

Oxfam Management response to the review of *Policy Influence in Scotland: Evaluation of Beyond the Horizon* (Effectiveness Review Series 2013/14)

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1. The context and background of the review

As part of Oxfam Great Britain's (OGB) Global Performance Framework (GPF), samples of mature projects are randomly selected each year and their effectiveness rigorously assessed. The Beyond the Horizon Project, incorporating the Whose Economy? Seminars, the Oxfam Humankind Index and the Our Economy Report, was selected for review in this way under the policy influence thematic area.

Oxfam works to tackle poverty in Scotland in three main ways:

- Developing projects with people living in poverty to improve their lives and show how things can change;
- Raising public awareness of poverty to create pressure for change; and
- Working with policy makers to tackle the causes of poverty.

Since 2011, a key area of activity has been the Beyond the Horizon Project. Oxfam recognises that the prevailing model of the economy is not working to eliminate poverty so it developed two key documents (the Oxfam Humankind Index and the Our Economy Report) with the key aim of influencing how the economy of Scotland develops to respond to the needs of the many, not the few.

On the basis of the theory of change model, four Outcomes (detailed in the summary main findings) were identified to be the focus of this assessment. The four Outcomes were selected on the basis that they covered the scale and scope of impact that Oxfam Scotland aimed to achieve, including:

- Stimulating a debate and informing policy and new ways of delivering; and
- Influencing a range of stakeholders to consider alternative actions and aligning their own views closer to that of Oxfam Scotland as set out in the Humankind Index and in the Our Economy Report.

2. Summary main findings and recommendations

Outcome	Rating	Short Commentary
Outcome 1 - A debate is commenced around alternative performance measures to GDP that better reflect the full spectrum of society, including the flourishing of the poorest in Scottish society, in terms of the social, environmental, as well as economic well-being.	5	The evidence is that the HKI was the catalyst for the current debate about alternative performance measures to GDP. The activity of external partners has influenced the scope and pace of the debate about alternative performance measures to GDP but much of this has been achieved using HKI as evidence to the cause.
Outcome 2 - The National Performance Framework is reconsidered in terms of its Purpose Targets included that more fully address the socio-economic and environmental situations of those in poverty in order to provide 'a broader assessment of national wellbeing and success'.	3	The current Scotland Performs round table discussions and commitment to public consultations are evidence that the National Performance Framework is being reconsidered. The current Amber rating may evolve into green once there is more confidence of this translating into changes to the NPF which provide a broader assessment of national wellbeing and success. Whilst Oxfam Scotland, through the HKI, was a catalyst to bring forward the discussion it is evident that a wide range of partners have been important in supporting the distance travelled relating to Outcome 2. Nevertheless, in terms of its influence, we regard Oxfam via the HKI as being critical.
Outcome 3 - The Scottish government consider an alternative economic approach based on community-led economies which focus on the quality and distribution of growth. This includes specifically influencing the Economy Committee, the Minister for Finance and regeneration actors, as well as creating tolerant attitude towards the creation of a Poverty Commissioner.	2	In terms of directly influencing the transition to an alternative economic model there is limited direct evidence that HKI or Our Economy has achieved this. Our direct consultation revealed limited awareness of the content of Our Economy, namely: <ul style="list-style-type: none"> • Poverty Commissioner • Decent work, including the living wage • Community involvement in decision making • Sustainable Livelihoods Approach
Outcome 4 - Anti-poverty organisations reframe their agenda by placing the economy as a central issue/topic that needs to be addressed and acts upon this through campaigning/ advocacy.	3	Evidence exists to demonstrate that a range of key anti-poverty organisations have reframed their agenda by placing the economy as a central issue within their organisation.

Scoring key: Specific contribution of intervention

5	Outcome realised in full Evidence that intervention made a crucial contribution
4	Outcome realised in part & evidence that intervention made a crucial contribution Outcome realised in full & evidence that intervention made an important contribution
3	Outcome realised in part & evidence that intervention made an important contribution
2	Outcome realised in part & evidence that intervention made some contribution Outcome realised to a small degree & evidence that intervention made an important contribution
1	Outcome realised, to any degree, but no evidence that the intervention made any contribution

Recommendations:

Continue to pursue the following:

- Changes to the National Performance Framework (NPF) that are sympathetic to the case Oxfam has been making. Beyond the Horizon project has had considerable impact in stimulating a debate on the future of the NPF. It has also done a great deal to promote a greater appreciation of the need for economic growth to be pursued with an understanding of the needs of all communities, especially those living in poverty and what success/improved quality of life might mean for them.
- Maintain the momentum of activity around outcome 3
- Fulfil the potential of Our Economy to achieve further traction. This however will require further investment and allocation of appropriate resources. This will be a challenge in the context of future resource constraints and changes within the organisation. On the basis of the consultation undertaken, the HKI was regarded as having a greater direct influencing impact than Our Economy.

Continue to build on position of Oxfam as authoritative organization in the poverty field and across wider economic issue:

- Since the publication of the Our Economy and HKI the perception of Oxfam Scotland as a key voice on the economy has changed significantly. The project has fundamentally shifted perceptions of Oxfam from a purely internationally focused organisation to one with a valuable contribution to make on domestic issues too. This shift has benefited Oxfam Scotland in terms of its standing amongst policy leads, MSPs, civil society organisations and other bodies with a role in anti-poverty and the economy. Oxfam is now regarded as an authoritative organisation in the poverty field, and increasingly so across wider economic issues – a position it can build on.

Consider the impact of reduced resources and organisational restructure will have on the ability to sustain level of influence and maintain credibility:

- There is a perception, both internally and externally that Oxfam Scotland has lost momentum with a transition/reduction of staffing and a period of uncertainty regarding future organisational structure and advocacy priorities. Clearly, if Oxfam is to sustain this level of influence, there will be a need for adequate resourcing. This may be challenging given policy capacity in Scotland will

diminish from March 2015 following a recent restructure of the organisation. There is a danger that just at the point where Oxfam can have significant influence – and having built up considerable credibility – a reduction in resources may limit what can be achieved.

3. Overall do the findings of the review concur with you own expectations or assessment of the project's effectiveness?

We generally agree with the findings of the review. Fundamentally, the publication of the Our Economy and HKI reports have indeed positioned Oxfam Scotland “as a key voice on the economy...with a valuable contribution to make on domestic issues” – this is undoubtedly the major success of these outputs as well as the work undertaken to promote them.

We would suggest Outcome 2 should have received a rating of 4 rather than 3. As the commentary states: ‘in terms of its influence, we regard Oxfam via the HKI as being critical’. This seems closer to ‘evidence that intervention made a crucial contribution’ (4 in scoring key) than ‘evidence that intervention made an important contribution’ (3 in scoring key).

On Outcome 3, it is worth noting that poverty and inequality – as well as policy objectives within Our Economy relating to the structural causes (e.g. low wages) – were prominent in the debate surrounding the independence referendum. This included a cross party high level hustings hosted by Oxfam Scotland.

In addition, there is anecdotal evidence to suggest increasing progress on Outcome 4 with other anti-poverty organisations increasingly focusing on the economy, including a major conference held in Glasgow recently called “Reinventing Our Economy”, which attracted a large audience.

4. Did the review identify areas that were particularly strong in the project?

The Humankind Index has emerged very strongly as a successful output that helped stimulate debate in Scotland around alternative measures of success to GDP. This matches our own view. The Index has helped Oxfam Scotland develop a credible reputation within policy and advocacy circles. The participative nature of the Humankind Index, including the focus on reaching seldom heard voices, was essential in establishing this credibility.

More widely, there is also growing evidence that other groups, particularly within the third sector, are focussing on the nature of the economy to an increasing degree and, in doing so, are using similar messaging to Oxfam. There is an increasing recognition that ‘business-as-usual’ style policies, as measured narrowly by economic growth (GDP), are insufficient.

In addition, Oxfam Scotland is regularly asked to speak on these matters at conferences and events. We have a credible reputation with the Scottish Government and use this to promote the HKI and Our Economy agendas.

5. Did the review identify areas that were particularly weak in the project?

The review concludes that Our Economy does not seem to have comparable brand recognition as the Humankind Index and that our calls for a Poverty Commissioner were not particularly recognised. The latter point is not surprising as we have not done significant policy or advocacy work on this specific ask to date. In addition, and as recognised in the report, the Our Economy report's purpose was to challenge the structural flaws within the current economic model, rather than focus on the "quickest wins".

While the Our Economy report may not have the same brand recognition as the Humankind Index, we do use many of its recommendations in our day to day lobbying. The comprehensive scope of the report provides an essential underpinning to our work. In most cases we have not used the term "Our Economy", but it is clear that individual policies – such as the living wage – are gaining greater policy traction.

We continue to use various aspects of the Our Economy Report within our advocacy – most recently, for example, in our work on the Community Empowerment Bill and in our response to the Lord Smith of Kelvin Commission on further devolution of powers to Scotland. As such, it remains a critical element of Oxfam Scotland's advocacy work, and will remain so.

It is also encouraging to note in relation to Outcome 3, that some of Oxfam Scotland's domestic partner organisations – specifically those promoting the community-led approach to economic development highlighted within the Our Economy report – have recently attracted Development Worker funding from an agency funded by the Scottish Government. While a causal link is difficult to establish, it is also important to recognise the interplay between Oxfam's advocacy and programme work.

We would also note that while other organisations may not report being aware of the Our Economy report/brand specifically, many of its recommendations are being picked up and actively used. This can be seen, for example with: the concept of a shorter working week being advocated for by the Jimmy Reid Foundation and the influential Commonweal; participatory budgeting being advocated for by the sector-wide Scottish Council for Voluntary Organisations and a range of other third sector groups; and pay ratios being explored by the Scottish Trades Union Congress. Of course, Oxfam was not necessarily responsible for these policies attracting greater attention – however, it is encouraging that the policies contained within Our Economy are being championed by other organisations, as well as by Oxfam. As such, the policy framework contained within Our Economy remains timely, and relevant.

6. Summary of review quality assessment

Aside from changes in personnel within the independent review team, we generally worked well with the review team undertaking the project. While most of the report seems to have a good understanding of the issues, as an independent team coming to these issues afresh, there are some areas, for example in the Review Team's initial understanding of our involvement in the work of the Scottish Government's National Performance Framework roundtable, where we feel understanding could have been stronger.

In addition we would note that there was no media analysis undertaken and only a partial discourse analysis. This is significant as it means the main method used to assess Oxfam's contribution to the specified outcomes was confined to interviews with individuals/organisations. While this aspect was fairly comprehensive in its delivery, it could be argued it is a limited methodology given organisation representatives are likely to have bias (i.e. downplay the contribution of third parties in the development of their own policy and strategy). Augmenting this source of information with media analysis and a more thorough (and longitudinal) discourse analysis would have triangulated results and generated a more comprehensive analysis.

7. Main Oxfam follow-up actions

Oxfam GB has recently launched a new global inequality campaign, as such continued work on the Humankind Index and Our Economy will be undertaken within this context. Specifically, we will use both advocacy products as the basis for our campaigning around the nature of the Scottish and UK economies, and will embed them within our advocacy work in the build up to the 2016 Scottish Elections. This will, of course, take place within the context of evolving UK-wide advocacy objectives.

8. Any conclusions/recommendations Oxfam does not agree with or will not act upon

None

9. What learning from the review will you apply to relevant or new projects in the future? How can the regional centre/Oxford support these plans?

The Humankind Index gained its legitimacy and reputation from its participative focus. Where possible, and subject to resourcing, we will seek to build this into future research/policy projects.

In relation to Our Economy, it is important to recognise the additional capacity pressures created by increasing demand for Oxfam to comment on, and input to, domestic economic agendas. Whilst this is recognised as a key success of these advocacy outputs, this needs to be balanced against international advocacy agendas and consideration given to how these are appropriately resourced.

It is also worth noting that learning from Beyond the Horizons project has informed the work of the Global Research adviser with Oxfam in South Africa, India and Brazil. This very welcome development has happened due to staff changes, but could have been a more central element to the design of the project.

10. Additional reflections

The development of the Humankind Index and Our Economy are excellent examples of Oxfam's ability to develop advocacy which reflects the devolved nature of UK politics. Given the upcoming further devolution of powers to Scotland, it will become increasingly important for Oxfam to respond to this changing context within our advocacy output.

As the report makes clear, the ability of the team in Scotland to pursue a tailored advocacy agenda of this type depends on sustained capacity. The recent restructure of Oxfam's domestic work has proved disruptive; however, the policy capacity mentioned above will now be retained beyond this financial year. While Oxfam Scotland's focus is informed by shifting UK-wide policy priorities, the retention of this advocacy post will significantly boost Oxfam's ability to build on this project in Scotland.