated in terms of branding, governance, or financing (that results from affiliation). They are usually present in locations before, during and after a crisis. **NNGOs operate in the country in which they are headquartered**, **working in multiple subnational regions**. This category can include faith-based organizations.

Tdh must ensure that its NNGO partner's ethical standards are high and that it will not create reputational risk on the long term. Tdh must define red lines in the collaboration and monitor them, to be ready to end the collaboration if they are crossed. Anti-Criminal/Terrorist Screening will remain required before submitting joint proposal to donor where a partner is included for value of activities at or above 10'000 CHF.

Tools* to use:

Tdh must favor the use of local language in its relationship with NNGOs, if relevant. This is valid for communication, partnership follow-up tools, contracts and if possible, all documents involved in the collaboration

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[1] Although they are both included in the LNA definition, Tdh will consider National NGOs and Local CSOs as different entities in its localization policy to develop frameworks adapted to their specific needs.

with the partner. The tools may be bilingual (English + Local Language).

Partnership Strategy Document including objectives set at 3,5 and 10 years. The document must involve a fundraising plan that is co-designed (Tdh and NNGO partner). The document must state clear dialogue sessions throughout the partnership (who? when? how? why?) and dedicate time and funding for it.

Mutually Capacity Development Appraisal Tool that will define Capacity Development objectives for both Tdh and its partner. The Capacity Assessment Appraisal tool will ensure that risks and mitigation measures are clearly identified for both Tdh and its NNGO partner. This tool can follow the Due Diligence carried out by Tdh if the partner is new.

Partnership Management Toolkit in local language (if relevant). The Partnership Management toolkit will be provided by Tdh as a base but can be modified or co-designed. Toolkit may include some of the local partners' tools if deemed better or more contextualized by both Tdh and its partner.

Simplified Reporting and MEAL tools adapted to LCSOs.

Finance, logistics and HR rules adapted to NNGOs.

Access to LNA partner tailored trainings on the Tdh-designed Capacity Development Online Platform: Such as with Childhub (in local language, on topics requested by Local and National Partners).

Tdh Indirect Costs Guidelines for LNAs.

*It is to be noted that differentiated toolkits or tools may be developed depending on the context of intervention whether it is considered "Humanitarian" or "Development". LNA partners' tools may greatly differ depending on the context applied.

1.3. Local Civil Society Organisations (CSOs)2

Definition: **all non-state and non-market organizations in which people voluntarily organize themselves to pursue shared interest in the public domain in one given country. They represent a wide range of interests and ties and operate at local level. They can be formal** or informal***.**

** What do we mean by "formal": see above description under NNGOs*

*** What do we mean by "informal": the CSO operates without formal registration or legal recognition. It may function as a community-based, grassroots, or religious initiative but without a legal status. The structure lacks a clear governance structure and may operate on a volunteer basis or through flexible and decentralized practices. It usually has limited resources and can face legal funding challenges. Example: unregistered Syrian NGOs in Lebanon or Iraq, unregistered Refugee-led NGOs in Greece Refugee camps.*

Partnership Specifics:
LCSOs operate in a specific, geographically defined subnational area of an aid recipient country, without affiliation to an international organization. CSOs are accountable to local laws and the communities where they are based. They are led by local nationals and not internationally affiliated in terms of branding, governance, or financing (that results from affiliation). They are usually present in locations before, during and after a crisis.

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[2] Although they are both included in the LNA definition, Tdh will consider National NGOs and Local CSOs in its localization policy to develop frameworks adapted to their specific needs.

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Local language should be in all communications regarding the relationship with LCSOs, where and as feasible. This is required for communication, partnership follow-up tools, contracts and if possible, all documents involved in the collaboration with the partner.

Depending on context and financial availability, Tdh must either dedicate part of its finances in order to build capacity and increase the autonomy of a LCSO or deploy a variety of Capacity Development methods including mentoring and accompaniment. **Tdh must measure the partnership success on the increased capability and learning from activities undertaken by and with LCSOs.**

Although it can differ from country to country, LCSO tend to value Capacity development focused on in-person mentoring and accompaniment rather than formal training. Online trainings also work when combined with in-person training. It must focus on Organizational Development and capability to run Emergency or Development programs. Indirect costs funding should also be provided to LCSOs to help them capitalize on their progress towards a more formal and organized structure.

Tdh must ensure that its LCSO partner's ethical standards are high and that it will not create reputational risk on the long term. Tdh must define red lines in the collaboration and monitor them, to be ready to end the collaboration if they are crossed. Anti-Criminal/Terrorist Screening will remain required before submitting joint proposal to donor where a partner is included for value of activities at or above 10'000 CHF.

Tools* to use:

Tdh must favor the use of local language in its relationship with LCSOs, if relevant. This is valid for communication, partnership follow-up tools, contracts and if possible, all documents involved in the collaboration with the partner. The tools may be bilingual (English + Local Language).

Mutually Capacity Development Appraisal Tool that will define Capacity Development objectives for both Tdh and its LCSO partner. The Capacity Assessment Appraisal tool will ensure that risks and mitigation measures are clearly identified for both Tdh and its partner. This tool can follow the Due Diligence carried out by Tdh if the partner is new.

Partnership Management Toolkit in local language (if relevant). The Partnership Management toolkit will be provided by Tdh as a base but can be modified. It must be as adapted as possible to smaller structures such as LCSOs.

Access to LNA partner tailored trainings on the Tdh-designed Capacity Development Online Platform: Such as with Childhub (in local language, on topics requested by Local and National Partners).

Simplified Reporting and MEAL tools adapted to LCSOs.

Simplified Finance, logistics and HR rules adapted to LCSOs.

Simplified Budgetary tools specific to the management of Indirect costs funding for LNA partners' policy is provided to the LCSO.

*It is to be noted that differentiated toolkits or tools may be developed depending on the context of intervention whether it is considered "Humanitarian" or "Development". LNA partners' tools may greatly differ depending on the context applied.

1.4. International Organisations

Definition: **All non-state and non-market organizations in which people voluntarily organize themselves**

to pursue shared interest in the public domain in several countries. They represent primarily **International Non-Governmental Organisations.**

Partnership Specifics:

Tdh must prioritize partnerships with LNA partners as part of its Localisation policy. However, it shall not close any door to partnering with International Organisations.

INGOs are perhaps the kind of partners Tdh has the most knowledge of. They are formally recognized, usually aligned with its values and are subject to similar standards to Tdh. **Tdh must ensure that their reputation will not create a risk for its activities (whether at HQ level or on the field)**.

INGO partners must be prioritized if they can bring an added value to Tdh (technical or geographical advantage that Tdh does not have). Tdh must ensure that its partner's ethical standards are high and that it will not create reputational risk on the long term. Tdh must define red lines in the collaboration and monitor them, to be ready to end the collaboration if they are crossed.

Tools* to use:

Adapted Consortium or MoU contractual tools to INGO partners. Tdh must prioritize consortiums in which it can lead the contract (If it has the capacity to do so). This enables Tdh to retain contacts with donors and maintain good credibility. It will also contribute to enhancing its expertise on the management of partnerships at field, regional and global level, while nurturing its network.

Adapted Reporting and MEAL tools to INGOs.

Adapted Finance, Logistics and HR rules to INGOs.

Shared Communication plan to ensure Tdh's visibility in the INGO partners' circle.

Escalation process of allegations of misuse and abuse.

*It is to be noted that differentiated toolkits or tools may be developed depending on the context of intervention whether it is considered "Humanitarian" or "Development". LNA partners' tools may greatly differ depending on the context applied.

1.5. Private Sector Partners

Definition: **A for-profit organization that is not owned or controlled by the state/government nor is part of a civil society but is privately owned, such as private academic organization (e.g. private schools or private universities), private companies, private technical partners/engineering officers.**

The notion of Partnership with a private company can be complex as they sometimes entail a commercial relationship, which in this case is captured in a supply or service provision contract. This requires Tdh to apply Logistics procurement procedure.

Depending on how the partnership is maintained and the private partner status, the relationship can mean a donor compliance issue for Tdh (cost ineligibility), especially if the financial amount at stake is high.

How to differentiate between a private partner and a supplier?

	Supplier	Private Partner
Collaboration	Focused on the procurement of certain service or goods to meet specific needs. Transactional relation only (contractual). No joint governance.	Implication at all steps of project (from project design to evaluation). Shared goals, values, and efforts. Joint initiatives and shared responsibilities in the achievement of the project. Joint governance structure.
Risks	Risk sharing is pre-defined and reduced to the maximum for both Tdh and the supplier. Supplier only receives payment and does not contribute to finding resources.	Involves risk-sharing. Contributes to gathering resources. Shared challenges and successes.
Values	Limited shared values can be OK, however **Tdh Global code of conduct** and Policies, including PSEAH will still apply. Emphasis is on meeting specific needs /providing specific services. Transactional relationship.	Aligned values and ethical principles.

Partnership Specifics:

Private partners are primarily **targeted for their technical abilities in a project or the resources/network they can bring to Tdh**. Private partners may have stronger and more developed human, financial and knowledge resources in comparison to Tdh. Tdh must position itself as an Intermediary with a strong expertise on Access to Justice, Child Protection, Migration, Maternal Health and WASH. It should offer support in **building the private partners' capacity in on these topics but also on safeguarding, gender equality, inclusion, or other areas that Tdh is knowledgeable on**.

Tdh must work with Private Partners that can **provide innovation to its activities**, either at HQ or at field level, to pilot new ideas. Tdh must ensure that its Private Partners' ethical standards are high to **reduce the risk of doing harm** to partners, affected people or communities and that the private partner will not create **reputational risk** on the long term. Tdh must define red lines in the collaboration and monitor them, to be ready to end the collaboration if they are crossed. Anti-Criminal/Terrorist Screening will remain required before submitting joint proposal to donor where a private partner is included for value of activities at or above 10'000 CHF.

To decrease the ineligibility risks related to a potentially misunderstood partnership model, a contingency plan must be signed between Tdh and a private partner for the partner to provide guarantees that this partnership is shared and not limited to a short-term commercial relationship. **This document must clearly state the private partner must not be considered as a supplier in the sense understood in the Tdh Logistics procedure, but rather as a partner.**

Tdh values partnerships with Private Sector Operational partners to reinforce their paramount role for Local Markets.

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Specific due diligence adapted to Private Partners must be developed. Tdh must ensure that its potential private partner share its vision and values and does not create any sanction risks. Tdh must define mitigation measures for potential risks and mention it in the contract that is to be signed between both partie.

Partnership Contractual Checklist must be filled prior to signing a contract to ensure that the partnership does not create liabilities or loss of intellectual properties for Tdh. Contracts with private companies must be thoroughly reviewed. All contracts that will be signed with private partners must be in line with the Tdh upcoming data policy.

Partnership specific MoUs must be developed by Tdh to ensure all aspects of the partnerships with a private entity are foreseen. This tool can also remain a Service Contract depending on the expected relationship.

2 - Policy Monitoring - Enforcement procedure.

Measuring Progress

The below indicators are directly related to the Partnership and Localisation project operated under Somaha funding until June 2026. It complements that the main Policy Tracking Indicators defined in the main Localisation policy document (under the "Sum-up Point" page 16).

Topic	Indicators	Responsible Party
Funding	# of partners that received funding allocated by Tdh across delegations. % Indirect costs funding included in L/NA partners' funding agreements (contracts) (per partner)*	Partnership Project Manager and Field delegations.
Capacity Development	Number of people (per gender and function) that have used at least a Capacity Development Material (either downloaded the material or started an e-learning session). Number of learners who have completed at least one module of e-learning. % of satisfaction of Capacity Development platform reported for each Capacity Development Session:	Partnership Project Manager and Field delegations.
SDC Indicator	Number of local NGOs partners applying own strategies to promote equal gender relations & PSEAH in their organizations and in their relationships with their citizens / their beneficiaries –	TBD – project pilot countries for test in 2024

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A MEAL Plan including a monitoring plan and a tracking tool was validated by the project team to review the above-mentioned indicators. It involves the creation of new data collecting schemes, precises calculation methods, data sources and data collection frequency. Collected data will be analyzed on a yearly basis to estimate the progress made in carrying out the Partnership and Localisation Policy.

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