Localization Measurement Within MOMENTUM

How Awards Are Measuring Localization and Contributing to USAID's Measurement Efforts

MOMENTUM Knowledge Accelerator

MOMENTUM Learning Exploration Summary Report | May 2024

Contents

SECTION 01

Background

USAID MOMENTUM

MOMENTUM is USAID's flagship suite of interconnected awards working to accelerate reductions in maternal, newborn, and child morbidity and mortality and improve equitable access to high-quality voluntary family planning and reproductive health care (MNCH/FP/RH). Each award is a partnership of local and international private and civil society organizations (CSOs) and other stakeholders, working alongside governments to improve health outcomes. Building on existing evidence and experience implementing global health programs and interventions, the suite helps foster new ideas, partnerships, and approaches, and strengthens the resiliency of health systems.

The suite currently includes six centrally managed global awards and their associated country awards, plus five Mission-led bilaterals.

Learning About How MOMENTUM Measures Localization

USAID and the MOMENTUM suite of awards participated in a two-part convening in July 2023 to discuss how the suite operationalizes localization across activities to improve MNCHN/FP/RH.

This report summarizes information shared during that convening that describes **how MOMENTUM measures localization**. MOMENTUM's experiences and lessons learned may inform how localization is measured and addressed across the project and beyond. This learning contributes to multiple learning topics, as outlined in the MOMENTUM learning agenda. Building and sustaining local capacity and ownership of development activities is fundamental to MOMENTUM's theory of change.

MOMENTUM's learning agenda complements award-specific learning agendas and is intended for use by the MOMENTUM awards to collaborate, learn, and adapt. Its objectives include capturing relevant, prioritized learning; contributing to filling critical knowledge gaps for MOMENTUM, USAID, and country and global stakeholders; and telling MOMENTUM's story.

Learning Area Addressed

What is MOMENTUM's legacy in supporting countries toward sustainable development?

Relevant Learning Topics

- What **capacity-strengthening** strategies are effective in increasing capacity at the individual, organization, community, and system levels?
- What strategies are MOMENTUM awards adopting to strengthen **country commitment**?
- Which **strategic partnerships** are important to foster and strengthen country progress toward sustainable development?

See the MOMENTUM Learning Agenda brief and *Localization Within MOMENTUM* for more information.

Specific Learning Questions and Methods

Learning Questions

This learning exploration examines the following questions:

1. How does MOMENTUM measure localization?

2. How well do MOMENTUM awards capture USAID's categories and good practices for local leadership?

3. What challenges do MOMENTUM awards see in measuring localization?

Methodology

- Information extracted from and synthesized on MOMENTUM measurement from July 2023 presentations.

  - **Note:** MOMENTUM Knowledge Accelerator's MEL plan is not included in this review as it does not engage with partners in countries.

- Review of USAID localization materials.

- Mapping and comparison of MOMENTUM measurement to USAID definitions and its October 2023 indicator guidance.

- Vetting of mapping and challenges identified with MOMENTUM awards.

How Can This Learning Be Used

- **MOMENTUM** can use the lessons from this exploration to sharpen their measurement activities and report against the USAID locally-led best practices indicator.

- **USAID** can use the emerging lessons to fine-tune their guidance to projects on measuring locally-led development.

- Other **implementation partners** can learn from MOMENTUM's experiences to shape their monitoring efforts.

How Does MOMENTUM Measure Localization?

USAID's Definition and Agenda for Localization

USAID defines localization as the set of internal reforms and actions undertaken by the Agency to ensure its programs are led by local actors or communities, are responsive to local communities, and strengthen local systems.

Localization involves a set of actions and behavior changes aimed at placing local actors at the forefront of development and humanitarian efforts.

USAID's localization agenda includes four key components:

1. Adapting policies and programs to foster locally led development.
2. Shifting power to local actors.
3. Channeling a larger portion of funds directly to local partners.
4. Serving as a global advocate and thought leader to catalyze shifts toward locally led development.

To carry out this set of actions, USAID has committed to directing a quarter of its funding to local partners by 2025 and ensuring that, by 2030, at least half of the Agency's programs place local actors to lead priority setting, activity design, implementation, and monitoring and evaluation.

For more information, see Localization at USAID: The Vision and Approach and Localization: Catalyzing and Supporting Local Change.

MOMENTUM Measurement Frameworks

The MOMENTUM MEL Framework

- MOMENTUM has an overarching monitoring, evaluation, and learning framework that:

  - Includes a set of indicators from which MOMENTUM awards can draw to inform their own MEL plans.

  - Captures how MOMENTUM efforts, through its theory of change, contribute to MOMENTUM's objectives and intended outcomes and impacts.

  - Includes **15 indicators** related to localization.

Award-Specific Frameworks

- Each MOMENTUM global award has a MEL framework tied to their own plans.

- The global awards' frameworks incorporate MOMENTUM MEL framework indicators as relevant and appropriate to their contexts.

- Some awards have developed additional indicators to monitor and inform their efforts, including localization.

MOMENTUM THEORY OF CHANGE

★ *Related to USAID's definition of localization.*

MOMENTUM's MEL framework was created to capture progress within its theory of change, which includes measuring its progress toward localization.

MOMENTUM ACTIONS AT ALL LEVELS

STRENGTHEN PUBLIC AND PRIVATE HEALTH SERVICE DELIVERY

- Introduce evidence-based approaches and interventions
- Strengthen service readiness to manage, deliver, and learn
- Improve quality of care delivered (incl. provider behaviors)
- Strengthen data use for improved system performance

ADDRESS SOCIAL FACTORS INFLUENCING HEALTH

- Listen/engage individuals, families, and communities (including youth)
- Take social norms into account in designing solutions
- Foster gender equality
- Promote dignity, respect, and equity in health care services

STRENGTHEN HEALTH RESILIENCE

- Build and strengthen strategic health and non-health partnerships, including private sector engagement
- Strengthen health systems to institutionalize best practices
- Foster iterative collaboration, learning, and adaptation

INTERMEDIATE OUTCOMES

Access, Use, and Coverage (Result 1)

- Increased availability of **evidence-based, quality MNCHN/FP/RH services**
- Improved **person-centered care,** including provider-client interactions
- Increased **demand for and utilization** of quality MNCHN/FP/RH services
- Improved **MNCHN/FP/RH practices** by individuals, families, and communities

National and Local Capacity (Result 2)

- **Strengthened engagement** of civil society, local institutions, and community-based and faith-based organizations
- Increased engagement of **local technical leadership** at global level
- Increased **national and subnational absorptive, adaptive, and transformative capacity**
- Increased **national and subnational commitment**
- **Increased national resources** for MNCHN/FP/RH service delivery
- Increased **individual, household, community-level resilience**

Multisectoral and Innovative Partnerships (Result 4)

- **Strengthened strategic, cross-sectional, and innovative partnerships** for MNCHN/FP/RH

RESULT 1

SCALED-UP AND SUSTAINED **ACCESS** TO AND **EQUITABLE USE** OF EVIDENCE-BASED, **QUALITY** MNCHN/FP/RH INFORMATION, SERVICES/CARE, AND INTERVENTIONS IN PUBLIC AND PRIVATE HEALTH SECTORS (INCREASED **EFFECTIVE COVERAGE**)

GOAL

REDUCTION IN MNC MORBIDITY AND MORTALITY

IMPROVED COLLABORATING, ITERATIVE LEARNING, AND ADAPTING, INCLUDING ENGAGEMENT OF PARTNERS IN GLOBAL TECHNICAL LEADERSHIP

Result 3

ACCELERATED COUNTRY PROGRESS TOWARD SUSTAINABLE DEVELOPMENT

BROADER FACTORS INFLUENCING ACTIONS AND SUCCESS

SHOCKS AND STRESSES | READINESS TO SUCCEED WITH USAID SUPPORT | GOVERNMENT AND STAKEHOLDER COMMITMENT | SOCIOCULTURAL AND ECONOMIC CONTEXTS

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The MOMENTUM MEL framework includes 15 quantitative and qualitative indicators related to localization.

Indicator	MOMENTUM MEL Framework Number
Number of entities receiving MOMENTUM support that introduce, strengthen, or contribute to institutionalizing adaptive learning	AL.1
Percent of targeted actors using data generated through their monitoring systems to modify activities or strategies (MOMENTUM pilot indicator)	AL.2
Examples of organization-level entities that modify programs to better reflect locally prevailing social norms, values, beliefs, and practices that influence health outcomes	CAP.1
Examples of system-level entities that modify programs to better reflect locally prevailing social norms, values, beliefs, and practices that influence health outcomes	CAP.2
Examples of health care workers who use client or other feedback to improve program reach, coverage, or effectiveness	CAP.3
Examples of community-based facilities that use client or other feedback to improve program reach, coverage, or effectiveness	CAP.4
Percent of organizations with improved performance	CAP.5
Percent of organizations with increased organizational and/or technical capacity	CAP.6
Number of service delivery points with a mechanism for communities to hold it accountable for the quality of health services	CE.1
Number of approaches implemented by MOMENTUM that engage the community	CE.2
Number of country representatives serving as active members of global technical consultations and leadership fora as a result of MCGL's efforts	GL.1
Number of USG engagements jointly undertaken with the private sector to achieve a U.S. foreign assistance objective	PSE 1
Number of partnerships formed or strengthened to address priority MNCH/FP/RH issues	PSE/MSP.1
Number of new solutions developed through partnerships to address problems prioritized by partnership members	PSE/MSP.2
Number of changes as a direct or indirect result of partnership intervention	PSE/MSP.3

Each MOMENTUM award captures localization with a combination of indicators from the MOMENTUM MEL framework supplemented by other indicators that capture award-specific strategies or focus.

MOMENTUM Country and Global Leadership

Indicators
Number of service delivery points with a mechanism for communities to hold it accountable for the quality of health services **(CE.1)**
Number of organizations with increased organizational performance **(CAP.5)**
Percent of organizations with increased organizational and/or technical capacity **(CAP.6)**
Number of new country representatives serving as active members of target global technical leadership fora **(GL.1)**
Number of partnerships formed or strengthened to address priority MNCH/FP/RH issues **(PSE/MSP.1)**
Number of co-created plans using human-centered design (HCD) principles
Number of health workers trained/mentored/coached to improve professional capacity
Number of countries with an Advocacy and Accountability Collaborative (TAAC) established
Number of new/revised policies/strategies to which award contributed
Number of local partners on track to meet award targets outlined in their fixed amount awards (FAAs)
Total funds mobilized (in-country) through partnerships to address priority MNCH/FP/RH issues*

Bolded indicators are specific to the award and not MOMENTUM-wide.
*Not a formal indicator but part of standard tracking and reporting.

MOMENTUM Private Healthcare Delivery

Indicators
Percent of targeted actors using data generated through their monitoring systems to modify activities or strategies **(AL.2)**
Percent of USG-assisted organizations with improved performance **(CAP.5/CBLD-9)**
Percent of organizations with increased organizational and/or technical capacity **(CAP.6)**
Number of approaches implemented by MPHD that engage the community **(CE.2)**
Number of country representatives serving as active members of global technical consultations and leadership fora as a result of MPHD's efforts **(GL.1)**
Number of USG engagements jointly undertaken with the private sector to achieve a U.S. foreign assistance objective **(PSE 1)**
Number of partnerships supported, facilitated, or catalyzed by MPHD **(PSE/MSP.1)**

MOMENTUM Integrated Health Resilience

Indicators
Number/Percent of MIHR-assisted organizations with improved performance **(CAP.5)**
Number/Percent of service delivery points (SDP) with a functioning mechanism in place for community members to hold the SDP accountable for the quality of health services among SDPs implementing accountability mechanisms with MIHR/USG support **(XM.CE.1)**
Number of partnerships supported, facilitated, or catalyzed by MIHR **(XM PSE/MSP.1)**
Number/Percent of communities supported by MIHR with improved Analysis of Resilience of Communities in Disaster (ARC-D) Health or standard community health resilience tool scores
Number/Percent of award-supported district health departments and communes that utilized data for planning and decision-making

Bolded indicators are specific to the award and not MOMENTUM-wide.

MOMENTUM Routine Immunization Transformation and Equity

Indicators
Number of entities receiving MOMENTUM support that introduce, strengthen, or contribute to institutionalizing adaptive learning **(AL.1)**
Percent of targeted actors using data generated through their monitoring systems to modify activities or strategies **(AL.2)**
Percent of organizations with increased organizational and/or technical capacity **(CAP.6)**
Number of approaches implemented by MOMENTUM that engage the community **(CE.2)**
Number of country representatives serving as active members of global technical consultations and leadership fora as a result of project efforts **(GL.1)**
Number of partnerships supported, facilitated, or catalyzed by MOMENTUM **(PSE/MSP.1)**
Number of new solutions developed through partnerships to address problems prioritized by partnership members **(PSE/MSP.2)**
Number of changes as a direct or indirect result of partnership intervention **(PSE/MSP.3)**

MOMENTUM Safe Surgery in Family Planning and Obstetrics

Indicators
Number of entities receiving MOMENTUM support that introduce, strengthen, or contribute to institutionalizing adaptive learning **(AL.1)**
Percent of USG-assisted organizations with improved performance **(CAP.5)**
Number of country representatives serving as active members of global technical consultations and leadership fora as a result of project efforts **(GL.1)**
Percent of relevant supported organizations with increased organizational and/or technical capacity[+]
Percent of providers trained in target surgical MH/FP services and related skills deemed competent at end of training
Number of trainers trained with MOMENTUM support in project focal areas and safe surgery principles
Number of practitioners trained by MOMENTUM trained master trainers
Amount of award funding to local partners via subawards, professional service agreements, and task orders*

Bolded indicators are specific to the award and not MOMENTUM-wide.
[+] Related to CAP.6
*Not a formal indicator but part of standard tracking and reporting.

USAID's Measurement of Localization

Overview of USAID's Good Practices for Local Leadership

USAID has identified **14 good practices** and **4 categories of good practices** to be used by either the Agency or its implementing partners to enable greater local leadership in USAID activities.

These good practices may occur during one or more of the following activity stages:

- Priority setting
- Design
- Implementation
- Monitoring and evaluation

Good Practices for Local Leadership

Categories of Good Practices	Good Practices for Local Leadership
Working Directly with Partners	• Partnering directly with local or regional partners
Creating Effective Local Partnerships	• Co-creating with local or regional partners • Making descriptive, not prescriptive awards to local and/or regional partners • Helping local and regional partners achieve full cost recovery
Recognizing, Leveraging, Strengthening Local Capacity	• Using demand driven capacity strengthening approaches • Advancing local and regional actors' readiness to work directly with USAID • Measuring programmatic success using locally defined measures • Making local subawards and subcontracts • Including the transition award process in prime assistance awards • Conducting evaluations with local experts
Engaging Communities Directly	• Conducting listening tours to inform activity design • Co-creating with stakeholders, including local communities • Institutionalizing feedback and accountability with local communities • Implementing participatory monitoring, evaluation and learning

Source: Introducing the Locally Led Programs Indicator on the Advancing Local Leadership in USAID Programs webpage

Some Good Practices Are Specific to USAID

Other practices are relevant to implementing partners

CATEGORIES OF GOOD PRACTICES	GOOD PRACTICES SPECIFIC TO USAID	GOOD PRACTICES APPLICABLE TO PARTNERS
Working Directly with Partners	• Partnering directly with local or regional partners	
Creating Effective Local Partnerships	• Co-creating with local and regional partners • Making descriptive, not prescriptive, awards to local and/or regional partners • Helping local and regional partners achieve full cost recovery	
Recognizing, Leveraging, and Strengthening Local Capacity	• Including the transition award process in prime assistance awards	• Using demand-driven, capacity-strengthening approaches • Advancing local and regional actors' readiness to work directly with USAID • Measuring programmatic success using locally defined measures • Making local subawards and contracts
Engaging Communities Directly	• Conducting listening tours to inform activity design	• Co-creating with stakeholders, including local communities • Institutionalizing feedback and accountability with local communities • Implementing participatory monitoring, evaluation, and learning • Conducting evaluations with local experts

How USAID Measures Localization

In October 2023, USAID introduced new measurement to drive progress toward localization goals. One such measurement is the **Locally Led Programs Indicator**.

Definition	The percentage of USAID-funded activities in which local partners and/or local communities lead development efforts, including priority setting, design, partnership formation, implementation, and defining and measuring results.
Operationalization	To count, **an activity must both**: • Be active at any point in the fiscal year of reporting. • Demonstrate **at least two (2) good practices in at least two (2) categories of good practices** for local leadership. This indicator is reported alongside the **Direct Local Funding indicator**.

Source: Introducing the Locally Led Programs Indicator

How Well Do MOMENTUM Awards Capture Categories and Good Practices for Local Leadership?

The MOMENTUM awards capture the two categories of USAID's good practices for local leadership relevant to partners.

Categories of Good Practices	MCGL	MIHR	MPHD	MRITE	MSSFPO
Working Directly with Partners		PRACTICES ARE SPECIFIC TO USAID			
Creating Effective Local Partnerships		PRACTICES ARE SPECIFIC TO USAID			
Recognizing, Leveraging, and Strengthening Local Capacity	✔	✔	✔	✔	✔
Engaging Communities Directly	✔	✔	✔	✔	✔

As described in USAID documents, many best practices are specific to USAID actions. However, MOMENTUM might be implementing practices relevant to the categories.

Some of the indicators from MOMENTUM'S MEL frameworks align with USAID's categories and good practices for local leadership.

Practice Categories	Related MOMENTUM MEL Plan Indicators (Indicator number from MOMENTUM MEL plan)
Working Directly with Partners	**Not applicable**
Creating Effective Local Partnerships	**Not applicable**
Recognizing and Investing in Local Capacity	Number of organizations with increased organizational performance **(CAP.5)**
	Percent of organizations with increased organizational and/or technical capacity **(CAP.6)**
	Amount of funding to local partners via subawards, professional service agreements, and task orders **(Safe Surgery)**
	Funding allocation and count of beneficiaries (local partners) through FAA and on track to meet award targets **(Country and Global Leadership)**
Engaging Communities Directly	Examples of organization-level entities that modify programs to better reflect locally prevailing social norms, values, beliefs, and practices that influence health outcomes **(CAP.1)**
	Examples of system-level entities that modify programs to better reflect locally prevailing social norms, values, beliefs, and practices that influence health outcomes **(CAP.2)**
	Examples of health care workers who use client or other feedback to improve program reach, coverage, or effectiveness **(CAP.3)**
	Examples of community-based facilities that use client or other feedback to improve program reach, coverage, or effectiveness **(CAP.4)**
	Number of approaches implemented by MOMENTUM that engage the community **(CE.2)**
	Number of USG engagements jointly undertaken with the private sector to achieve a U.S. foreign assistance objective **(PSE/MSP.1)**
	Number of new solutions developed through partnerships to address problems prioritized by partnership members **(PSE/MSP.2)**
	Percent of entities receiving MOMENTUM support that introduce, strengthen, or contribute to institutionalizing adaptive learning **(AL.1)**
	Examples of MOMENTUM supported entities using data generated through their monitoring systems to modify activities or strategies **(AL.2)**
	Number of co-created plans using human-centered design (HCD) principles **(Country and Global Leadership)**

MOMENTUM's indicators also capture other aspects of its localization efforts.

Indicator (MEL Framework Number/Source)
• Percent of entities receiving MOMENTUM support that introduce, strengthen, or contribute to institutionalizing adaptive learning **(AL.1)**
• Examples of MOMENTUM-supported entities using data generated through their monitoring systems to modify activities or strategies **(AL.2)**
• Number of country representatives serving as active members of global technical consultations and leadership fora as a result of MOMENTUM's efforts **(GL.1)**
• Number of changes as a direct or indirect result of partnership intervention **(PSE/MSP.3)**
• Number of health workers trained/mentored/coached to improve professional capacity **(Country and Global Leadership)**
• Number of countries with an Advocacy and Accountability Collaborative (TAAC) established **(Country and Global Leadership)**
• Number of new/revised policies/strategies to which award contributed **(Country and Global Leadership)**
• Total funds mobilized (in-country) through partnerships to address priority MNCH/FP/RH issues **(Country and Global Leadership)**
• Number/percent of communities supported by award with improved ARC-D Health or standard community health resilience tool scores **(Integrated Health Resilience)**
• Number/percent of supported district health departments and communes that utilized data for planning and decision-making in last three months **(Integrated Health Resilience)**
• Percent of providers trained in target surgical MH/FP services and related skills deemed competent at end of training **(Safe Surgery)**
• Number of trainers trained with MOMENTUM support in project focal areas and safe surgery principles **(Safe Surgery)**
• Number of practitioners trained by MOMENTUM trained master trainers. **(Safe Surgery)**

What Challenges Do MOMENTUM Awards See in Measuring Localization?

Reflections on the Localization Measurement Process

From across the MOMENTUM awards

- **Definition of localization:** Localization holds various meanings to different parties involved, which leads to diverse expectations and incomplete assessments of change.

- **Metrics:** A numerical count of localization efforts may not accurately capture the actual work being carried out toward achieving localization.

    o A numerical count doesn't indicate quality or magnitude of resources required for the efforts in question.

    o Counts provide limited insight on the quality or efficacy of localization efforts. Quality and the results from efforts may be more important than the number of efforts.

- **Timeline:** Effective localization takes longer periods than what may be covered in a project period—measurement may capture immediate results but may not reflect longer-term outcomes.

    o Co-creation and organizational and capacity change take time and may require longer initial engagement processes.

    o Measurement of outcomes may extend beyond the five-year program life cycle.

Summary and Recommendations

Summary

- USAID's localization agenda and measurement strategy were released after MOMENTUM established its theory of change and MEL frameworks.

- USAID's locally-led categories and MOMENTUM's indicators share substantial overlap.

- MOMENTUM awards' monitoring captures all four of USAID's categories of good leadership.

  - Certain metrics used by the MOMENTUM awards capture other facets of localization beyond USAID's 14 best practices, reflecting MOMENTUM's theory of change.

Recommendations

- **MOMENTUM** can report against USAID's locally-led program indicator and complement that reporting with its other indicators and documentation to provide a fuller picture of how the suite contributes to localization.

- **MOMENTUM** can incorporate a measure of funding to local partners as a way to monitor its progress toward USAID localization targets.

- **Other USAID awards** can adopt or adapt MOMENTUM indicators for use in their MEL plans.

- **New USAID awards** should review USAID's categories of good practices and 14 good practices as they develop their MEL plans.

- **USAID** should use its locally-led development indicators alongside other monitoring data from its implementing partners to track progress in supporting locally-led development.

- **USAID** should consider how implementing partners support categories of *Working Directly with Partners* and *Creating Effective Local Partnerships* and incorporate some of those into the list of good practices.

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