PRACTICAL GUIDELINES *for* FINANCIAL SUSTAINABILITY *for* TRANSITIONS TO LOCAL OWNERSHIP

STOPPING AS SUCCESS: LOCALLY LED TRANSITIONS IN DEVELOPMENT (SAS+)

PURPOSE OF THIS RESOURCE

This resource provides practical guidance on financial sustainability in transitions to development, humanitarian, and peacebuilding practitioners at all levels. It was developed as part of the Stopping As Success: Locally Led Transitions in Development (SAS+) activity, implemented by a consortium consisting of CDA Collaborative Learning Projects, Peace Direct, and Search for Common Ground, with funding under the Local Works Program in the Bureau for Inclusive Growth, Partnerships, and Innovation (IPI) in the Local, Faith, and Transformative Partnerships Hub (USAID/IPI/LFT Hub). It draws from 19 case studies of transitions involving international and local entities,[1] as well as the experiences accompanying and learning alongside 10+ SAS+ partnerships with transitioning organizations in nearly 30 contexts. Through this research and accompaniment, the topic of financial sustainability has remained critical to responsible transitions to local ownership. This set of practical guidelines will support financial sustainability planning for international and local entities involved in transitions.

Transitions at a programmatic[2] or organizational[3] level will find these guidelines relevant to their planning and implementation processes. This topic is critical to any conversation about successful transitions and true locally led development. After transition, raising funds as a new local entity can be difficult. SAS+ research highlights key decisions made before, during, and after a transition can have wide-ranging effects on a new organization's ability to meet these challenges.

For simplicity, in many instances this document directly addresses international and local actors. However, SAS+ recommends those using the guidance to tailor advice as appropriate. Finally, this guidance is not sector specific. Guidelines are meant to be organizational and relational, rather than tailored to a specific type of programming.

What do we mean by 'financial sustainability'?
The maintenance of the financial health and sustainability of local entities after their transition from an international entity.

What do we mean by 'local'?
The term 'local' has different connotations in different contexts and is a contested term. In the context of SAS+ research, 'local organization' refers to CSOs or NGOs in the global South undergoing a process of transition in their partnership with international actors.[4] This encompasses organizations that work at the local and national level. The broader term 'local actors' recognizes the diversity of this group, which can include individuals, communities, newly created NGOs or CSOs, NGOs that have devolved from an international federation, or local and national governments that set their own agendas, develop solutions, and lead to make those solutions a reality.

What do we mean by 'transition'?
A transition, done responsibly, refers to a jointly led, planned, and gradual process of transfer of technical and procedural ownership from an international to local level, while maintaining some form of relationship. Responsible transitions can happen at an organizational, programmatic, or activity level. Responsible transitions focus on achieving a shared vision of transition that sets up local actors to sustain and grow their impact.

HOW TO USE THIS RESOURCE

This resource primarily speaks to local and international actors involved in a programmatic or organizational transition, while including some guidance directed towards donors and funders of transition processes. The first section, the "Do's and Don'ts", will be most useful for transitioning entities that are looking to ensure they have a clear understanding of the activities and practices that support financial sustainability, even after the transition has taken place. This section identifies guiding principles and helpful tips to incorporate as the transition takes place, covering the topics of transformation, board development, engagement with volunteers, and the difference between proactive and reactive fundraising.

[1] SAS+ uses the term 'entity' to refer to a range of organizations, social enterprises, networks, and other organizational structures that we have seen be a part of transition processes. 'Organizations' will be used throughout the document to refer to specific examples and for referring to organizations involved in SAS+ case studies.
[2] Programmatic transitions refer to the transfer of responsibility of a project or activity.
[3] Organizational transitions refer to transitions that may happen outside the scope of a project or grant, and often involve a transfer of responsibility or ownership of a local office/entity to local staff.
[4] 'International actors' refers to the range of individual practitioners and consultants, networks, and the leadership and staff within organizations whose programmatic and operational work takes place across multiple geographies that are not limited to one country.

Transitioning entities face many challenges that can arise from these topics, and as such engaging in understanding the importance of core funding and diversified funding is a key and vital process to any stage of a transition. Key lessons have to do with anchoring communication and partnership at the core of each step of the transition process when it comes to the financial health of the entity. There is also a separate checklist on core funding and how to make it accessible to transitioning entities that concerns both transitioning entities and funders. For transitioning entities, the checklist can be a tool for accountability to funders, and for funders it can be a resource to ensure they are facilitating access to core funding for transitioning entities.

NAVIGATION KEY

Use the following visual guide to find information most relevant for specific actors:

LNGOs and CSOs

INGOs

Donors

The second section is relevant for all actors and entities, local and international, that make up the partnership in which the transition is taking place. This section serves as an accountability mechanism, outlining a chronological list for check-in points and opportunities that have been identified for an international entity to provide support to the transitioning entity, therefore fostering the continued partnership that will ensure the success of a transition. Many organizations feel pressure to follow the "INGO model" of winning grants from international donors, which means competing with large and/or other local organizations with established processes and relationships. Decisions made before, during, and after a transition can have wide-ranging effects on a new organization's ability to meet these challenges.

What does this mean for donors and funders?

These guidelines, while primarily for transitioning entities, offer insight to donors and funders to understand the place they can hold as local entities transition to independent organizations or programs. Funders and donors can interpret these guidelines as a resource to map how they can support newly formed entities as a result of a transition, and what that means when it comes to the newly formed entity's positionality. The SAS+ consortium, through the creation of case studies and accompaniment support to organizations going through a transition, has more often than not witnessed situations where international actors acted as intermediaries, financial and otherwise, for local actors.

As you navigate the transition you are undergoing, consider section 1 as practices and tips to incorporate as you also go through the accountability mechanisms listed below in section 2. As a reader, and depending on your needs, you can start with either section.

1. THE DO'S AND DON'TS - HOW CAN LOCAL NGOS AND CSOS NAVIGATE THE PROCESS OF FINANCIAL SUSTAINABILITY DURING A TRANSITION?

Transformation, Not Only Transition

DO build authentic partnerships, DON'T only look for transactional relationships

Relationships built on trust and open communication create space for honest discussions where possibilities for financial health and sustainability of an entity are explored. Responsible transitions originate from partnerships that are collaborative and based on a shared vision of transition that considers the short- and long-term financial sustainability of the local entity, especially in transitions where a new entity is created. The Reverse Call for Proposals initiative by Re-imagining the INGO (RINGO) is an example of an effort in reshaping partnerships that are driven by local entities that carry out community-led work. The aim of this initiative is to create and foster equitable partnerships.

For an approach that strengthens relationships and builds trust, consider mutual capacity strengthening, where all partners participate equally, based on their own strengths and needs, in processes that strengthen their skills, knowledge, experience, and networks. Staff that are transitioning out of an international entity and into a new entity often have expertise in technical and programmatic areas, but need to strengthen skills relevant to business development, fundraising, and other areas critical to financial sustainability.

When carrying out mutual capacity strengthening in transitions, for instance, in addition to considering dedicated technical capacities like financial management, business development, proposal writing, and fundraising training, consider local knowledge of the context that can support opportunity mapping (an activity which involves identifying areas where projects and programs can have the highest impact by increasing stakeholder engagement and collaboration between local and international entities).

SAS+ Tip: Many donors are looking to improve their funding practices to better support local leadership and should be considered when utilizing mutual capacity strengthening, which can involve articulating challenges and promising practices, as well as feedback on funding strategies and policies.

Diversified Funding

DO consider alternate funding models, DON'T restrict opportunities for funding

ALTERNATIVE FUNDING MODELS INCLUDE, BUT ARE NOT LIMITED TO:

- Social enterprises
- For-profit consultation wings
- Microcredit lending arms
- Land/premises to let
- Membership fees (in the case of the creation of a network or membership based organization)

Nearly all of the local organizations SAS+ partnered with for case studies and accompaniment have described a diversified funding stream as important to their success. Diversified funding can include support from local government, international donors, public campaigns, and private sector funding. This provides security from funding shocks, as well as allowing transitioning entities a degree of independence from donor and international entity priorities.

Alternative funding models can be effectively leveraged to achieve the missions of transitioning NGOs, and in some cases supplementing more traditional grant-funded activities by providing unrestricted funding. When discussing the transition plan, the international and local entity should discuss what other funding models are available in the operating context of the local entity. In order to have a stronger understanding of the financial landscape where a transition is taking place, consultations with lawyers or business consultants and strategic planning exercises (ideally funded by the international entity) should give staff a good idea of the possibilities available. For example, strategic planning exercises could entail an initial meeting among staff representing each department within an organization to brainstorm and identify various types of funders (international, local, governments, etc.), generating a list that can be shared more widely among staff to contribute and identify points of contact. Following this, staff can begin outreach and use the snowball sampling method of asking points of contact who they would recommend getting in touch with, then continuing outreach. Through organizations like Humentum, actors going through a transition that require further insight in their financial planning can sign up for courses tailored to their needs.

SAS+ Tip: If a business plan was not included in the international organization's transition planning, transitioning entities should conduct planning exercises such as opportunity mapping mentioned in the previous section to identify diverse sources of funding across government, the private sector, the public sector, and other donors.

Examples of diversified funding in transitions

SAS+ accompaniment partners have sought to diversify their funding model to meet funding needs within the transition process, and in pursuit of longer term sustainability and transformation for their organization and immediate communities. We've seen partners also explore other non-donor funding streams, such as through the creation of social enterprises, offering specialized training courses as an alternative funding stream. For example, with the shrinking of international funds and the decision to explore domestic sources of funding, SOS Colombia was able to form strong relationships with national and local government bodies that fed into its financial sustainability.[5]
Learn more with this SAS+ resource: How to Access Unrestricted Funding

[5] SOS Children's Villages International and Aldeas Infantiles SOS Colombia - Stopping As Success

Transition-Friendly Calls for Proposals

DO proactive fundraising, DON'T fundraise only based on reaction

Fundraising is an inherent part of sustaining the financial stability and health of an organization. It is common for organizations to put their focus on seeking out bids for funding, as opposed to integrating responses to proposals within their organizational strategy when mapping out activities. Two models of fundraising, reactive versus proactive, are detailed below.

REACTIVE FUNDRAISING MODEL	V.S.	PROACTIVE FUNDRAISING MODEL
Donor-Driven		**Organization-Driven**
Donor puts out an open call		Organization defines their case for support
I/NGOs apply for a grant		Organization drafts project ideas into concept notes with budgets
Donor assesses and chooses		Organization engages with donors that are a good fit for the concept notes

Advantages associated with a proactive, donor-driven fundraising model:

- Organizations have more ability to shape the relationship they have with a funder/donor
- Funders/donors fit into the proposals, rather than the proposals fitting the funder/donor
- Security in diversified financing and more freedom to match a funder/donor to a proposal
- Through the security in diversified financing, there can also be a reduction in restrictions for funding

SAS+ Tip: Once a case for support is developed, doing proactive fundraising becomes a part of everyday advocacy and project work. Importantly, most often, when actors get funding for transformation work, it is usually through an existing grant or relationship with a funder - rather than having to apply for a separate funding stream. Partners in transition can approach funders to make the case for why the transition work is relevant and how it will add value and impact the existing work. Thus, while this is still a donor-driven process, transitioning entities can set the tone and boundaries for funding themselves, based on ongoing work. Consider hiring a communications consultant to support the drafting of the case for support, especially if this is a case of a transitioning entity working with their international counterpart.

The importance of core funding

In addition to ensuring there is dedicated funding at each stage of a transition, transition planning should consider, even if at a high level, priorities for financial sustainability post-transition. Doing so will often take into account core costs, which can prevent start-stop instances due to lack of funding. For organizational transitions, core funding is a vital part of any transition, as this will cover costs linked to registration fees (fees paid to governments) and operational costs (rent, utilities, even gasoline). Additional costs to cover under core funding include fundraising and business development costs and bridge funding for salaries. Core funding can also cover consultant fees for strategic planning, business planning, and capacity strengthening.

- When writing and creating a budget, consider a budget line that would account 10% to 20% for general and administrative costs.
- Allocating a staff member's salary across the different projects they work in would also ensure that their time would be compensated in a way that they are not reliant on one project.
- Fundraising comes in different shapes and sizes, and while proposals to donors and funders are a good way to get a project fully (or close to fully) funded, fundraising within communities and to individuals can support core costs.

This can be seen as an opportunity for donors to provide general support grants to both international and transitioning local entities. Initial SAS+ evidence indicates that it takes roughly 10% of operating expenses to ensure a responsible transition - including staff time and other resources needed such as office space, training, etc.

Below is a list of key activities and mindsets to hold onto when drafting various proposals, which funders/donors should also keep as considerations as they give out grants:

1. For funders and donors issuing calls for proposals, include funding for capacity strengthening in financial management, grants management, proposal development, and other key skills, as well as flexibility for entities to define their own capacity strengthening needs.
2. Include requirements for offerors to define a sustainability planning process for the entity transitioning into a leading role or an entirely new, independent entity. This could be an inception report in the proposal followed by a detailed plan later in the program setting milestones towards financial sustainability of the transitioning entity.
3. Proactively work with international and local entities to ensure that property disposition planning prioritizes the needs of transitioning entities, and that titles to important assets (vehicles, computers, information technology) are retained.

This section is for transitioning entities to better hold to account their potential funders when it comes to getting support for core funding, but can also be a reference point for funders on the level of accessibility to core funds they give to transitioning entities. In addition to making the case to funders for general support grants to address the general and administrative costs of a transition, SAS+ has seen international entities leverage existing unrestricted resources or relevant grant funding to cover the costs of transition planning and, in some cases, establishing a new, independent entity.

Examples of innovative funding practices for responsible transitions

- Sida grant for Carter Center to establish Sawabenu: The Sweden International Development Cooperation Agency (Sida) has given the Carter Center a two-year grant to develop Sawabenu, a local Liberian organization, that has stemmed from the former Rule of Law program within the Carter Center. This grant allows all parties involved in the development of Sawabenu to dedicate time and resources to setting up the new organization's operational and programmatic focus as well as fundraising efforts to support sustainability after the two-year grant. This is an important example of dedicated grant funding for the transition process itself and how a responsible and intentional process can support local financial sustainability.
- During the transition period, HelpAge International's Transformation team manages a budget to support transition activities in different countries. Transition activities can include hiring consultants to develop the strategy and business model, registration costs, legal support costs, Board meeting costs, systems/software account setups, etc. When the national organization becomes fully independent from HelpAge International, also known as the "Go Live" point, HelpAge commits to supporting the new organization for 3 years with flexible funding which is intended for organizational development purposes. The amount is determined on an annual basis.

Financial and compliance requirements can be difficult for transitioning entities to meet, resulting in very little grant money going directly to local entities from international donors. The following checklist enables transitioning entities to examine the extent to which the donor/funder is shifting power in their own practices.

Does the potential funder/donor:

- Allow reporting in the local language, or provide funding for translation? If not, is there a budget for translation and copy editing, as well as interpretation during meetings, workshops, and other related activities?
- Create special categories of assistance for local entities, which include mentoring and/or capacity strengthening in financial management and reporting?
- Tailor financial reporting to host countries to allow for culturally sensitive standards (e.g., inclusion of budgets for culturally appropriate norms such as catering events with light food and beverages)?
- Have dedicated funding for co-creation processes to allow for relationship building and inclusive, collaborative design of the transition?

If the answer to any of the above questions is "no," international and local actors should raise these points when budgeting for the transition. For donors and funders reading this section, consider what steps you would need to take to be able to say "yes" to each question and how that might align with internal goals and strategies guiding your funding practices.

SAS+ Tip: Don't limit your research into philanthropic funders and donors to Europe and North America - a study by the Hauser Institute for Civil Society at the Harvard Kennedy School[6] found a total of 260,358 foundations across the globe that spanned from North America to Hong Kong, through Nigeria, Colombia and Saudi Arabia.

[6] Global Philanthropy Report (harvard.edu)

Board Development

DO invest in board development, DON'T shy away from building the board together

SAS+ evidence has shown that investing in board development prior to a transition can be vital to transitioning entities, especially when it comes to assisting with fundraising, bringing in technical knowledge, filling capacity gaps, and advocating on behalf of and for the new entity. This dynamic, coupled with an authentic partnership between the international and local transitioning entity, is a key opportunity for the transitioning entity to advocate for themselves with international actors and donors before, during, and after transitions.

International actors can assist with the recruitment process by virtue of their reputation, but local staff are often best positioned to identify potential directors. In the case of Mercy Corps' programmatic transition to Partner Microcredit Foundation,[7] Mercy Corps lent its prestige and reputation in order to recruit talented and capable board members for Partner in Bosnia and Herzegovina. Prior to transition, Mercy Corps recruited Bosnians who represented all three main ethnic groups to serve on an Advisory Council with the aim of becoming board members for the independent Bosnian entity later. The Partner Board was engaged in oversight, strategic advice, and external representation. Due to the overarching success of Partner, two Mercy Corps staff stayed on the board in hopes that their board members would learn what made Partner so successful in order to replicate the results in similar microfinance programs in other countries.

SAS+ Tip: Consider allocating board seats to representatives of the international entity to maintain an institutional connection, which can also be an important opportunity to strengthen the capacity of the international entity (as illustrated in the Parter Microcredit Foundation example above).

Engaging Volunteers

DO consider creating a volunteer base, DON'T dismiss them when their contributions are over

With a transition taking place, the departing staff's technical expertise and relationships with donors and other international entities can present a challenge to the survival of transitioning entities.

International volunteer organizations and academic interns (such as university students) can support the transitioning entity in several crucial ways (specifically if they speak native or fluent English). Think of focusing on drafting, reviewing, copy-editing, and translating documents from grant proposals to reporting requirements. They may also assist with technology skills useful for database management, IT work, and computer skills development.

Transitioning entities can negotiate with the international entity if they would be willing to place interns with them, or to establish partnerships with relevant universities. Alternatively, by tracking volunteer hours on a regular basis and quantifying and including the financial benefit that volunteers offer to a prospective funder/donor within proposals, the transitioning entity is able to demonstrate how a funder/donor's investment can go further thanks to the cost sharing element of engaging with volunteers.

SAS+ Tip: Reach out to local branches of volunteer organizations if you don't have an existing base of volunteers.

Sections 1 and 2 of these guidelines are intrinsically linked as they discuss the same process from different perspectives.

As you navigate the transition you are undergoing, consider section 1 as practices and tips to incorporate as you also go through the accountability mechanisms listed below in section 2.

[7] Mercy Corps and Partner Microcredit Foundation - Stopping as Success

2. HOLDING INTERNATIONAL ACTORS TO ACCOUNT DURING A TRANSITION TO ENSURE FINANCIAL SUSTAINABILITY

The following section is listed in chronological order, and can be used as a reference point for conversations between transitioning entities and the respective international entity to support financial sustainability. Further considerations for before, during, or after a transition can be found in the SAS+ Transition Cycle Workbook.[8]

SAS+ Tip: You can use this section as a standalone additional resource as you go through the SAS+ Transition Cycle Workbook.

Before the Transition

Strategic Planning

Successful approaches to transitions are typically defined by an intentional, proactive, and collaborative process beginning with strategic planning. Transitioning entities would benefit from support on setting a clear strategic goal, a vision of their ideal future state, or a complete understanding of the legal and governance requirements of different models of association in the country in question.[9] The staff of the transitioning entity should decide its strategic vision. This may include a strategy or structure with significant differences from the INGO model,[10] or a decision not to start up a new entity at all.

One important consideration here is that the goal is not to replicate the INGO model: the transitioning entity will likely look and feel much different. The HelpAge International Transformation Team experienced this process as 14 of their country offices engaged in a transition process one after the other. Each transitioned entity had to submit a proposal to HelpAge International on the type of governance structure they would adopt, ensuring that the transitioning thinking is done in a co-design process led by the transitioning entity. HelpAge International also came forward with seed funding for each transitioning entity, to support them with any consultancy or strategic/business planning needs.[11]

Business Planning

This should follow the strategic planning exercise and a decision on the model and mission of the new entity. A transitioning entity would benefit from support from a local business consultant and dedicated staff time from the international entity in order to do funding and donor analyses, capacity assessments, and other critical components of a business plan. Key activities to do in this stage include:

1. Define the organizational management structure and skill sets available
2. Identify skill gaps, especially operations and financial capacities relevant to the governance and business model adopted
3. Identify activities the international entity can support with funds to address the aforementioned gaps
4. Lay out the comparative advantage of the transitioning entity
5. Describe the market, including potential donors and strategic partners
6. Describe the business model, including the marketing and engagement strategy for each potential funding source category (this can double as a reference for future advocacy messaging work)

SAS+ Tip: Business plans should include sections on the potential for asset transfer and the related financial and legal ramifications.

During the Transition

Asset Transfer

SAS+ evidence highlights that transitioning entities often face a lack of assets: hard assets such as office space, money, or computers; and soft assets such as knowledge resources or operational processes.

[8] SAS+ Transition Cycle Workbook, forthcoming.
[9] SAS+ Transformation Futures report.
[10] See the SAS+ Transition Cycle Workbook, forthcoming, for guidance on developing a transition vision and plan.
[11] Our commitment to localisation - HelpAge International

Seed funding from the international entity can be important to sustainability when combined with other forms of institutional support. If there is a period of overlap between international and local entity registration, international entities should consider sharing office space and allowing staff to spend a certain percentage of time on the new entity. Institutional knowledge such as proposal databases, HR and finance systems, and financial management processes are low-cost ways to set local entities up for success.

Forging Connections

Transitioning entities will benefit from creating their own personal connections with donor staff, key government stakeholders, potential partners, and other potential sources of funding or strategic collaboration important for financial sustainability. International actors or their former staff can continue to engage with the transitioning entities in a variety of ways. A great example of this is the Nuru Collective.[12] The SAS+ team highlighted the way in which the Nuru International team have continuously been supportive to transitioning Nuru entities in Africa.[13] The Nuru International team based in the country where each African entity was created has helped transitioning staff set up their own governance and other sustainability structures.

SAS+ Tip: Facilitate relationship development[14] between transitioning entity staff and donors and potential strategic partners. This can be through formal introductions, informal meet-ups, or simply inviting the staff of the transitioning entities to donor meetings.

After the Transition

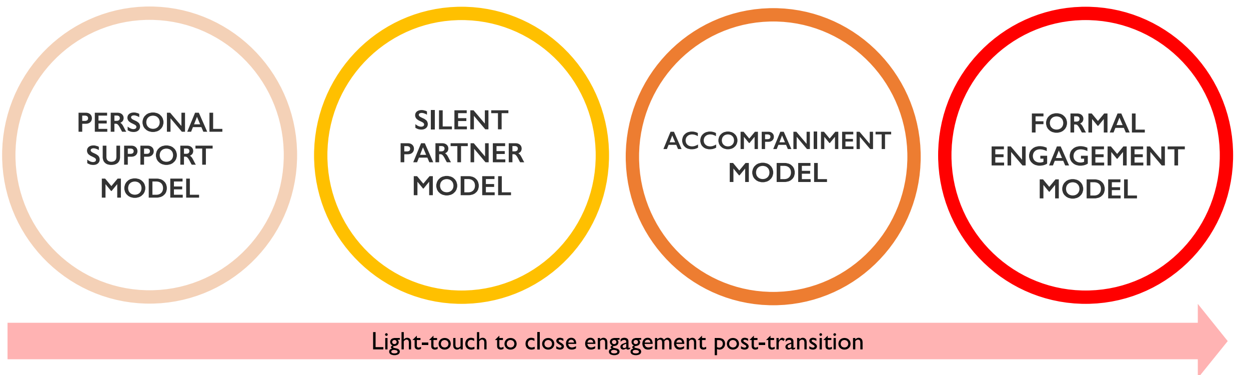
Continuing the Relationship

One notable commonality across SAS+ cases is the existence of an ongoing relationship between international and local entities beyond the transition. One such example of a continued relationship is between the Nuru organizations, as they interact via the Nuru Collective. Although the level of support may vary depending on context, there is security in knowing that there is another organization that has gone through or is going through something similar.

Additionally, the chairing of the Collective rotates and is shared amongst the managing directors of all Nuru entities, creating a sense of shared ownership and community in a process they each went through.

Post-Transition Partnership Models

These are the most common outcomes of post-transition partnerships SAS+ has experienced with partners who have completed a responsible transition.



Personal Support Model	Silent Partner Model	Accompaniment Model	Formal Engagement Model
Continued contact between individuals involved in organizations or programs post-transition	Behind the scenes support from an INGO to an NGO or CSO during and after the transition process	Ongoing support from INGOs to an NGO or CSO during and after the transition process in an ad hoc way	Post-transition engagement defined in a formal way, for instance in a written agreement

SAS+ Tip: Keep the relationship alive after transition. If formal arrangements are unrealistic, informal channels of advice, donor introductions, mutual capacity strengthening, and business development support can make a big difference.

[12] https://nuruinternational.org/

[13] Grace Boone, Mélina Villeneuve, Amy Gaman, and Matt Lineal, "The Role of Responsible Transitions in Supporting Proximate Leadership and Fostering Global Solidarity," *Routledge - Shift The Power,* forthcoming.

[14] The Nine Roles that Intermediaries can Play in International Cooperation - Peace Direct

ABOUT STOPPING AS SUCCESS (SAS+)

SAS+ is a four-year cooperative agreement (2021-2025) funded under the Local Works Program of the Bureau for Inclusive Growth, Partnerships, and Innovation (IPI) in the Local, Faith, and Transformative Partnerships Hub (USAID/IPI/LFT Hub). SAS+ generates learning about how to facilitate development transitions from international to local actors at the organizational, project, and activity level. The SAS+ goals are:

- To enable development partnerships to be more locally led;
- For transitions to be more effective and sustainable for the local actors involved; and
- For systems of development actors to be more responsive to the communities in which they work, especially the dynamics of conflict affected contexts.

From 2022-2024, SAS+ has accompanied organizations actively undergoing or planning for transitions, and leveraged the learning outcomes of the original Stopping As Success (SAS) program (2017-2020), including 19 original case studies and 25+ corresponding tools and resources.

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