

Remote management programming and donor policy

Izzy Birch

Independent researcher

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Question

What policies and guidance on remote management programming (RMP) do donors make available to their staff and partners? What does the evidence tell us about trends in donor support for RMP?

Summarise in note form what the evidence tells us about the appropriate role of donors in relation to partners and other humanitarian stakeholders and the implications of supporting RMP for donor systems and structures.

Prepare a matrix of agency operational guidance, including that arising from COVID-19, identifying the main themes covered, summarising specifics of the content and highlighting any tools and templates/trainings (using the table provided).

Suggest useful reading on the risks of remote management.

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1. Summary

This rapid literature review finds very little donor-published policy or guidance on remote management programming. However, there has been an expansion in operational guidance produced by other agencies, including in response to the COVID-19 pandemic. It is also difficult to ascertain any donor-specific trends in support for remote programming, other than that it is increasingly the default option for many organisations working in insecure environments, rather than a last resort or temporary measure, and that prolonged crises such as that in Syria are contributing to its normalisation.

'Remote management' in the context of this report refers to the strategies used by humanitarian agencies to maintain access to populations in need in situations of significant uncertainty and risk. They may include the withdrawal of certain categories of staff or the reallocation of responsibilities for programme delivery to local staff or partners (Schreter & Harmer, 2013). Different agencies use different terms for approaches which generally lie along a spectrum of greater or lesser delegation of power and responsibility to the local level (Svoboda et al, 2018).

The literature suggests three broad roles for donors in remote management:

- **A convening role**, for example that brings grantees and implementers together to discuss programming approaches and constraints, or that creates the space for open discussion within the humanitarian community on the way forward for remote management.
- **A coordinating role**, particularly harmonising donor requirements given the demands placed on local actors, as well as coordinating the use of donor-procured services such as third party monitoring.
- **A role in setting standards and guidance**, critically reviewing remote programming practices with humanitarian actors and working towards system-wide standards.

The implications of remote management programming for donor systems and structures are noted in five areas: ethics, funding, engagement with proscribed groups, staffing, and research. The report concludes with a matrix that summarises recent operational guidance and a list of suggested reading on the risks of remote management.

The literature is still largely practitioner-focused (as previously noted by Schreter & Harmer, 2013). It discusses gender from a number of angles, particularly protection, security, and the use of technology. The documents reviewed for this report did not discuss people with disabilities.

2. Donor policies and guidance

There is very little donor-published policy or guidance on remote management programming. In their rigorous review of evidence on humanitarian programming in insecure environments, Schreter & Harmer (2013, p. 55) found only one donor policy on remote management and no evidence of comprehensive mapping of donor policy. Several years later, this report finds that little has changed.

ECHO (2015) remains the exception. It will only consider funding actions implemented through remote management when seven conditions are met. Each condition has specific criteria that the

applicant must meet. The third of these conditions is that remote management must be 'justified by a life-saving imperative, directly and/or indirectly through the preservation of crucial livelihoods' (ECHO, 2015, p. 4).

An evaluation of ECHO's Syria response found that its partners welcomed clear policy guidance on remote management. Some partners reported that ECHO's was the first they had received from a major donor, and that ECHO's statement on remote management was viewed as leading the policy agenda on this issue. Partners interviewed for the evaluation regarded it as a key reference point during project design (ADE / URD, 2016).¹

Several studies speculate as to the reasons for the continued absence of published policy in this area, for example that remote programming is perceived as a measure that is temporary and sub-optimal (Howe et al, 2015; Rivas, 2015). Liability concerns or other sensitivities may also constrain public statement (Stoddard et al, 2010). Others caution that initiatives to improve the effectiveness of remote management, such as guidelines and manuals, may lead agencies to rely more on this modality and retreat still further from direct involvement in conflict-related crises, thus fundamentally changing the nature of humanitarian action (Donini & Maxwell, 2014).

While donor-published material remains limited, a number of agencies have developed operational guidance. Section 6 summarises a selection of this. However, only 38 percent of respondents to a recent global online survey reported that their organisation had guidelines or handbooks on remote programming while more than a third were not sure (Jackson & Zyck, 2017).

Nevertheless, the evidence suggests that gaps remain. Chaudri et al (2017) find that programming in inaccessible conflict areas has largely been governed by 'trial and error due to the lack of comprehensive instruction and detailed strategy' (p. 11). Howe et al (2015) highlight the lack of 'best-practice literature and policies for operating standards' (p. 16). Schreter & Harmer (2013) suggest that analysis of how donors have supported partners in differing high-risk environments could inform a more consistent policy approach among donors and improve their partners' preparedness and planning.

3. Trends in donor support for remote programming

It is hard to ascertain from the literature any donor-specific trends beyond the general trends in remote management. Remote approaches are increasingly the default option for many organisations operating in insecure environments, rather than a last resort or temporary measure (Jackson & Zyck, 2017). Syria has 'normalised' remote management and produced the first generation of 'remote aid workers' ready to use their experience elsewhere (Fradejas-Garcia, 2019).

¹ The same evaluation recommended that ECHO relax the requirement that remote management be limited to life-saving activities.

Remote management has been energised by the COVID-19 pandemic, with additional operational guidance recently published (including War Child Canada & Women's Refugee Commission, 2020; Humanitarian Advisory Group & CARE, 2020).

The humanitarian assistance strategy of the German Federal Government (2019-2023) identifies 'improving humanitarian access' as one of its three priorities, and 'strengthening remote management' as one way to do this, specifically through coordinated donor approaches to risk and the pooling of capabilities in context and risk analysis (GFFO, 2019). KfW is organising a virtual conference in January 2021 on Fragile Contexts, Digitalisation and Remote Management, Monitoring and Verification, and is in the process of developing a manual.²

A brief on SDC's experience concludes that remote monitoring is not the 'new normal' (Rivas, 2015), and that first-hand access and physical presence remain key elements of SDC's approach (Sida & Oakley, 2019).

4. Appropriate role of donors

Convening role

- Bringing grantees and implementers together to discuss programming approaches and constraints (Jackson & Zyck, 2017).
- Working with implementing agencies to find shared solutions to access challenges (Haver & Carter, 2016).
- Openly discussing with implementing agencies the political constraints that shape humanitarian presence (Stoddard & Jillani, 2016).

Coordinating role

- Coordinating and harmonising donor requirements, taking particular account of the demands on local actors (Building Markets, 2018; Howe et al, 2015).
- Supporting risk management coordination initiatives and harmonised tools (Stoddard et al, 2019).
- Coordinating the use of third party monitoring (TPM) and sharing information between donors to improve the selection of providers (Price, 2017).
- Building common understanding with the humanitarian community of due diligence in remote programming (Donini & Maxwell, 2014).

Guiding / standard-setting role

- Helping define what is acceptable practice, particularly in terms of the compromises required to secure access (Steets et al, 2012).

² https://www.kfw-entwicklungsbank.de/International-financing/KfW-Development-Bank/About-us/News/News-Details_608192.html

- Encouraging greater consideration of programme criticality (Haver & Carter, 2016).
- Building consensus around minimum accountability standards for remote programme management (Integrity, 2015).
- Alongside humanitarian actors, critically reviewing remote programming practices and working towards system-wide standards (Jackson & Zyck, 2017).

5. Implications of remote programming for donor systems and structures

Ethics

- **Address risk transfer / duty of care**, for example in contracting processes and expectations of downstream partners (Stoddard et al, 2019; Pavanello et al, 2018; Svoboda et al, 2018; Jackson & Zyck, 2017; Howe et al, 2015).
- **Provide clear guidance on data protection issues**, for example with third-party monitoring (Integrity, 2015).

Funding

- **Increase flexibility to help manage uncertainty**: this may include multi-year funding; the facility to re-allocate funds; more unrestricted funding; core costs for local actors; and direct funding of local actors, including through common pools (Danielsson & Huser, 2018; Majid et al, 2018; ALNAP, 2018; Jackson & Zyck, 2017; Howe et al, 2015).
- **Identify, document, and disseminate examples of direct funding to local actors**, who experience both financial and non-financial benefits from their direct relationships with donors (Majid et al, 2018).
- **Fund security costs and the capacities to manage risk**, particularly among national / local actors (Stoddard et al, 2019; Jackson & Zyck, 2017; IFRC, 2018).

Engagement with proscribed groups

- **Provide clarity for implementing agencies**, encourage grantees to approach with requests for clarification and be ready to provide clear, enabling answers (Svoboda et al, 2018; O’Leary, 2018).
- **Consider dedicated focal points** to ensure clear and official communication (Jackson & Zyck, 2017).

Staffing

- **Provide training for programme managers and advisers** on both remote management and conflict sensitivity (Integrity, 2015).
- **Support staff through decision-making**, particularly since this is likely to be context-specific (Steets et al, 2012).

Research³

- **Remote methods of data collection can create an ‘alternative reality’** if not combined with more detailed and qualitative information; distance changes how people perceive realities on the ground (Jaspars, 2020).
- **Most research on humanitarian access focuses on international organisations.** There is less analysis of local actors as aid providers in their own right, rather than in terms of their relationship with international actors (Svoboda et al, 2018).
- **The procurement and use of localised research in uncertain environments requires a stronger ethical framework.** Ethical guidelines pay insufficient attention to the risks faced by local researchers and the principle of co-authorship. Donors could bring local researchers into strategy sessions for both research design and post-analysis (McKay & De Carbonnel, 2016).

General implications (not specific to donors)

- **Plan for remote management:** it needs simplified processes, contingency funding to accommodate additional costs, training plans, and criteria for entry and exit and transition planning (Rivas, 2015; Kjærum, 2015; Norman, 2012; Stoddard et al, 2010). As well as stand-alone remote management policy and planning, all organisational policies and procedures should be reviewed to ensure that they are functional in remote management contexts (Norman, 2012).
- **Consider the appropriateness of the action under remote management.** Some humanitarian activities may be better suited to remote management than others (Pavanello et al, 2018; Jaspars, 2020). Protection is a particular challenge under this modality because it needs proximity (Svoboda et al, 2018; Jackson & Zyck, 2017; Brown et al, 2014).
- **Capacity works both ways:** the focus of attention in remote management is generally on the capacities of local actors – for example given concerns about accountability, diversion, and the application of humanitarian principles – but an international agency’s capacity to partner with them is as important to success (Howe et al, 2015).
- **Recognise that perceptions differ,** for example:
 - For international NGOs, remote management may be regarded as a departure from best practice, but for local NGOs it can insulate their frontline staff from risk by limiting communication with international agencies (Pavanello et al, 2018).
 - Expatriate actors may regard remote control aid as an example of successful partnership and localisation, while national actors see it as a form of sub-contracting (Van Voorst, 2019). Language is important: donors and international agencies may refer to sub-contractual relationships as ‘partnerships’, while local actors see this usage as confusing and condescending (Howe et al, 2015)

³ These points are not specific to donors, but donors have an opportunity to shape research practice through their funding.

- Remote management is often presented as a 'trap' in which international agencies can become stuck, but the principal fear of local partners is that when security improves, their roles will be downgraded and the experience they have built up will be lost (ADE / URD, 2016).
- **Clarify the relationship between remote management and localisation.** Localisation is about shifting the centre of power in the humanitarian system, while remote management as currently practised tends to involve the retention of decision-making and resources in international actors (Svoboda et al, 2018). Conflating the two risks giving moral legitimacy to what is in effect often simply sub-contracting (Van Voorst, 2019). Remote management mindsets see local actors as risks to be managed, while localisation sees them as assets to be cultivated (Dixon et al, 2016). It is important to distinguish between deliberate local partnering / capacity building and reactive operational modifications, both of which could be regarded as forms of remote management (Howe et al, 2015; Donini & Maxwell, 2014).

6. Matrix of agency operational guidance

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
Humanitarian Advisory Group / CARE (2020). ⁴ <i>Remote humanitarian management and programming: guidance note</i> 12 pages	Co-design projects with partners Discuss distribution of responsibilities and remote support required Discuss how remote management (RM) can support localisation ⁵	Emphasis on flexibility Discuss range of possible scenarios with partners Develop flexible programme plans & agreements Have contingency funds ready to deploy Agree how RM will meet donor due diligence & transparency requirements		Identify RM capacities of all partners, national & international Plan provision of remote capacity strengthening ⁶	Develop context-specific protocols, systems & procedures Ensure systematic information collection on changes in context and a process to feed into decision-making Strengthen partners' communications infrastructure	Joint risk mapping with all parties Discuss streamlining partner activities to reduce exposure Establish risk thresholds & referral pathways Improve diversity / inclusiveness of leadership team ⁷	Explore how collaboration with other implementing partners could reduce risk	Avoid risk transfer as a policy priority	Strengthen partners' protection & accountability to affected populations (AAP) programming
VENRO (2020). <i>Humanitarian assistance from</i>	Distinguishes between projects planned remotely	Trust is critical for successful implementation;			Agree the processes for programme & financial monitoring,	Joint security analysis with partners		Ensure that data collection complies with	

⁴ The same organisations have published two other guidance notes on remote humanitarian facilitation and remote humanitarian monitoring.

⁵ Recommends the Localisation Measurement Framework tool: https://humanitarianadvisorygroup.org/wp-content/uploads/2019/12/Measuring-Localisation-Framework-and-Tools-Final_2019.pdf

⁶ Recommends the resources and tool box provided by the Remote Partnering Project: <https://www.remotepartnering.org/>

⁷ Cites research finding that diverse and inclusive humanitarian leadership teams are nearly five times more likely to be perceived to manage risk well: https://humanitarianadvisorygroup.org/wp-content/uploads/2019/10/HAG_Data-on-diversity_Final-electronic.pdf

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
<i>a distance: recommendation for remote programming</i> 28 pages	<p>from the outset and those which change mid-point</p> <p>Joint analysis & planning with partners & donors⁸</p> <p>Develop guidelines with partners to promote compliance</p> <p>Create emergency plans & guidelines within non-remote projects to activate remote programming if required, and train all staff / partners on these</p> <p>Develop strategies for ending remote programming</p> <p>Anticipate and budget for likely higher costs (e.g. security, training,</p>	<p>the quality of communication (regular, organised, open) can strengthen it</p>			<p>communication & responsibilities, and train staff accordingly</p> <p>Lists digital technologies for project monitoring (p.18); test before using & provide training</p> <p>Discusses potential benefits & risks of third party monitoring</p> <p>Local communities should know about the monitoring organisation and accept the procedures</p> <p>Ensure that third party monitors understand humanitarian principles, organisational</p>	<p>Document SOPs & emergency procedures</p> <p>Provide training for all staff & partners and budget for this⁹</p>		<p>data protection guidelines & protects personal data</p>	

⁸ Recommends Global Interagency Security Forum risk management toolkit: <https://gisf.ngo/resource/security-to-go/>

⁹ Lists international networks for security issues & free online security trainings (p. 7).

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	third party monitoring (TPM))				guidelines, project content Contains flow chart for joint planning & implementation of evaluations (p. 20)				
War Child Canada / Women's Refugee Commission, 2020. <i>Guidance on establishing remote monitoring and management of GBV programming in the context of the COVID-19 pandemic.</i> 13 pages [focuses on monitoring]					Existing community structures (WASH / parent-teacher committees) can monitor activities that target communities. However, only trained & accredited individuals should manage cases of GBV or collect data from survivors Develop a clear framework detailing monitoring, reporting & communication modalities & frequencies and add to M&E plan			Establish data protection plan for mobile data collection devices ¹⁰ Address ethical issues in training of staff & community focal points Maintain safety & confidentiality of survivors in monitoring	

¹⁰ References ICRC's Handbook on Data Protection in Humanitarian Action: <https://www.icrc.org/en/data-protection-humanitarian-action-handbook>

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
					Integrate qualitative methods in data collection Lists best practices for establishing community focal points Provides detail on mobile data collection, platforms, and data security				
WHO, 2018. ¹¹ <i>Programming in access-constrained environments: practical guidance</i> 172 pages	Distinguishes between reactive, proactive, and adaptive decision to use RM Decision to start / stop RM should be linked to specific triggers; ¹² exit should be as carefully planned as entry, with a handover exit strategy where relevant	Management strategy should consider scale & complexity of programme, its cost, and adherence to standards Document changes to staff responsibilities Review SOPs and agree with all parties		Develop a detailed capacity building plan, linked to the risk analysis Training needs & challenges are likely to be higher under RM; training modes may need to shift as context changes	Develop a detailed M&E plan prior to implementation (describes this): consider (i) how to ensure monitoring of effectiveness, efficiency & quality; (ii) capacity of operating agent(s); (iii) acceptability to donors M&E is likely to be more intensive, with	Suggests several strategies for mitigating risks to local actors (p. 114)	Develop a structure to exchange information within the cluster (describes examples of information to share and coordination challenges) Strategic coordination is an important resource for	Avoid risk transfer as a significant policy priority	

¹¹ Also contains diagrams explaining the organisational accountability framework, and a lengthy concluding annex that lists challenges relevant to most areas of this table along with solutions and tools.

¹² Recommends the checklist of indicators of safer access produced by NGO Coordination Committee in Iraq: <https://www.alnap.org/help-library/operational-modalities-in-iraq>

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	Lists steps to increase acceptance Sets out five minimum requirements for remote operation, ¹³ with guidance on assessing each one (e.g. criteria to determine programme criticality, ¹⁴ resources for security risk assessment, and pros / cons of communication methods) Emphasises comprehensive risk assessment (operational, programmatic, organisational, including risks to	Suggests measures to mitigate risk of diversion of medical supplies Building trust & good communication is essential for staff retention & partner management; lists measures that either build or lose trust under RM Identifies three issues in remote partner management: (i) clear division of roles & responsibilities; (ii) training; and (iii) measures that enhance sustainability of		Take care not to devalue trained field staff when exiting RM	implications for budget & time Combine internal monitoring & external verification (TPM, peer monitoring, or community monitoring) Suggests accreditation system for national monitors / evaluators to assist in identification Ensure contingency plan / formal mechanism is in place to review the timeframe of RM against indicators Ensure adherence to AAP commitments: independent beneficiary accountability		risk management		

¹³ (i) The programme is critical; (ii) The security risk is acceptable; (iii) Access is sufficient to deliver aid, and for beneficiaries to access programming; (iv) International and domestic legal requirements can be met; (v) The infrastructure in the area of need is sufficient to allow communication between a remote agency and an operating agent.

¹⁴ Recommends the UN framework: <https://www.unsystem.org/CEBPublicFiles/Programme%20Criticality%20Framework%20FINAL%20HLCM%2025102016.pdf>

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	beneficiaries) as a continuous process, with discussion of risks & mitigating measures in each area Guidance on selecting operating agents ¹⁵	partner relationships Partner focal points in agencies have proved useful			mechanisms are especially important in RM Ensure constant communication with donors to manage expectations and meet requirements Discusses risk of technology in remote operations Annexes contain software & data collection tools ¹⁶				
Oxfam, 2017. ¹⁷ <i>Limited access humanitarian programming: operational guidance for managing</i>	Describes a four-step risk assessment framework Discusses three modes of assessment: (i) in-person; (ii) remote;	Provides suggestions for mitigation measures of likely risks, e.g.: (i) discuss constraints to providing original		Assess staff capacity for new skills required by the changed context (including interpersonal	Evaluate all methods for their potential to increase risk Secure formal donor approval for adapted monitoring approaches	Ensure that partners have adequate security management protocols in place	Support partners to establish local coordination mechanisms, if safe to do so Establish secure	Contains guidance on responsible data management and on selection of digital tools ¹⁹	Reduced access may increase the risk of abuse

¹⁵ Recommends a number of tools for partner selection & vetting (p. 59).

¹⁶ Recommends Tearfund (Norman, 2012) checklist for remote monitoring: https://www.elrha.org/wp-content/uploads/2015/01/Remote20Monitoring20and20Accountability20Practice20_web2028229.pdf, and SAVE toolkit of technologies for monitoring in insecure environments: https://www.gppi.net/media/SAVE__2016__Toolkit_on_Technologies_for_Monitoring_in_Insecure_Environments.pdf

¹⁷ This document is structured around the nine commitments of the Core Humanitarian Standard and has a specific focus on programme quality, which makes it more challenging to align with the format of this table.

¹⁹ Also refers to Oxfam's mobile survey toolkit: <https://policy-practice.oxfam.org.uk/publications/mobile-survey-toolkit-617456>, the NOMAD online assessment tool: <https://humanitarian-nomad.org/>, and the SAVE toolkit (mentioned in footnote 15 above).

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
<i>programme quality</i> 48 pages	<p>and (iii) secondary data</p> <p>Provides conflict assessment checklist for project cycle¹⁸</p> <p>Suggests questions to explore during partner assessment</p> <p>Conduct similar checks on sub-contractors where possible</p> <p>Carry out feasibility study for the use of digital technology</p> <p>Check that programme design is realistic, i.e. within the capacity of implementers and feasible</p> <p>Enhance flexibility by planning for a range of</p>	<p>documents with donors prior to signing contract;</p> <p>(ii) photograph supporting documents; (iii) create codes to identify vendors & beneficiaries, retaining full data on remote database; (iv) document all departures from procedures; (v) transfer regular but smaller amounts of cash; (vi) pay attention to clarity of communication</p> <p>Revise / clarify roles, reporting lines, & levels of delegation</p> <p>Identify focal points / partnership officers</p>		<p>& facilitation (rather than 'doing') skills for those now working remotely) and translate into a capacity building action plan</p> <p>Simplify guidelines & formats</p> <p>Use a pilot approach with new partners: limited scope & smaller response, gradually expanding as capacity & trust increase</p>	<p>Monitor the potential negative effects of the response</p> <p>Triangulate information, and only collect what can be acted on</p> <p>Aim for a combination of at least two types of monitor (e.g. implementers, peers, third party, community where safe to do so)</p> <p>Co-design monitoring systems with those doing the monitoring</p> <p>Budget appropriately (remote monitoring is likely to be more costly)</p> <p>Review complaints with a conflict-sensitive lens</p>	<p>Recognise that job security & economic need can motivate field workers to downplay risks</p> <p>Take evidence-based decisions about gender and risk: for example, women may be more or less secure in different settings</p>	<p>mechanisms to share information between peer agencies</p> <p>Develop collective means of partner identification</p> <p>Define common standards for procurement & business support procedures</p> <p>Share capacity building initiatives</p> <p>Develop unified messages to donors on operational constraints</p>	<p>Establish robust data protection mechanisms</p> <p>Failure to protect complaints data could endanger communities & partners</p> <p>Ensure that GBV actions address ethical & safety concerns, e.g. skilled female interviewers, availability of referral services</p>	

¹⁸ The checklist is drawn from the following document: <https://odihpn.org/wp-content/uploads/2011/12/networkpaper070.pdf>

	Programme design (needs assessment, consultation with communities, etc)	Programme management, including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	implementation approaches								
Oxfam, nd. <i>Guidelines for monitoring and evaluation in limited access humanitarian programmes</i> 12 pages					Defines minimum standards for information collection covering financial, HR, use of resources, technical standards, & beneficiary satisfaction Summarises key points to note & lessons learned	Security of partners & community is paramount Apply 'Do No Harm' principle			
IRC, 2016. ²⁰ <i>Remote management guidelines, Syria</i> 17 pages	Careful selection of programmes for remote management (considering level of need, sensitivity, technical complexity) Pre-set needs assessment tools on staff mobiles	Contextualised SOPs & control manuals for finance, supply chain, & HR Emphasis on staff orientation, compliance, systematic performance reviews, and plans for learning & development	Work within agreed protocols & red lines for Syria operations Active acceptance strategy: (i) employs humanitarian access staff; (ii) ensures programme	Invests in capacity of Syrian staff to take on managerial duties IRC global portal for online capacity building available to all staff	Employs Research and Monitoring Assistants who are independent from all other teams & from partners and collect data using mobile platforms Uses Commodity Tracking System (QR codes) Humanitarian access staff are	Duty of care: security strategies & procedures are regularly updated and reinforced through communication & orientation 'Right to Withdraw' policy	Works through IASC cluster system		Programmatic Complaint Management Field Guide sets minimum standards

²⁰ IRC has Global Remote Management Guidelines (with which these Syria guidelines are consistent) but these were not available for this review.

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	<p>Security & programme staff collaborate during design phase</p> <p>Due diligence requirements in partner selection are not changed by remote management, only the means of obtaining information; important to allow sufficient time; IRC is developing toolkit</p> <p>Pre-award meetings with partners to introduce policies & procedures and discuss contractual obligations</p>	<p>Modifications to recruitment & procurement procedures given low visibility guidelines</p> <p><i>Hawala</i> agents engaged on reimbursement basis</p> <p>Limits placed on value of funds kept on site / just-in-time financial transfers for distributions</p> <p>Triangulation of data on prices (e.g. from Research & Monitoring Assistants, supply chain staff, partners, other networks)</p>	<p>quality; (iii) provides information to communities to build trust</p>	<p>Measures to enhance retention of national staff</p>	<p>used to corroborate other data sources and address issues that may affect acceptance</p> <p>Coordinate site visits by TPMs when contracted by donors</p> <p>Support monitoring frameworks & activities of partners</p>	<p>for all staff & partners</p> <p>Supports security management strategies of partners</p> <p>Applies four criteria when balancing programme criticality & risk²¹</p>			

²¹ (i) Would the consequences of not implementing the programme be so serious that the IRC is prepared to accept a High to Very High risk to staff lives? (ii) Has everything possible been done to find alternative methods of achieving the programme objectives? (iii) Has every possible prevention measure including the transfer of resources been applied to minimize the value risk so as to reduce the current risk level to Medium or lower? (iv) Is there an adequate system to manage the residual risk in order to ensure that it does not increase beyond the current level?

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Remote Cash Project, 2016 (updated 2020). ²² <i>Cash transfers in remote emergency programming</i> 36 pages	Conflict-sensitive context analysis, updated regularly, should inform protection-related measures at all stages of the project cycle ²³ Find alternative ways of assessing partner capacity if needed – for example, exploring conceptions of ‘fairness’ or degree of openness to improving services if no organisations have gender & protection approaches	Clarify roles, expectations, decision-making processes Discusses due diligence on potential partners & suppliers and compliance with counter-terrorism policy ²⁴ Segregate duties within project processes to mitigate risk of fraud Prioritise anti-corruption & conflict-sensitivity principles in procurement selection		Strong social skills (negotiation, conflict resolution) may be more important than technical skills in some RM contexts Remote managers also need different skills (capacity building, office-based routine) The ability to recognise when standard procedures are not	Triangulate sources of information Select technologies based on need, infrastructure, user experience & cultural acceptance, not managers’ enthusiasm	Job security & income may lead remote staff & partners to underplay constraints: avoiding this should be a priority Carry out joint security risk assessments with partners; make safety part of regular dialogue; provide resources for security & first aid training; and investigate	Coordinated responses can help address challenges of remote programming Harmonise alternative procedures with other agencies	Ensure data protection. ²⁵ A data flow mapping exercise can help identify vulnerabilities	Train staff & partners on protection issues, especially with regard to gender, age, and people with particular vulnerabilities ²⁶

²² The points included in this row are a selection of the general statements from the guidelines, which otherwise focus on the technicalities of cash transfers.

²³ Recommends the Conflict Sensitivity Consortium’s ‘How to guide to conflict sensitivity’: https://conflictsensitivity.org/wp-content/uploads/2015/04/6602_HowToGuide_CSF_WEB_3.pdf

²⁴ Recommends NRC’s toolkit: https://www.nrc.no/globalassets/pdf/reports/toolkit/nrc_risk_management_toolkit_principled_humanitarian_action2020.pdf

²⁵ Recommends CALP publication on protecting beneficiary privacy: <https://www.calpnetwork.org/publication/protecting-beneficiary-privacy-principles-and-operational-standards-for-the-secure-use-of-personal-data-in-cash-and-e-transfer-programmes/>

²⁶ Recommends Save the Children’s guidance on child safeguarding for cash and voucher assistance: <https://resourcecentre.savethechildren.net/library/child-safeguarding-cash-and-voucher-assistance-guidance>

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	already mainstreamed	Consider context-specific constraints when reviewing procedures, such as partners without sufficient senior staff to ensure segregation of duties, or suppliers requiring full confidentiality		feasible and to defer them in an approved & accountable way while ensuring compliance is a key organisational competence in RM. Invest in team-building		insurance cover for partners' staff			
UNICEF, 2012. ²⁷ <i>Remote programming in humanitarian action</i> 34 pages	Indicates at what level in the organisation the decision to operate remotely is taken Sets out five steps towards taking decision about RM, all of which should be documented ²⁸	Clarity & accountability in contracting modalities are even more important under RM Partner availability may be limited: single sourcing may be required more often		Essential that staff & partners understand humanitarian principles & communicate humanitarian intent of remote programming to all parties	Contains annex with pros & cons of different remote monitoring methods Evaluations of RM programming should make consideration for: (i) evaluation standards, given data & access challenges; (ii) critical issues that may only arise in	Clarifies that UNICEF is not responsible for partner security management and that this should be made clear. However, UNICEF works with partners to understand risks & mitigate these where possible			

²⁷ Contains checklist in annex which summarises the issues and actions relevant to each section of the guidance.

²⁸ These five are: (i) determination of maximum acceptable residual risk through security risk assessments & programme criticality reviews; (ii) political, conflict & stakeholder analysis; (iii) cost analysis of options; (iv) mapping of non-security risks of remote programming (guidance contains detailed annex on this); (v) development of exit strategy.

	Programme design (needs assessment, consultation with communities, etc)	Programme management , including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	Partner assessments must be conflict-sensitive	Partnership management is even more important under RM ²⁹			evaluation due to weaker monitoring; (iii) costs, which should be planned during design	(discussed in Annex 8)			
ACF, 2011. <i>Remote approach programming: guidelines for implementing a remote approach</i> 14 pages	Preparation for remote approach is triggered by the area's security code (five categories) Ensure that prerequisites for operating remotely are met ³⁰ Carry out risk analysis & prepare costed mitigation action plan (annex details various likely risks and mitigation measures) Indicates at what level in the organisation the decision to								

²⁹ Contains annex with guidance on the selection and vetting process, and analysis of the pros / cons of different partner options.

³⁰ These prerequisites are also outlined in ACF's policy on remote approach, 2011: http://www.missions-acf.org/kitlog/EN/4.Log_&_Programs/4.1.Remote_Management/ACF_FR.Remote_Approach_Policy_2011.pdf

	Programme design (needs assessment, consultation with communities, etc)	Programme management, including financial & supply chain management	Advocacy – humanitarian access, duty of care, etc	Capacity building	Monitoring and evaluation	Safety and security risk	Coordination	Ethics, including data	Safeguarding
	operate remotely is taken								

7. Suggested reading on the risks of remote management

Stoddard et al (2019). 'NGOs and risk: Managing uncertainty in local-international partnerships.' This report examines how risk is perceived and managed in partnerships between international and national NGOs working in situations of limited access and high risk.³¹ Its entry point is the management of risk in such situations, rather than the risk of remote management, although it finds that as risks are passed down the chain from donor to international NGO to local partners, they create tensions and perverse outcomes that lead to inefficiencies and obstacles in the provision of aid.

The study explores seven risk areas: security, fiduciary, legal/compliance, operational, information, reputational, and ethical. It concludes that there is a heavy emphasis on fiduciary risk and compliance, and less policy and management attention being given to security, informational, and reputational risks. The risk of safeguarding failures is yet to be fully incorporated into risk management partnership frameworks. Partnership risk management is thus concerned primarily with the risks that local partners present to international organisations, as opposed to the risks they or others face.

The study also found examples of good practice and promising developments. The recommendations made to donors concern issues of risk transfer / risk sharing, capacity building, security risk management, and coordination.

Créac'h & Leidecker (2018). 'Remote management: Meeting operational challenges.' This short paper summarises the experience of The Operations Partnership in support of the Global Health Cluster. It finds that risk assessment is still insufficiently systematic, leading to a lack of consistency in decision-making processes. It also finds that organisations pay insufficient attention to the adjustments in design and deliverables that are necessary to make programmes feasible under remote management. The paper offers a framework to guide the remote management process, as well as a five-point matrix that translates subjective descriptions of common risks into quantitative measures.

Jackson & Zyck (2017). 'Presence and proximity: To stay and deliver, five years on.' Remote approaches are helping humanitarian workers maintain presence but are also generating significant risks. While the mechanics of remote programming have improved, there has been less attention given to more fundamental questions, such as when remote approaches should be adopted and how that can be done without an unacceptable level of risk transfer. The report finds that humanitarian workers see remote approaches as significantly less effective than direct programming and that they limit attention to certain needs, particularly protection.

Duffield (2016). 'The resilience of the ruins: Towards a critique of digital humanitarianism.' This article provides a critique of the rapid uptake of information technologies in humanitarian disaster management and of the withdrawal of face-to-face engagement in favour of remote

³¹ This follows an earlier study into how international actors manage uncertainty (Stoddard et al, 2016).

approaches, and asks whether connectivity is helping reproduce inequality and external control.³²

Donini & Maxwell (2014). 'From face-to-face to face-to-screen: Remote management, effectiveness and accountability of humanitarian action in insecure environments.' This paper identifies a number of risks associated with remote management and the strategies that might mitigate them. It emphasises the importance of the principle of due diligence in decisions about humanitarian management, and of developing a common understanding of its application in remote programming across the humanitarian community. It concludes by cautioning that the normalisation of remote management and distance technologies carries potentially huge risks for the very nature of the humanitarian endeavour which is built on presence, empathy, and solidarity.

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³² See also: <https://www.thenewhumanitarian.org/opinion/2019/01/07/humanitarianism-crisis-digital-innovation-won-t-fix-it>

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