



# IDENTIFYING LOCAL ACTORS: PARTNER LANDSCAPES

## “How-To” Guide for Conducting a Partner Landscape

USAID uses a partner landscape to help identify potential partners. The focus is usually on finding local or nontraditional organizations that have little or no prior experience working with the Agency but are well positioned to contribute to development impact.

A Mission or Operating Unit (M/OU) may decide to conduct a partner landscape to learn about actors in a specific sector or geography, implement a localization plan, or diversify its partner base. A partner landscape provides an overview and key characteristics of potential partners so USAID can better understand the actors in the local system and maximize program and project impact.

### Partner Landscape: Analysis and Assessment

A partner landscape typically involves two components: an initial analysis and an optional follow-on assessment. The methodology is slightly different for each component, and depends on the information the M/OU is seeking.



#### • The analysis component

identifies key potential partners in a field, sector, or geography. It classifies these potential partners by relevant characteristics, such as type of organization or target beneficiaries. Such an analysis enables M/OUs to understand the broader operating context and design their strategy to maximize impact.



#### • The assessment component

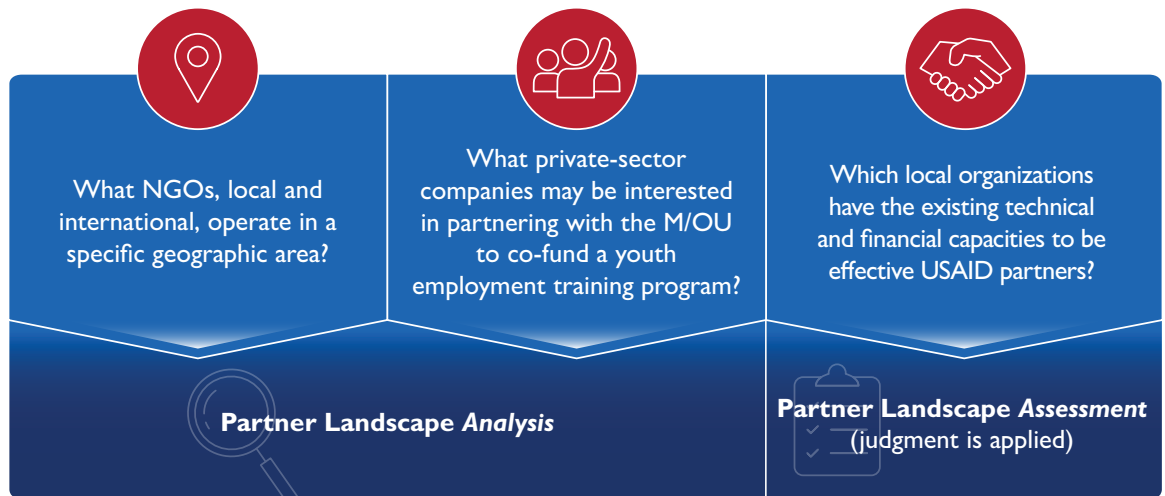
takes the foundational analysis one step further, offering an expert opinion on one or more aspects of the organizations. For example, it might rank them according to perceived readiness to partner with USAID and manage U.S. Government funds. The assessment can identify which partners are better able to address a particular M/OU objective. At a higher level, it can support long-term strategic planning. For example, it might generate insights on actors in local systems and how those systems could be strengthened.

# When and Why to Conduct a Partner Landscape

To determine whether to conduct a partner landscape analysis—and whether it should include a follow-on assessment—begin by defining your M/OU's goal(s) and key question(s). Consider the following points.

- ✓ **Goal:** This could range from compiling a list of 800 local organizations USAID could engage with in the future (an analysis) to developing a list of the top 20 that are currently ready to engage with the M/OU (an assessment).

Your goal will help determine whether an assessment is also needed.



- ✓ **Purpose:** Consider whether to analyze/assess organizations with a narrow set of characteristics within a broad category (such as those implementing a specific intervention across the country) or a broad set of organizations within a narrow category (such as all those serving at-risk youth in a specific district).
- ✓ **Timeline:** Decide when you need the partner landscape completed to inform other M/OU objectives.
- ✓ **Users:** Consider whether you will aim for a single M/OU-wide analysis or prefer separate partner landscapes to serve the differing needs of technical offices.
- ✓ **Methods and resources available:** Determine whether you will carry out the partner landscape internally or externally, and the implications for breadth, depth, timeline, and cost. Within the M/OU, the program office typically leads the partner landscape, though the technical office may lead. Remember to update the leadership team, program and relevant technical office staff, and financial management and acquisition and assistance offices. As you build your team, seek a balance of expertise in the sector, as well as in, for example, monitoring and evaluation, project management, data analysis, or visualization. Also, consider whose voice may be missing.



**Tip:** If you decide to leverage external support, consider tapping a sector expert from that country or region for their knowledge and networks. Local knowledge is invaluable in identifying organizations with a track record of performance and credibility with communities. Local consultants may also speak the local languages, which enables them to conduct interviews and evaluate social media comments about organizations.

Use your answers to the above points to provide the overall goal as background and create a purpose statement that outlines how you propose to meet that goal. This is an example of information to include:

**Background:** USAID Malawi is developing a new Activity to build a network and strengthen capacity of farmer-led organizations. To better target its upcoming Request for Information to appropriate potential partners, the Mission will conduct a partner landscape.

**Purpose Statement:** The partner landscape will identify local or locally established partners with which the Mission may collaborate to achieve Development Objective I of the Country Development Cooperation Strategy: “Economic growth from agriculture in productive areas increased.” Potential partners may include community-based organizations, cooperatives, associations, NGOs, or private-sector actors. They must have expertise in implementing agricultural development interventions, including technology or knowledge transfer to farmers, value chain strengthening, or policy change advocacy in any province. The partner landscape will also assess whether identified organizations have the systems in place to directly receive U.S. Government funds or will require some organizational development support to partner with USAID. The partner landscape will be conducted within the next three months by a local consultant under the technical oversight of the Economic Growth Office.

## The Partner Landscape Journey

The journey will vary slightly depending on whether you are conducting an analysis or adding an assessment. Although both paths include an analysis, the assessment will also require some judgment or expert opinion, usually regarding capacity, of partners identified by the initial analysis.



The remainder of this guide will explain how to conduct each type of partner landscape.

# Conduct an Analysis



## 1 Define desired characteristics of target partners

Determine the landscape of partners you want to identify. For example, will it include local or international organizations, those operating in a particular region or in specific technical areas, or those providing cross-cutting expertise, such as accounting or auditing, research (for monitoring and evaluation support), or training (to support capacity strengthening)?

As you review the characteristics of organizations that should be included (or excluded), consider:



### Organization type

e.g., local, nonprofit, government, university, private sector, cooperative, U.S. small business, public international organization



### Function

e.g., funder, regulator, implementer, service provider



### Approach

e.g., research, advocacy, knowledge dissemination, service provision, incubator



### Technical expertise

e.g., refugee resettlement, HIV/AIDS prevention, air pollution



### Target populations

e.g., diabetes patients, youth, Latinas, those with disabilities



### Geography

e.g., specific districts or country-wide

### Apply Systems Thinking

At a basic level, partner landscapes identify relevant organizations. However, they can provide further value to USAID by illustrating the system(s) to which those organizations contribute. [The 5Rs Framework](#) highlights five key dimensions of systems: results, roles, relationships, rules, and resources. Collectively these five “Rs” can serve as a lens for assessing local systems and a guide for identifying and monitoring interventions designed to strengthen these systems. A partner landscape may study whether organizations have the capacity to effectively fulfill their roles, the degree to which organizations are connected through relationships, or how the rules of their environment facilitate or inhibit their effectiveness.<sup>1</sup>

Finally, think about which aspects of the system you will target with data collection and analysis.

Relationships	Capacity	Resources
How do different actors work with one another?	Do organizations have skills to effectively fulfill their roles?	What barriers do they face in accessing USAID funding?

<sup>1</sup> See “Social Network Analysis” section of the [Local Systems Practice User Guide](#).



## 2 Develop data collection methodology

First, you need to **specify the information to gather** about each organization to meet the previously defined purpose of the partner landscape. This could be geographic focus, organization size, previous experience with USAID, or other details such as those outlined in this [sample organization profile template](#). Target your resources to collect only essential information and use existing data sources whenever possible.



**Tip:** Consider capturing information on the leadership and accountability of the organizations. For example, if an organization's focus is on youth, consider how many of its executive team or board members are themselves youth.

Next, decide on the **methods to collect the information** you need. You may use multiple methods, such as desk research, targeted outreach, a public outreach campaign, and key informant interviews or focus group discussions.



**Tip:** Involve Foreign Service Nationals (FSNs)! They often know best what methods to use, understand feedback culture in their countries, know a range of local actors as well as entities USAID has engaged with in the past (both positively and negatively), and can amplify the research through their networks.

**Desk research:** An internet search can help identify organizations and associations in the target region that may have directories of similar organizations (e.g., national NGO registry, network and association registries). Many countries require companies and not-for-profit entities to register with a ministry, such as a ministry of social development. If available, ministry lists often contain detailed organizational profiles that can help you collect and verify information. Chambers of commerce, universities, and other membership networks often have extensive, publicly available data as well.



**Tip:** Lesser-known organizations, or organizations whose language is not the dominant language of the search engine you are using, will not appear in your early search results. Be aware of search engine bias that may show only results that are popular and already well known.

**Targeted outreach:** Reach out via email to other donors, Mission staff, and implementing partners to tap into their networks.



**Tip:** You may use snowball sampling, a recruitment technique in which research participants are asked to identify other potential subjects. You may also ask other donors to review your list of participants and identify any that may be missing according to your selection criteria.

**Public outreach:** This allows organizations to identify themselves to USAID. Decide on outreach via social media or mainstream media (billboards, newspapers, radio, television). Think carefully about the number of outreach avenues and how long the campaign will run, as this will impact cost for both USAID and participating organizations. If you do outreach through newspapers and radio, organizations will still need a platform (such as the internet) through which to submit their information to USAID. Clearly identify this platform through all messaging.

Ensure the response platform is available in a range of languages and uses simple phrasing, is compliant with [Section 508](#) of the Rehabilitation Act of 1973, and is in an easily accessible location. (Some websites may be blocked in certain countries; youth organizations may prefer filling out a survey on Facebook rather than emailing a questionnaire response.)

Make sure your request is clear: USAID is seeking to understand the landscape of organizations that contribute to X development outcome, the parameters of the search (including any deadlines), where organizations can find more information, and next steps for organizations that meet the search parameters.

- Here is an example of a public outreach campaign conducted in El Salvador on the Google Forms platform: [English](#), [Spanish](#).
- Here is sample public outreach campaign language (in French): [printed ad](#), [newspaper ad](#), [Twitter](#), [Facebook](#).



**Tip:** Outreach campaigns have the potential to raise expectations of organizations. Be clear in your request that USAID is not funding any organizations through this effort.

**Key informant interviews or focus group discussions:** After your desk research or an outreach campaign is complete, you may gather more in-depth knowledge about a select cohort of organizations (see more on this process on page 8). Such a multi-step approach—an initial broad outreach to shortlist high-potential organizations followed by key interviews with a select few to gain further insights—is an effective way to prioritize potential partners.



**Tip:** Although nonprofits will likely understand the value of participating in a partner landscape, it may be more challenging for private-sector organizations to imagine [what partnerships with USAID could look like](#) and [how they can contribute to achieving development or humanitarian objectives](#). You may want to involve your M/OU Private-Sector Engagement Specialist for additional guidance. And remember to share with all potential partners how you plan to use the information gathered with the partner landscape.

### Consider the following when selecting a methodology.



**Internet availability:** Although the internet can be useful in making the public aware of USAID's search and collecting responses, access can be a limiting factor. By using it alone, you may exclude organizations that do not have regular connectivity or the necessary equipment. These potential partners may possess local knowledge critical to localization priorities—and finding ways to reach them can be well worth the effort.



**Language:** Consider carefully what language (including indigenous languages) to use in your outreach (written and verbal). The value to USAID programming of ensuring diversity, equity, and social inclusion among potential partners is often worth the cost of translation. Since partner landscapes are not part of procurement, there is no requirement to conduct any part of the process in English.



**Safety and security:** Review whether there are safety or security concerns that could impact your ability to connect with organizations. Maintain safeguards for the data you collect, especially for Personally Identifying Information. In contexts where organizations may be put at risk for speaking with USAID, consider using third-party consultants to conduct partner landscapes in a way that may protect these organizations.

The final step to developing a data collection methodology is to **create a data management plan** to organize and store the information you gather. You will need a plan to:



Safeguard, and likely anonymize, the data to prevent leaks of sensitive information;



Minimize distortion by performing transcriptions or data entry in a systematic way; and



Prevent loss of data by having an organizational system that is routinely backed up.

### 3 Gather partner data, verifying it meets target requirements

You are now ready to collect your data. This may take from a few days to a few weeks, depending on the methodology you have chosen.

Once you have collected your data, follow these steps to ensure its usefulness.

A

Classify the data into a master table. This will likely require staff to make judgment calls, such as when the work of an organization can be classified under multiple categories.

B

Clean the data to improve its quality. Identify and remove errors and make entries as consistent as possible—correct spelling, remove invalid data, and add missing information.

C

Confirm your data addresses the questions outlined in your purpose statement. If not, collect additional data to fill any gaps.

D

Interpret the data and consider illustrating the findings. Translating the information into a visual context, such as a map or graph, makes it easier to identify patterns, trends, and outliers.

Going back to the earlier USAID/Malawi example, you would now consider whether you have collected the information needed to target a Request for Information to appropriate potential partners.

### 4 Apply analysis to complete findings

Consider how your findings support and inform the goals of your initial purpose statement.

### 5 Reflect and plan next steps

Consider your next actions. Partner landscapes can provide an opportunity to operationalize a co-creation<sup>2</sup> and collaboration philosophy<sup>3</sup>—a good way to engage new partners.

<sup>2</sup> [Co-Creation: An Interactive Guide](#)

<sup>3</sup> [Co-Creation: A Collaboration Methodology](#)

# Conduct an Assessment

Here, the partner landscape will be used to make a **recommendation** regarding which partners are best suited to support a particular M/OU objective. For example, the assessment may identify organizations that are ready to engage with USAID directly as a prime or through other means, such as co-creation of a new Activity.

Note that these steps may in many ways mirror those used to conduct an analysis. Here, we will highlight where there may be additional actions or considerations.

## 1 Define desired characteristics of target partners

Follow the same steps as for an analysis (page 4).

## 2 Define criteria through which partners will be assessed

You will want to develop **prioritization criteria, or a scoring rubric**, with which to assess organizations. These criteria represent the priority characteristics you will collect during interviews and evaluate through your assessment. They might include whether an organization is technically aligned with M/OU priorities, serves vulnerable populations, provides expertise in multiple fields, is legally registered in the country, or has previously received USAID funding.

Once you have established your criteria, create a rating scale and indicators to guide data collectors on how to assign ratings. A good scoring rubric should standardize evaluation in such a way that it can be used by various data collectors, prevents scoring drift, and allows for consistency across time. If you are scoring 100 organizations, such a rubric allows you to judge the 100th organization with the same criteria and outcome as that with which you judged the first organization. Here is an example of a [scoring rubric](#) from USAID/EI Salvador.



**Tip:** You may use existing USAID tools (or portions of them), such as the [Non-U.S. Organization Pre-Award Survey](#) or the [Organizational Capacity Assessment](#), to design your assessment. You may also choose to simplify existing tools for your needs.

## 3 Develop data collection methodology

The guidance here is the same as for a partner landscape analysis (page 5), with additional weight given to a final step: **key informant interviews**.

These interviews are much more powerful than a questionnaire in eliciting narrative data and will allow you to investigate an organization's skills, capacities, and priorities in greater depth. While such interviews are not essential for an analysis, they are critical for an assessment, in which you are offering an expert opinion—making a recommendation—on one or more aspects of an organization.





Your data collection plan may include desk research, targeted outreach, and/or public outreach, plus invitations to high-potential partners to participate in an in-depth self-assessment survey or preliminary interview. Then, you would aggregate data from these surveys or interviews and conduct additional deep-dive interviews with a select few organizations to gain further insights.

Setting up, conducting, and analyzing interviews is time-consuming. Determine how many interviews are needed to gather the information to complete an organization profile template, keeping in mind your timeframe, budget, staff resources, and whether some interviews may be conducted virtually. Also consider how you will use the additional knowledge gained.



**Tip:** Local organizations are assessed regularly—without compensation—by donors and implementing partners. To avoid assessment fatigue, plan to ask only what you really need to know from select organizations. You may also gain the information you need by asking an organization for copies of any recent assessments.

These considerations will help you develop a detailed data collection plan. This [“Partner Landscape Methodology”](#) from USAID/Dominican Republic provides a good template as you write up your plan.

## 4 Gather partner data, verifying it meets target requirements

Now you can go ahead and collect your data according to your collection plan.

**To be transparent and build trust,** be explicit with organizations about the purpose of your data collection. You should also share your methodology and selection criteria, how data will be used, the timeline for participation, and how you will inform people of the results (if applicable). Some information may be sensitive; for example, you will not want to publish a list of organizations that identified as advocating for LGBTQ+ rights during confidential interviews. However, you might share the total number of organizations that responded to a survey, the number you decided to interview, and general characteristics.

Organizations spend time and effort to participate in a partner landscape, often with hopes of partnering with USAID. We need to ensure clear expectations and communications throughout the process.

## 5 Apply assessment to compile results

You will then analyze and synthesize the data to create a final, prioritized list of recommended potential partners. This phase can be surprisingly time intensive, so plan accordingly.

In addition to the scoring rubric you designed earlier, consider a range of methods and tools to help you synthesize the data and make sense of what may have become a long list of organizations or an unwieldy spreadsheet. Additional resources might include:

- ✓ [stakeholder analysis](#);
- ✓ [organizational network analysis](#);
- ✓ sociogram, proximity chart, force field analysis, or persona development.
- ✓ [social impact mapping](#);
- ✓ [salience model](#); or



**Tip:** There may be data not captured in the assessment criteria or scoring rubric that become important. If that is the case, you will need to retrace your steps to collect that data from all respondent groups and re-score everyone.



## 6 Reflect and plan next steps

Consider how your findings help answer the points in your initial partner landscape purpose statement and what you will do next.

Using the earlier USAID/Malawi example, you would now have a prioritized list of local or locally established partners that have the systems in place—or will with capacity-strengthening solutions—to directly receive U.S. Government funds and collaborate with the Mission. If few or no organizations are qualified to receive U.S. Government funds, you may decide to provide the requisite capacity building to select organizations that meet certain criteria you establish.

### Wrap Up

1 Share the partner landscape broadly within the M/OU.

2 Step back and reflect on the partner landscape experience. Consider the following questions as you review the process.

- What part(s) would you change or do differently (and why)?
- What part(s) worked well and would you tell others to replicate (and why)?
- What tools or resources could USAID provide M/OUTs to support partner landscapes?
- What lessons can you share with the New Partnerships Initiative team so it can adapt this guide and other Missions can learn from your experience?

3 Always close the feedback loop.

- Don't forget to send clear communication to each participating organization to thank them for their time and share how the information collected is being used, for what purpose, and according to what criteria.
- Also, keep participating organizations informed about upcoming opportunities that might be of interest:
  - » Industry/Partner Days;
  - » Requests for Information, Concept Notes, Notices of Funding Opportunities, etc.;
  - » Co-creation events; and
  - » Capacity-strengthening opportunities.

The New Partnerships Initiative team in DDI/LFT is available to provide a wide range of technical support for localization and other partnership efforts through virtual or in-person TDYs. Email [NPITechnicalSupport@USAID.gov](mailto:NPITechnicalSupport@USAID.gov) to reach out to the team.

This document is a product of the Partnerships Incubator, a USAID-funded project of Kaizen, a Tetra Tech company. The Incubator works hand-in-hand with USAID to strengthen partner engagement, lower barriers to partner understanding, and improve the capacity of partners to work with USAID—all to multiply the Agency's development impact around the world.