

TOOL FOR ASSESSMENT OF TRANSFORMATIVE LOCALISATION

TRANSFORMATIVE LOCALISATION MEASUREMENT TOOL FOR NGO

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INTRODUCTION

This tool was developed by BLB/ACPP with the support of Fernando Almansa, as part of a Humanitarian Action Agreement in Niger funded by eLankidetza. It is designed not only as a measurement tool, but also **as a means for critical reflection and for driving organisational and sectoral change within the field of International solidarity cooperation**[1]. Its purpose is to identify gaps, generate lessons learned, and support real processes of transformation in organisational practices. It is aimed at both Local and National Organisations (LNO) and International NGOs (INGOs), so that they can assess their progress toward Transformative Localisation.

TARTALO tool has been developed based on conceptual advances made in recent years regarding Transformative Localisation and Humanitarian Sovereignty, as well as on widely documented experiences in various contexts. The reflections and lessons learned promoted by BLB/ACPP and its partner organisations—particularly in Niger and Palestine—along with contributions from eLankidetza, La Coordinadora Estatal de ONG in Spain (NGO Coordination Network) and the AECID (Spanish Cooperation Agency), have been key inputs for its development. TARTALO represents a continuation and further development of the HEVAP-ARC and TAHUSO tools, developed by Fernando Almansa with the support of eLankidetza and various NGOs involved in processes to improve Participation, Accountability, and Humanitarian Sovereignty.

1 International solidarity cooperation includes development cooperation, humanitarian action, and international peace programs, all of which are based on solidarity and justice among peoples.

CONCEPTUAL FRAMEWORK

TARTALO tool builds on a long process of conceptual evolution, experiences, and tools that preceded it, while also offering a new approach. Its framework is grounded in Transformative Localisation and Humanitarian Sovereignty, two concepts that share the same vision: recognizing the authority of communities and their organisations and ensuring their effective capacity to decide on the strategies and actions that affect them. The difference between the two lies primarily in their starting points. Transformative Localisation approaches this transformation through the changes that must occur within NGOs, in their relationships, and in the cooperation system; Humanitarian Sovereignty starts directly from the rights, authority, and agency of communities and individuals. However, both concepts are mutually inclusive and reinforcing: Transformative Localisation incorporates the sovereignty of communities, while Humanitarian Sovereignty necessarily implies a transformation of organisations and the cooperation system.

The tool identifies and highlights the key elements that have shaped the evolution of localisation within the framework of the Grand Bargain, including financing, coordination, capacity building, equitable partnerships, local leadership, quality financing, the participation of affected communities, and risk management. However, TARTALO goes beyond this framework by incorporating a transformative perspective focused on power relations, authority, and the effective participation of local populations; strategic partnerships; shared knowledge management; structural change in the cooperation system; gender; and the sustainability of funding. Thus, it does not merely measure an increased presence or participation of local actors, but rather analyses the extent to which organisations' practices recognize the authority and decision-making capacity of local communities and contribute to a real transformation of the international solidarity cooperation system.

Thus, the main concepts on which TARTALO is based and built are:

TRANSFORMATIVE LOCALISATION:

A process of transforming power relations and decision-making within the international solidarity system, in which the legitimacy and authority of individuals and their organisations are recognized regarding the strategies that affect their communities. This is a political commitment to achieving more ethical, fair, and solidarity-based cooperation, in which the role of international NGOs is redefined, influencing the system itself and supporting processes that empower local and national actors to take the lead without replacing or displacing them.

HUMANITARIAN SOVEREIGNTY:

The right and effective capacity of populations that are the focus of humanitarian action—and of their local and national organisations—to decide and define criteria, strategies, and actions in a participatory, inclusive, autonomous, and responsible way; and to ensure full accountability from all humanitarian actors working with those populations. By extension, this concept applies to the fields of development and peace.

INTERNATIONAL SOLIDARITY COOPERATION:

Understood as all forms of international cooperation based on the ethical principles of Humanity, Justice, Peace, and Solidarity, encompassing the three main pillars of cooperation: Humanitarian Action, Development, and Peace.

AUTHORITY OF THE TARGET POPULATION:

The target population of international solidarity-based cooperation, as the agents of their own lives and realities, possesses “auctoritas” and “agency” to make fully informed decisions regarding the key aspects of cooperation that concern them.

TRANSFORMATIVE PARTICIPATION:

A process of participation and accountability understood as a process of empowerment, respect, dignity, rights and citizenship. It implies the possibility and effective capacity of the target population to participate in a transformative way throughout the entire management cycle of humanitarian action, development, or peacebuilding. It is distinguished from **Operational or Instrumental Participation**, understood as involvement in specific activities within the scope of a project and as a facilitating process for the project’s implementation. The dividing line between the two is the target populations’ decision-making capacity regarding solidarity-based cooperation programs.

ACCOUNTABILITY:

The legitimate right of communities to have full, timely, reliable, understandable, and accessible access to all information regarding international solidarity cooperation initiatives that affect them, including their design, implementation, evaluation, and lessons learned.

STRUCTURE OF TARTALO

TARTALO is structured into **several distinct phases**:



PHASE 1:
Analytical Assessment

In-depth assessment of the organisation's progress toward Transformative Localisation based on 6 key parameters, 22 components and 70 elements.



The Result: ILT

Calculation of the Transformative Location Index, a comprehensive overview of gaps and capabilities.



PHASE 2:
Action Plan

A roadmap aimed at consolidating best practices and addressing the organisational shortcomings related to Transformative Localisation identified in the assessment.

THE ECOSYSTEM OF TARTALO



The tool is structured around **six major basic parameters of Transformative Localisation**[2], understood as the broad areas or "categories" that organise the assessment. Each parameter is divided into **components**, which group more specific aspects within that area. In turn, the components are broken down into 70 **elements**, formulated as guiding questions that help clarify and operationalize the parameters and components, facilitating their analysis and assessment.

2 The sociocultural, political, and organisational context is mainstreamed across the tool's six parameters, as it is considered a factor that shapes and permeates all areas of Transformative Localisation.

	PARAMETERS	COMPONENTS
1	**Strategic Partnerships**	1.1. Vision, shared values and political position and recognition of uniqueness 1.2. Shared strategy 1.3. Trajectory over time 1.4. Transparency, accountability and confidentiality 1.5. Decision-making capacity 1.6. Risk management 1.7. Care and spaces for dialogue
2	**Authority and Transformative Participation**	2.1. Recognition of the sovereignty and authority of the people 2.2. Transparency and accountability to the people 2.3. Inclusive processes 2.4. Process-oriented approach 2.5. Participatory culture and social articulation
3	**Capacities and Knowledge Management**	3.1. Organisational development 3.2. Local knowledge
4	**Structural Change in the International Cooperation System**	4.1. Organisational transformation 4.2. Leadership of LNO 4.3. Advocacy
5	**Gender**	5.1. Leadership and power 5.2. Transformative participation
6	**Financing**	6.1. Allocation of specific resources for transformative locatization 6.2. Distribution and management of financial resources 6.3. Sustainability and impact

HOW TO USE TARTALO?

TARTALO is a tool that is flexible and adaptable to the specific characteristics of each organisation. It allows organisations to assess their progress toward Transformative Localisation and, based on the results, develop an action plan. The assessment is designed as a participatory self-evaluation based on a scoring system, with the primary goal of fostering **reasoned reflection and internal dialogue about the organisation's practices.**

BEFORE STARTING: HOW TO ORGANISE THE PROCESS

Before starting, it is important to **define how the process will be carried out**. TARTALO can be adapted to the context, needs, and time available of each organisation. This flexibility allows organisations to decide from which perspective the assessment will be conducted, its scope and level of depth, who will participate, and how the time will be organised.

From what perspective is TARTALO applied?

Before beginning the process, it is important to **agree upon and clearly define which reality will be analysed and from what perspective**, so that the work made throughout the exercise refers to the same reality.

> TARTALO is designed for both Local and National Organisations (LNO) and International NGOs (INGO). **Unless explicitly stated otherwise, its elements of analysis apply to both types of organisations**. Some elements specifically address the practices or responsibilities of INGOs and are identified separately. Although these elements may not be applicable to an assessment conducted by an LNO, they can help promote dialogue with partner organisations or encourage reflection and advocacy within the sector. The annex "**Facilitation Guidelines**" provides specific guidance on understanding the different elements.

> **TARTALO can be applied** across an entire organisation; within a specific team, geographical area, or area of intervention; or jointly by several organisations working in the same territory. It can also be used to assess a partnership between two or more organisations. Therefore, different results may be obtained depending on which relationships are being assessed.

To what extent and in what depth is TARTALO applied?

TARTALO allows organisations to adapt both **the scope and the level of depth** of the process according to the objectives and the needs of each organisation.

In terms of scope, the full implementation of TARTALO covers its **6 parameters, 22 components, and 70 elements of analysis**, providing a **comprehensive view** of the different dimensions of Transformative Localisation. It is also possible to carry out a **focused assessment of one or more parameters** when the aim is to explore specific areas in greater depth. In this case, the results should be interpreted with the understanding that they do not represent a comprehensive diagnosis of Transformative Localisation as a whole.

In terms of the level of depth, the assessment can be conducted by analyzing and scoring each of the **70 elements**, or through a simplified approach in which the **22 components are assessed directly**. In this second approach, the elements and their guiding questions can be used as a reference to inform reflection and discussion, without the need to score them individually. This option makes the process more efficient, although it provides a less detailed assessment than the one based on the 70 elements.

Both options can be combined depending on the objective of the process. For example, an organisation may choose to focus on specific parameters while maintaining a detailed analysis of their elements, or to cover all six parameters by conducting the assessment directly at component level.

Who should participate and how can the process be facilitated?

It is recommended to involve **a diverse group of people who are familiar with the organisation and bring together different profiles, roles, and perspectives**. It is also important to include people in leadership positions and with decision-making authority, to help ensure that the reflections and proposals emerging from the process can lead to organisational change. As a general guideline, **the participation of at least 8 people is recommended**.

Not everyone necessarily needs to participate to the same extent in every part of the process. Depending on the parameters or issues being addressed, people with specific knowledge or responsibilities may be involved, while maintaining a core group of participants to ensure continuity throughout the process and facilitate an overall perspective.

TARTALO can be implemented with either internal or external facilitation. In both cases, it is recommended that one person be clearly designated to take on this role and support the process: helping participants understand the concepts and methodology, encouraging participation and the exchange of different perspectives, guiding discussions, managing potentially sensitive debates, and helping ensure effective time management and confidentiality throughout the process.

How long does the process take?

The time required will depend on the scope and level of depth chosen. Before starting, it is important to agree on how much time will be devoted to the process and how it will be distributed across its different phases. As a general guideline, **at least three full working days are recommended** for a complete application of TARTALO, including the assessment and the development of the Action Plan.

It is important to allow enough time for the process. The main value of TARTALO lies in the reflection, dialogue, and exchange of perspectives that help participants justify their assessments, identify areas for improvement, and agree on changes. Insufficient time may limit the depth of discussions or leave important issues unaddressed.

The work does not necessarily have to be concentrated into consecutive days. It can be spread out over several shorter sessions—for example, by working on one or more parameters in each session—which can make it easier for people to participate and allow for more in-depth discussions.

PHASE 1. ANALYTICAL ASSESSMENT

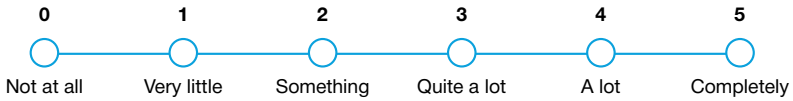
Before beginning the assessment, it is important to take a moment to present and clarify the conceptual framework of Transformative Localisation on which TARTALO is based, as well as the objective and methodology of the process.

How is the assessment made?

Depending on the size of the team, participants can be organised into subgroups to analyse different parameters and facilitate discussion. If this is the first time the tool is being used, it is recommended to start with a single parameter that the entire team works on together, so that everyone fully understands the process. Once the team is familiar with the methodology, the remaining parameters can be distributed among various subgroups. In all cases, the valuations of the different parameters should then be shared with the entire group, and the final score should be validated in a plenary session.

Rating Scale

The assessment is based on an analysis of the TARTALO elements. The analysis of each element results in a rating on a numerical scale from 0 to 5, accompanied by the corresponding rationale, supporting evidence, and identification of potential areas for improvement.



Criteria for conducting the valuation:

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Use Whole Numbers:

Scores should be expressed as whole numbers to encourage discussion and avoid quick agreements that have not been sufficiently justified.



Keep the target population in mind:

Consider how the practices analysed recognize the authority, participation, and decision-making capacity of the target population, rather than solely the organisation's perspective.



Justify each score:

The "Justification for the Score" column should include the reasons and evidence supporting the rating, so that it can be reviewed and understood later.



Note initial ideas for improvement:

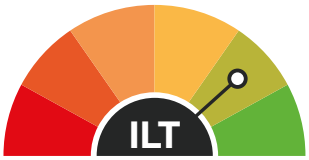
In the "Identification of Areas for Improvement" column, you should list the areas that need improvement for each item, as these will serve as the basis for developing the Action Plan.

The purpose of **this exercise is not to assign a score, but to promote a reasoned discussion of each element**, fostering dialogue and the exchange of perspectives among the organisation's members. For this exercise to be useful, it is important to foster an honest and transparent dialogue that allows the recognition of progress, challenges, disagreements, and areas that require change. TARTALO is focused on reflection and improvement, not on an external evaluation of the organisation.

How should the results be interpreted?

Once the assessment and their explanatory notes are completed, the results are presented in graphs that provide an overview of the components and parameters that require the most attention.

The average of the results obtained for the six parameters will be the Transformative Localisation Index (ILT). This index ranges from 0 to 5, based on the scoring scale.



PHASE 2. ACTION PLAN

Once the assessment is complete, the second phase consists of developing an Action Plan based on the areas for improvement identified. The section titled "Identification of Areas for Improvement" compiles the ideas highlighted during the assessment and serves as a starting point for defining the changes the organisation wishes to implement.

The Action Plan can be developed in two ways: based on the 22 components, using the analysed elements as a reference, or by defining general objectives linked to the six parameters. In the latter case, the objectives are formulated first, and based on them, the necessary actions to achieve them are specified.

For each component or objective, a target score is established, reflecting the organisation's prioritization of the identified changes, and the necessary actions to move forward are aslo defined. It is important to distinguish between short-term actions and medium- or long-term actions, having first defined the time horizon for each period.

Given its transformative nature, the Action Plan must result in concrete changes in the organisation's practices, structures, relationships, and decision-making processes. Therefore, the agreed-upon commitments and changes must be incorporated into the organisation's strategic documents and supported by mechanisms to drive their implementation and monitoring. When the identified changes affect strategic priorities or approaches, they must also lead to the revision and updating of those documents.

To guide the development of the Action Plan, it may be helpful to answer the following questions:

Why?
Priority

Determine the urgency and relevance based on the assessment findings. Avoid taking action without clear prioritisation.

What?
Activities

Defines concrete actions aimed at consolidating best practices and addressing gaps.

How?
Implementation

Established the implementation plan and allocated the necessary resources.

When?
Schedule

Time horizon: Short term (≈ 6 months) and Medium- to long-term (6 months – 2 years).

Factors Influencing the Success of the Action Plan:



FOCUS

Define a small number of actions that are very well prioritized (do not try to address all components at once).



SUSTAINABILITY

Mandatory and realistic allocation of resources. Without resources, there is no plan.



MONITORING

Constant monitoring of the effectiveness of the established activities.



INSTITUTIONALIZATION

Full integration of the Action Plan into the organisation's overall strategic plans.

TAYTALO

TOOL FOR ASSESSMENT OF TRANSFORMATIVE LOCALISATION

SCAN THE QR CODE TO ACCESS THE TOOL AND OTHER RESOURCES ON TRANSFORMATIVE LOCALISATION

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