



Below is the survey used for Social Impact's internal Localization Stocktaking. Some text has been edited so that it is relevant to other organizations.

Localization Stocktaking at [insert organization name]

Thank you for participating in our organization-wide stocktaking survey on localization.

This survey is intended to be taken individually by staff in project offices or the home office. Have you worked on localization? It doesn't matter! Still take this survey even if you haven't. Note that this survey is primarily focused on work with USAID. You can still take this survey if you haven't worked with USAID, but note that questions are geared towards USAID experience.

Depending on your experience with localization, the survey may take between 10 and 30 minutes to complete. Your participation is voluntary and you can stop the survey at any time. We greatly appreciate you taking the time to respond so that [organization's name] has a better understanding of our organization-wide localization experience. We will use this information to [organization's name] inform our internal localization efforts. It is also an opportunity for you to reflect on your localization experience.

At the end of the survey, we provide an option for you to provide your contact information. This is so that we can follow-up with you on your localization examples. We will not use your identification for any other purpose. We will also not attribute anything to you (if you identify yourself) without first asking permission.

If you don't feel comfortable identifying yourself, please don't do so in the survey. Your responses will be confidential unless you explicitly give permission to attribute your name.

For more on the localization initiative and key definitions, [insert organization's localization notes if available]. If you have any questions, contact [name localization points of contact].



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Part one: Perceptions about localization

For these questions, please reference this definition of localization: Localization is a power-shifting process. It shifts decision-making away from those on the outside of the development challenge looking in, to those that are most harmed by and responsible for addressing the challenge at the local level. Where there has been greater localization, local actors make decisions to: (1) set priorities; (2) design and implement; and (3) learn from and adapt development programming.

1. Presented as a matrix in the survey for ease as strongly agree, somewhat agree, somewhat disagree, strongly disagree.
 - a. I am interested in advancing localization efforts at [organization's name]
 - b. I am confident that localization can advance development effectiveness.
 - c. I am confident about my ability to advance localization.
 - d. I believe that my USAID counterparts are committed to localization.
 - e. I believe that my colleagues are committed to localization.
 - f. I am committed to promoting localization at [organization's name]
 - g. I am committed to adapting my approaches and behaviors to enable greater localization at [organization's name]
2. Please share any qualitative feedback to explain your responses above.



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Part two: Definition of and advocacy for localization

Here is our current working definition of localization: Localization is a power-shifting process. It shifts decision-making away from those on the outside of the development challenge looking in, to those that are most harmed by and responsible for addressing the challenge at the local level. Where there has been greater localization, local actors make decisions to: (1) set priorities; (2) design and implement; and (3) learn from and adapt development programming.

1. Based on your experience working with USAID, does this definition capture and summarize the meaning of “localization”? (Required)
 - . Yes. I recommend no edits to the definition.
 - a. Mostly accurate. I may suggest a few changes to the definition.
 - b. Mostly inaccurate. This definition needs a lot more work.
 - c. No, it’s inaccurate. This does not define nor summarize localization for USAID based on my experience.
 - d. Skip - no comment
2. What do you like about the definition? (open-ended -if answered 1a or 1b).
3. What concerns do you have about the definition? Do you feel that any important aspects of localization are missing from this definition? (open-ended - if answered 1b, c, d)



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Part three: Localization experiences

For the questions on this page, you will need to reference the localization spectrum. Please note that the spectrum is referring to local actors and USAID. Local actors are defined as individuals, organizations, and networks that originate from and are led by people within a given country or region, inclusive of government at national and sub-national levels.



- Based on this localization spectrum, where do you find the majority of your work with USAID? **(Required)**
 - Informing local actors
 - Consulting local actors
 - In partnership with local actors
 - Delegating power to local actors
 - Local leadership
 - I do not yet have localization experience
- Considering the spectrum and considering only USAID work experience with SI, what is the farthest to the right you have ever achieved in the localization spectrum? *Note: This question is about a single experience or project (even if a unique circumstance). This question is not necessarily meant to capture your typical experience. If you have multiple experiences, please respond about one “stand-out” or “champion” experience at the farthest right. You will have the opportunity to describe your additional experiences in follow-up questions.* **(Required)**
 - I do not have localization experience. (skip to page 5)
 - Informing local actors (skip to next page)
 - Consulting local actors (skip to next page)
 - In partnership with local actors (next question)
 - Delegating power to local actors (next question)
 - Local leadership (next question)



3. What specific service(s) were you primarily working on for USAID when you had this localization experience?
 - a. Evaluation
 - b. Other research
 - c. Monitoring
 - d. Capacity strengthening
 - e. Project or activity design
 - f. CDCS (country development cooperation strategy) development
 - g. Facilitation
 - h. Other - please specify
4. Where did this experience take place? Please list the country(ies) AND the city(ies), or community(ies).
5. Please provide a brief story of your experience. What was the effort? Who were the actors and what did they do? What happened? How did it go? What difference did it make to USAID's or local actors' work?
6. Please provide links to any final deliverables or resources (blogs, videos, etc.) related to this effort, particularly those that explain the localization angle to the story.
7. Do you have additional experiences that would qualify as "in partnership," "delegated power," or "local leadership"? Check all that apply.
 - a. In partnership
 - b. Delegated power
 - c. Local leadership
 - d. No additional experiences (skip to next page)
8. Please provide a brief story of your experience(s). What was the effort? Who were the actors and what did they do? What happened? How did it go? What difference did it make to USAID's or local actors' work? Please also label these experiences "in partnership" OR "delegated power" OR "local leadership" and provide the country AND city or community location. (See if the questions about the degree of localization and the location can be given as drop downs or separately so people don't forget.)
9. Please provide links to any final deliverables or any resources (blogs, videos, etc.) related to these efforts, particularly those that explain the localization angle to the stories.
10. In thinking about your localization experiences, please check all that apply to those experiences.
 - a. The scope of the work or the task was determined by local stakeholders or organizations
 - b. A local organization led the work / task
 - c. Local staff or consultants led the team carrying out the work / task
 - d. Local stakeholders made sense of the results and developed recommendations that they then took action on
 - e. Other [text response]





11. Considering your responses to question 10, what were the advantages of localization in these cases?
12. Considering your responses to question 10, what were the disadvantages of localization in these cases?



Part four: Enablers and Barriers to Localization

1. Consider an instance where you (or your team) were able to - with USAID - shift power to local actors. What enabled this? (open-ended)

Examples may include but not be limited to the following:

- a) USAID staff were committed to localization
- b) USAID and local actors had strong relationships
- c) [organization's name] had the right local staff or human resources to make it work
- d) There was a realistic timeline
- e) Local actors had sufficient capacity
- f) [organization's name] internal procedures
- g) Other - please specify

2. What barriers to localization do you face in your work with USAID? (open-ended)

Examples may include but not be limited to the following:

- a) restrictions around key personnel experience/education requirements.
- b) English language ability
- c) Urgency or lack of time to complete the task
- d) Etc.

3. What barriers to localization exist within [organization's name] procedures, processes, policies, and/or structures? (open-ended)



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Part five: Any additional feedback

1. Please share any lessons learned from your localization experience that you think your colleagues should know.
2. Please provide any additional feedback on localization or information, including publications or other online resources.



Part six: Respondent information

1. Are you based in a project office?
 - a. Yes (Go to question 3)
 - b. No (Go to question 2, skip questions 3, 4)

2. What division are you in?
 - a. **[add organization divisions]**

3. Which project office are you based in?
 - a. **[add project offices if relevant]**

4. Are you considered local staff in the project office (meaning you are from the country in which the office is providing services and you are hired under local labor regulations)?
 - a. Yes
 - b. No
 - c. I don't know

5. Are you willing to provide your contact information to discuss your localization experience?
 - a. Yes (go to the next question)
 - b. No (end survey)

6. Please provide your name or email so we can contact you.
 - a. _____

THANK YOU!

We greatly appreciate your time in taking this survey. We will share the results as soon as we complete the analysis.



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