



## Advancing Locally Led Development

# Locally Led Development Learning Workshop Key Takeaways Report Manila, The Philippines

### Summary

On June 7, 2024, RTI International hosted its third Locally Led Development (LLD) Learning Workshop in Manila, the Philippines. Funded with RTI's own resources, these events help us to better understand the perspectives and priorities of local institutions and inform how we pivot our work to best support our partners and better [advance LLD](#). We take this commitment seriously; [RTI's dedication to LLD](#) represents a change in our business practices to put local institutions first so that they can lead and own their own development.

This report details key takeaways from the LLD workshop, with 23 individuals from 21 partner institutions (listed in Annex A) that represented both first-time and long-time RTI partners. Participants also represented a mix of subrecipients and grantees across a broad range of sectors, including education, energy, health, and the environment which provided diverse experiences and perspectives that enriched discussions. With seven projects in the Philippines, RTI is committed to investing in our local partnerships, connecting them with each other, and engaging them in cross-sectoral discussions.

### Our specific objectives of this workshop were to:

1

**Obtain recommendations from our local partners so that we can improve the partnership experience;**

2

**Discuss priority development topics to amplify and extend impact; and**

3

**Provide an opportunity for partners to network.**

# Top Five Key Takeaways on LLD in the Philippines

1

**Co-creation with local partners at the proposal and implementation stages is essential.**



We must more routinely engage local partners in this process and seek to include a diversity of local voices, particularly those that represent smaller organizations and marginalized groups.

2

**Clarity on partner roles and improved transparency and engagement on project decisions are key.**



Our local partners have their own partnerships to maintain and must understand why project decisions and shifts may be needed. They must also clearly understand their roles, what targets they are responsible for, and how their contributions overlap with other consortia partners.

3

**Onboarding of local partners and proper 'level-setting' at the outset of the project positions partners for success.**



Even if partners are not new, we should establish mutual expectations on policies, protocols, collaboration, and technical deliverables and targets with every partner through more robust onboarding.

4

**Increased capacity strengthening support for local partners (particularly newer partners) is desired.**



Strengthening capacity support for local partners is beneficial for helping them to perform, meet client and RTI expectations, and tap into transition awards.

5

**Engaging Local Government Units (LGUs) during project design and implementation is critical for sustaining impact.**



Cultivating champions at the outset of the project (consulting as opposed to informing them) is essential. To do so, we must understand their incentives and identify mutual points of interest.

## Co-Creation, Work Planning, and Implementation

Many individuals that participated in this discussion have partnered with RTI on multiple projects and/or have received multiple awards. Overall, there was a deep appreciation for RTI's partnership, level of autonomy we afford our partners, and respect for institutional expertise. Participants noted several areas for improvement and outlined general challenges that development work presents that can strain partnerships. Key recommendations were to:



- 1) Co-Create More Routinely with Local Partners and Include Greater Diversity**

Co-creation routinely happens with partners at the proposal stage, but partners expressed a desire for a greater diversity of local voices, particularly from smaller organizations. Grantees, specifically, are not typically involved in co-creation at the proposal stage because they are not identified until later in the project. Grantees (which are typically smaller and more likely to be community-based organizations (CBOs) that represent marginalized voices) offer diverse perspectives and context that may differ from some of the “bigger players.” Partners also desire greater co-creation during work planning so that they can be more active in formulating activities and targets, and more involved in planning discussions. This is particularly important as it relates to project sustainability and impact. Co-creation shifts greater power to local partners, taps their expertise, and provides an important foundation for building mutual trust and “partnership capital.”
- 2) Consider Compensating Local Partners During Proposal Co-Creation**

Many within the industry have called on international implementing partners (and USAID) to consider compensating local institutions for their time spent on co-creation. Local institutions bring invaluable expertise to help craft development solutions for their own countries. Workshop participants echoed this request and asked RTI to consider compensating them for their time spent on crafting technical designs in proposals. With fewer staffing and financial resources, this would help offset their costs and demonstrate value for their expertise.
- 3) Improve Transparency and Clarity of Communication**

The nature of development work is often stressful and fast-paced, with tight deadlines, ambitious targets, and frequent changes. When changes need to be made in a project, we should clearly communicate the reasons to partners. Lack of communication on the rationale can leave partners feeling frustrated, uninformed, and excluded from the decision-making process. Our local partners have their own partnerships to maintain and must be able to communicate pivots to them. Transparent, timely, and clear communication is key. RTI should be attentive in communicating with partners to inform them of implementation decisions and changes at both the proposal and implementation stages, even if we perceive that they will not be directly impacted.
- 4) More Consistent and Structured Onboarding and Mutual Agreement at the Outset is a Must**

It is critical for RTI and our partners to be on the same page about project goals, deadlines, deliverables, communication protocols, and rules and regulations at the project's outset. Partners expressed a desire for clearer communication and expectation-setting, and referenced the value of intentional onboarding sessions that could provide appropriate “level-setting.” Partners also referred to this as “building the plane before being asked to fly it.” Even existing partners expressed the value of onboarding to provide essential context and clarity for each project. They allow for mutual agreement and buy-in, rather than one-way communication.
- 5) Discuss the Big Picture and Strengthen Consortium Relationships**

Partners want to understand the big picture of the project and how they contribute to it. This requires understanding and articulating the value and expertise that each partner brings to the table and how they overlap and/or complement each other.
- 6) Involve Partners More in Monitoring, Evaluation, and Learning (MEL)**

Partners play an important role in contributing to project objectives, results, and targets. Accordingly, they must be more involved in MEL. This means involving local partners more heavily when it comes to proposing indicators and targets and discussing, specifically, how they contribute to them.

**7) Simplify and Clarify Budget Management and Work Plan Development Processes**

Some partners expressed a desire for simplified processes around how to manage and track budgets, as well as develop work plans, so they can better plan and contribute.

**8) Build Greater Capacity Strengthening Support for Local Partners into Projects**

Grantees, in particular, expressed a desire for capacity strengthening support around processes, protocols, USAID rules and regulations, budgeting, and financial management. They expressed that some aspects of the work were “too technical,” and that greater unpacking of terminology and content would be useful.

## Partnership Evolution

Because workshop participants represented a range of new and long-time RTI partners, we gained a variety of perspectives in how these relationships have evolved as well as how partners would like to see these partnerships further develop. Participants expressed a strong appreciation for RTI’s partnership and spoke positively about their collective experiences and “nurturing” and “harmonious” relationships with RTI, even throughout the COVID-19 pandemic crisis. They praised RTI’s continuous support and engagement, and the autonomy that we provide partners. During discussions, they offered the following considerations for improvement:



**1) Strong Partner Identification is Critical**

Participants noted that there needs to be purpose and intentionality in partner selection, and it should not be solely based on competitive strategy (i.e., what we think will be most competitive with the client, enabling us to win an award). The implication is that RTI should consider the “whole picture” of consortia members and their complementarity; assess and understand their technical skills and relationships more deeply; and also understand how our institutional cultures best sync with each other. These aspects are critical to consider as we form strong teams and strive to not only achieve project objectives, but also create transformational results.

**2) Improved Clarity on Partner Roles Leads to Stronger Performance and Partnerships**

In some cases, partners feel that their roles could be better clarified, along with how they relate to various RTI staff and other consortium members. Large consortia and staff sizes, or “too many cooks in the kitchen,” can create confusion. Improved scopes of work, explanations of partner roles (particularly vis-à-vis other consortia partners), and onboarding would all help to clarify partner roles and contribute to improved mutual expectations. Providing a clear focus and direction for local partners is vital to helping them succeed.

**3) Greater Thinking about the Evolution of Partner Roles**

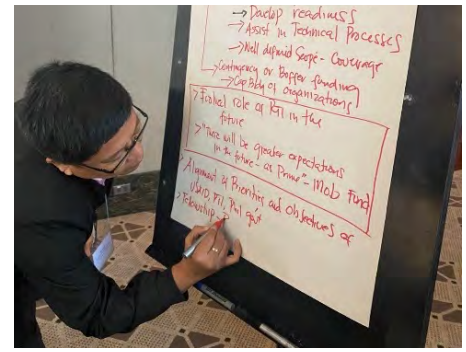
Partners also questioned whether we are “thinking enough about how to evaluate partnership roles over time.” Partners that progressed to play more significant roles over time (i.e., leading more substantial components, progressing from a grant to a sub, or assumed a key personnel position) expressed that this was essential for growing their relationship with RTI, and they appreciated the opportunities for growth and leadership. More intentionality in expanding partner roles (over the life of the project and beyond) is important for partners. It demonstrates our investment in them, shifts power to them in meaningful ways, and helps them better achieve their own goals.

**4) First-Time Partners Have Different Needs and May Desire/Warrant Greater Support**

First-time RTI partners often require more intensive support through onboarding, training, mentoring, and coaching throughout implementation. According to participants, navigating RTI and client processes and policies felt like “baptism by fire” and led to a feeling of “imposter syndrome.” RTI should have more intentional engagement with first-time partners on capacity strengthening needs (particularly at the proposal stage) and ensure we budget for adequate support.

## Transition Awards

Not all partners were familiar with USAID transition awards and their intent. While a few partners in attendance have managed USAID awards as primes, most were primarily subcontractors or grantees. After we explained the purpose of transition awards, participants offered some recommendations on how RTI may be able to best prepare them to receive and be competitive for them:



### 1) Emphasize Capacity Strengthening within Project Activities

A number of participants expressed the desire to better understand USAID processes, requirements, and culture. Bolstering this capacity (particularly at the proposal stage for transition awardees) takes time and intentionality that should be incorporated into all awards, where possible, meeting partners where they are. This support to partners should include providing information on understanding and navigating RTI and USAID expectations; visibility about USAID opportunities (like Local Works); and training, mentoring, and coaching on important areas, namely proposal development, financial management, formative research, and technical capacity. Proposal development was a key area mentioned by participants since it helps local institutions better tap into USAID and other donor funding and is often an obstacle to receiving an award. Capacity strengthening activities should directly support local institutions in passing USAID's Non-U.S. Organization Pre-Award Survey (NUPAS) assessment. RTI should, however, be careful about balancing capacity strengthening activities with technical activities and should “right-size” scopes of work with training, mentoring, and coaching (often in operational areas) to better support local partners to become a prime recipient.

### 2) Consider Progression of Roles to Create Expanded Leadership

Improving clarity on partner roles, as well as defining roles to include capacity strengthening and planning for progressively greater leadership (such as transitioning from a grantee to a subawardee), will help to better set partners up for long-term success.

### 3) Assign More Key Personnel Roles to Local Partners

Filling key personnel positions with staff from local partner organizations can be an important way to increase their direct experience with USAID and help bolster their leadership within project activities.

### 4) Prioritize Sustainability Planning

Participants view “transition” in terms of sustainability of project activities, not just becoming a direct recipient of USAID funding. They stressed the need to plan for project sustainability from award inception and ensure there is sufficient local buy-in and readiness.

## Supporting Local Government Units (LGUs)

LGUs are critical partners and stakeholders in the Philippines. Their presence and role (particularly through the newly issued Mandanas ruling) means that they are essential to sustaining project interventions.

### 1) Involve LGUs More at the Design Stage and Enhance Incentives for Participation

The buy-in of LGUs at the project design stage is vital; they cannot be merely consulted post-award. Participants cited that utilizing the “carrot, rather than the stick” to incentivize LGUs has been effective and should be continued. Incentives can include performance-based grants and scorecards. LGUs that meet scorecard benchmarks may be eligible for more funding. Participants cited scorecard examples related to energy and resilience.

### 2) Regularly Cultivate LGU Champions

Turnover within LGUs remains a challenge. To overcome this, project teams need to continuously work to cultivate and retain champions through regular advocacy—this includes technical champions in LGUs, not just decision-makers.

**3) Encourage Greater Civil Society Organization (CSO) and LGU Connectivity**

Local code already provides a mechanism for CSO participation. But while many CSOs are allowed active participation in local government, participants feel as though they often do not have a true say in decisions and are expected to comply rather than contribute. Stronger CSO participation can be extremely beneficial. RTI can and should serve as a better broker to help CSOs participate in meaningful ways. This may mean better connecting CSOs and LGUs so that there is strengthened mutual trust and credibility between them and demonstrate the value that CSOs provide. Better dissemination of CSO knowledge products may also boost credibility.

**4) Assess Opportunities to Boost LGU Capacities and Cross-Sectoral Collaboration**

The Mandanas Ruling provides an opportunity to assess capacity essential for successfully performing a variety of devolved functions. Understanding LGU capacity needs and priorities, and strengthening LGU capacity in a way that can support their ability to better provide these services, can add immense value to USAID-funded projects. Greater cross-sectoral collaboration between LGUs can also deepen impact.

## Cross-Sectoral Collaboration

RTI currently has seven projects within the Philippines, providing a unique opportunity to promote cross-sectoral collaboration. This can be challenging, however, when specific projects do not call for it and have no budget to support it. Partners offered the following recommendations to better implement cross-sectoral collaboration:



**1) Identify Multi-Sectoral Angles within the Proposal Process**

Identifying multi-sectoral angles at the proposal stage, while maintaining responsiveness to client demands, is key. RTI's presence in the Philippines allows us to more easily leverage existing USAID activities to add value in unique ways.

**2) Conduct a Country-Wide Mapping of RTI Partners and Create a Platform to Bring Them Together**

Participants recommended mapping RTI partners in the country and outlining their capabilities to share with partners. A platform for connecting them (such as a database) would allow partners to better network.

**3) Promote Sharing of Work Plans, Deliverables, and other Technical Products**

Sharing project work plans, deliverables, technical products, or best practices can deepen cross-sectoral learning and partner capacity.

## Inclusive Development

Participants discussed ways that RTI can deepen its inclusive development work and reach more vulnerable and marginalized populations in its programming. Participants divided into groups to discuss outreach to the following populations: 1) women; 2) youth; 3) persons with disabilities (PWDs); and 4) the LGBTQIA+ (lesbian, gay, bisexual, transgender, queer, intersex, asexual, and other) population. These groups were identified as the most relevant to RTI projects. Common recommendations for reaching all of these groups include:



1) Work directly with organizations that serve these populations and represent them during project design to ensure that we understand their unique challenges and needs (for populations in specific areas) and can appropriately tailor interventions that will best support them and their priorities.

2) Ensure that we do not increase stigma or discrimination of these groups.

3) Create better indicators to measure the success of interventions in reaching these groups.

Specific recommendations that participated cited for reaching each of the groups are as follows:

<p><b>Women</b></p>	<ol style="list-style-type: none"> <li>1) Consider financial literacy services and trainings to better empower women.</li> <li>2) Consider providing financial incentives to women for their participation, because women, particularly in rural areas, must also juggle household and caretaking duties.</li> <li>3) Conduct more meaningful gender analyses that are tailored to women in their specific communities.</li> </ol>
<p><b>Persons with Disabilities (PWDs)</b></p>	<ol style="list-style-type: none"> <li>1) Consider how to contribute to data collection and dissemination efforts (working with groups that already work with this population) to boost visibility and provide more targeted interventions.</li> <li>2) Early identification and screening are critical to optimally supporting this group, particularly in schools.</li> <li>3) Bolster skills for people and organizations to train on this topic, and socialize awareness about how to provide inclusive services and outreach to PWDs.</li> <li>4) Support the readiness of government to embrace PWD programs.</li> </ol>
<p><b>Youth</b></p>	<ol style="list-style-type: none"> <li>1) Consider expanding outreach (and resources) to youth in RTI's projects. Reaching them through focus group discussions or social listening sessions to understand their needs is critical.</li> <li>2) Engage youth as trainers and service providers. Peer-to-peer support and the creation of youth champions is very effective.</li> </ol>
<p><b>LGBTQIA+</b></p>	<ol style="list-style-type: none"> <li>1) Create safe and welcoming spaces to better reach this community.</li> <li>2) Support and strengthen LGBTQIA+ networks and professional groups through capacity strengthening.</li> <li>3) Cultivate champions within faith-based communities, uniformed personnel, and LGUs to help institutionalize and broaden support for the LGBTQIA+ community.</li> </ol>

## Conclusion

Our local partners in the Philippines are critical to our work. We are appreciative of the feedback and concrete recommendations that participants provided during the LLD Learning Workshop, as well as to their continued partnership and collaboration. These insights are helping to drive changes in how we work so that we can improve our implementation of LLD. For more information on our LLD work in the Philippines, please contact Ami Thakkar ([athakkar@rti.org](mailto:athakkar@rti.org)). For more information on RTI's work at-large, please contact Nicole Jacobs ([njacobs@rti.org](mailto:njacobs@rti.org)).

## Annex A

### List of Participant Organizations

- 1) Adventist Development and Relief Agency (ADRA) Foundation, Inc.
- 2) Association of Development Finance Institutions in Asia and the Pacific
- 3) DepEd Negros Occidental
- 4) Edukasyon, ph.
- 5) Forest Foundation of the Philippines
- 6) Full Advantage Philippines
- 7) Integrated Midwives Association of the Philippines (IMAP), Inc.
- 8) League of Provinces of the Philippines (LPP)
- 9) Mindanao Organization for Social and Economic Progress (MOSEP), Inc.
- 10) Philippine Business for Education (PBEEd)
- 11) Philippine League of Local Environment and Natural Resource Officers (Pllenro), Inc.
- 12) Philippine Society for Responsible Parenthood (PSRP), Inc.
- 13) Resources, Environment and Economics Center for Studies (REECS), Inc.
- 14) Save the Children Philippines (SCP), Inc.
- 15) Sorsogon Provincial Government
- 16) Tanggol Kalikasan
- 17) Team Dugong Bughaw (TDB), Inc.
- 18) The Family Planning Organization of the Philippines (FPOP), Inc.
- 19) Ugat ng Kalusugan (UNK), Inc.
- 20) Villgro Philippines
- 21) Wireless Access for Health, Inc. (WAH)

