



Rumi (23) does everything in her power to ensure that her daughter can receive a quality education and live a good life. Photo: Vincent Best

# EVALUATION OF THE OXFAM STRATEGIC PLAN 2013–2019

Where Oxfam Is Adding Value (Or Not)

# ACKNOWLEDGMENTS

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Governance and Citizenship knowledge hub

Extractive Industries knowledge hub

VAWG/GBV knowledge hub

Resilience knowledge hub

Education Community of Influence and Practice

Transformative Leadership for women's rights group

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## ACRONYMS USED IN THIS REPORT

ACCRA	Africa Climate Change Resilience Alliance
AMAL	Supporting Women's Leadership in the MENA Region during Changing Times
ANCEFA	Education for All campaign in Africa
ASEAN	Association of Southeast Asian Nations
CA-MEL	Central America-Melanesia Resilience Building Program
CBO	Community-Based Organization
CSO	Civil Society Organization
CSP	Coalitions Support Program
ECLAC	UN Regional Economic Commission in Latin America
EI	Extractive Industries
eVAWG	Ending Violence against Women and Girls
G&C	Governance and Citizenship
GBV	Gender-Based Violence
GRAISEA	Gender Transformative and Responsible Agribusiness Investments in South East Asia
GRB	Gender-Responsive Budgeting
ICT4D	Information and Communications Technologies for Development
IMF	International Monetary Fund
KAP	Knowledge Attitudes Practice
KH	Knowledge Hub
KIT	Knowledge for Impact Team
LAC	Latin America and the Caribbean
LEAF	Local Engagement Assessment Framework
LGBTI	Lesbian, Gay, Bisexual, Transgender, Intersex
MEAL	Monitoring, Evaluation, Accountability, Learning
MEL	Monitoring, Evaluation, Learning
MENA	Middle East and North Africa
OPTI	Occupied Palestinian Territory and Israel
OSP	Oxfam Strategic Plan
PBA	Partnership Brokers Association
R4	Rural Resilience Initiative
REE-CALL	Resilience through Economic Empowerment, Climate Adaptation, Leadership & Learning
RTR	Real-Time Reviews
SfC	Saving for Change
TLWR	Transformative Leadership for Women's Rights
WEE	Women's Economic Empowerment
WIN	World-wide Influencing Network
WRO	Women's Rights Organization

# INTRODUCTION TO EVALUATION OF THE OXFAM STRATEGIC PLAN 2013–2019

As the Oxfam confederation develops its new strategic plan, it draws on two bodies of information. The first is research into trends in the world outside Oxfam. The second is analysis of what the organization knows about its own work over the strategic plan period now ending.

## ***Evaluation of the Oxfam Strategic Plan 2013–2019: Where Oxfam Is Adding Value (Or Not)***

(*Evaluation OSP* for short), the title of this report, contributes to the latter body of information. As will be discussed in the timeline below, Evaluation OSP encompassed two distinct phases. Each is linked to a set of findings published in this report:

Phase I	Review of value-add by Oxfam change goals	Chapter I
Phase II	Review of value-add by Oxfam approaches across change goals	Chapter II

Results of Evaluation OSP as a whole, about change goals (Phase I) and the approaches Oxfam used to achieve outcomes (Phase II), will help the organization respond to its accountability commitments, support program management decision-making, learn to improve its program work, and inform the development of Oxfam’s new strategic plan.

## **The objectives of Evaluation OSP**

Evaluation OSP built on existing information and evidence to examine:

- The *key outcomes* that Oxfam (alone and/or with partners) achieved across its change goals;
- The *effectiveness of the approaches* by which Oxfam aimed to contribute to transformational change, particularly considering shifts in power relationships, changed narratives, and the ways, if any, that local initiatives connect to more systemic changes at national or global levels;
- The ways in which Oxfam and partners *evolved their understanding and ways of working* within the change goals over the OSP 2013–19; and
- The best *approaches and capabilities* for Oxfam to use as it contributes to change during the new OSP.

Two strategic learning questions guided information-gathering and -analysis across Phases I and II, and ensured that the overall Evaluation OSP remained aimed toward its objectives:

**Where does Oxfam play?** This question was thematic and focused on Oxfam’s (and partners’) effectiveness in achieving outcomes related to each change goal. This question contributed to the *accountability purpose* of the Evaluation OSP, as it explored progress achieved by Oxfam on key outcomes.

**How does Oxfam win?** This question was about ways of working, approaches, and things that Oxfam and partners did that propelled toward the outcomes in the change goals. In other words, “how does Oxfam win” against poverty? The ‘how’ question contributed to the *learning purpose* of Evaluation OSP. It explored what worked, how, for whom, and in which situations; it captured enabling and limiting factors for maximizing impact.

## The process and methodologies of Evaluation OSP

The Knowledge for Impact Team (KIT) in Oxfam International oversaw Evaluation OSP's five broad stages:

### Framing Evaluation OSP (April–May 2018)

Six of Oxfam's seven Regional Directors participated in an interview, led by Oxfam International's Monitoring, Evaluation, Learning (MEL) Coordinator, that elicited their observations about the programs in their regions. The Regional Directors described their programs' organizing principles, what they valued about the programs, and what challenges Oxfam encountered in implementing programs and achieving programmatic goals.

An analysis of the interview information clarified common problems, shared questions and, not incidentally, a number of real programmatic stars across the regions. The MEL Coordinator categorized Regional Directors' key questions and concerns into eight approaches to be examined in Phases I and II of Evaluation OSP. The approaches (in the order in which they are discussed in this report) are:

a. Program approach and theories of change	e. Women's rights at the heart of all we do
b. Partnership	f. Thought leadership
c. Influencing	g. Impact at scale
d. Active citizenship	h. Knowledge and learning

Annex II contains the working definitions of these approaches

### Information retrieval for Phase I (May–August 2018)

Oxfam undertook Evaluation OSP to add value to the many learning documents developed over the course of the past six years. Oxfam's mid-strategy evaluation, in 2016, analyzed only project and program evaluations; this later exercise, by contrast, also acknowledged the value of the many forms of knowledge—analytical reports, learning documents, case examples, and more—created by Oxfam knowledge hub (KH) participants, country and regional teams, and research colleagues.

To gather information for Evaluation OSP's Phase I, KIT extended a call across the confederation, to colleagues in countries and regions, the MEL and Influencing working group, the KH, the Oxfam research network, the affiliates and the secretariat. Later, KIT sent a special request to regional program quality leads to identify programs whose documentation may have been overlooked. The calls for documentation stipulated a timeframe of January 2016 through August 2018: the aim was to capture evolution in Oxfam's programming and thinking from mid-OSP forward.

The calls for information netted just over 225 evaluations, research reports, learning documents, and case examples. Documentation represented all regions where Oxfam works.

## **Evidence review for Phase I (September–October 2018)**

Oxfam hired five external consultants (individuals or teams), one per change goal, to each undertake a document review, interview between ten and twelve key informants, and develop three to five case examples to highlight crucial themes related to Oxfam’s approaches. The consultants’ change goal reports (which collectively represent the majority of Phase I findings) highlighted important outcomes of, and shared insights about how a specific approach (assigned to them from the list of eight above) intersected with programming in, their change goals. All consultants were asked to share insights on two approaches common to all change goals: partnership and putting women’s rights at the heart of all Oxfam does.

Oxfam initially distributed 35 to 45 documents to each consultant for literature review, but in reality, most ultimately reviewed 50 or more. Consultants had the ‘right to reject:’ they could set aside documents of insufficient quality.

Where consultants needed more information than the documents could provide, they complemented their reading with key informant interviews. Program quality leads and KHs identified potential interviewees; KIT ensured that Southern voices, both staff and partners, were fully represented on the roster. In the end, consultants interviewed a mix of Oxfam staff (in regions, countries, affiliate headquarters) and partners, though significantly fewer of the latter.

## **Validation of Phase I change goal reports (November–December 2018)**

Oxfam staff volunteers (identified for their thematic and/or geographic knowledge) reviewed the consultants’ draft change goal reports. They raised questions, offered clarifications and proposed corrections. Consultants used this input to revise and strengthen the reports. Once the final versions were submitted, KHs organized validation webinars: these were an opportunity to, among others, identify vital points for consideration in Evaluation OSP’s Phase II.

At the same time, staff participating in various knowledge networks across the confederation were invited to develop brief summaries of their contributions Oxfam achievements, and the approaches they used to do so. Four groups—the ICT4D group, the Private Sector coordination group, the Global MEL Leads Network and Regional Program Quality leads, and the KH leads—produced such summaries for consideration in Phase II.

## **Phase II approach analysis across Phase I reports (December 2018–January 2019)**

With final change goal reports in hand, a group of three Oxfam staff and one consultant launched Phase II of Evaluation OSP. Together, these four formed the team: we analyzed information as discussed below, and we wrote this report.

With the goal of understanding how Oxfam and partners operationalized the eight selected approaches across change goal work, the team began by creating an evidence grid and sorting findings (qualitative observations in the change goal reports) by their change goal/approach intersections. We weighed approach information (and corresponding successes and challenges) from the change goal reports, and input from the validation webinars and networks, against Oxfam’s ambitions as identified in OSP and related documentation.

The purpose of this Phase II analysis was to strengthen the knowledge emerging from Phase I reports by examining in more depth how Oxfam arrived at outcomes across change goals, what we can know about the approaches, and what we can determine about Oxfam's capabilities as a whole.

**Disclaimer:**

The team's view is necessarily limited because it derives from the Phase I evaluators' view, which itself is limited to what Oxfam documented well. Where Oxfam's own documentation, filtered through the change goal evaluators' work, uses imprecise or confusing terminology, we inherited it and use it too. Throughout the pages that follow, our aim is to discuss what we can determine, given the narrow slice of Oxfam's work that we see in the change goal reports and a limited number of supporting documents. Our aim is never to criticize.

Again, we do not, and cannot pretend to, talk about Oxfam's work as a whole, but only about the glimpses of the approaches as they appear in the change goal reports. We acknowledge that a great deal of good, thoughtful work is missing from our evidence set.

# CHAPTER I: CHANGE GOAL REPORTS

The outcome, collectively, of Evaluation OSP's Phase I are the five change goal reports listed below with links to each report's executive summary; these documents are available on [Oxfam's policy and practice website](#).

The change goal reports examine outcomes and how Oxfam and partners achieved those outcomes, enabling the organization to meet its accountability commitments.

For readers' convenience, **Annex I** of this document contains the Executive Summaries of the five change goal reports.

- [The Right to be Heard](#)
- [Gender Justice - Social Norms to Eliminate VAWG/GBV](#)
- [Sustainable Food](#)
- [Financing for Development](#)
- [Resilience \(cross-cutting change goal\)](#)

\*\*The full reports can be sent upon request to [mary.smiaroski@oxfam.org](mailto:mary.smiaroski@oxfam.org)

# CHAPTER II: OXFAM APPROACHES ACROSS CHANGE GOALS REPORT

Chapter II details the outcomes of Evaluation OSP Phase II: the analysis across change goals of the eight approaches (identified by Regional Directors early in the Evaluation OSP process) that Oxfam used in its efforts to rise to its ambitions.

On the pages that follow, readers will find eight analytic essays, one per approach, each of which contains:

- An introductory discussion of Oxfam ambitions (what the organization intends to achieve by using the approach) and its definitions. We do not choose to be labor definitions for the sake of doing so: in reality, vocabulary and wording are confused around many of Oxfam’s approaches and the concepts that underlie them. In many instances, we inherit *and repeat* imprecise phrasing, and ponder its implications for how Oxfam conceives of its work and of the results it seeks.
- A list of the documents that formed the evidence set for the approach analysis. The change goal reports were the basis of all analyses, and some analyses benefited from a slightly wider range of information. However, the evidence sets were tightly controlled: Evaluation OSP was not an exercise in analyzing all Oxfam information on the selected approaches.
- A review of what the evidence set said about how, and with what results, Oxfam deploys the approach across all change goals.
- Selected considerations about the approach as Oxfam looks forward and develops its next OSP.
- A limited number of learning topics, geared toward Oxfam’s overarching aspiration to become a knowledge-based organization

In the eight analytic essays, the team uses the pronoun ‘we’ to indicate where we stepped back from the evidence set to voice an opinion, concern, connection, or other relevant comment. Change goal report authors, and Oxfam as an organization, are referred to in the third person.

## A. PROGRAM APPROACH AND THEORIES OF CHANGE

### Oxfam’s ambitions and definitions

In Oxfam, *program* is a conceptual level that sits between the larger, more ambitious *change goal* and the discrete, familiar, *project*. A program is a set of strategically aligned, mutually reinforcing interventions —by Oxfam and others—that contributes to sustained, positive impact on poor people’s

<p><u>Evidence Set</u></p> <p>1. Change goal reports, all</p>
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lives. Crucial elements of a *program* are that it offers meaningful vision that informs all of Oxfam's [related] work as a holistic effort; expresses Oxfam's understanding of its contribution in a particular context; and encompasses Oxfam's ways of working that add value: rights-based approach, leveraging local to global reach, challenging unjust power structures, and striving for impact at scale.

As helpful, contrasting information, *projects* are defined in part as "the implementing or management units identified in the program design that will help Oxfam and our partners to achieve the program objectives." (Program Framework, 2014: 42) It is not always possible to determine, it must be said, if the evidence set uses the word 'program' and 'project' as defined here: in many instances, the words appear to be used interchangeably. It is likely that the same blurring of terminology occurs in the documentation that change goal evaluators reviewed.

In this section, we discuss examples of strong programs, then focus on theories of change as one building block of such programs. The Oxfam Program Framework states that "A good program design relies on good *theories of change*" or, in the case of humanitarian response, on assessed needs of affected communities. (Program Framework, 2014: 35) A theory of change should state explicitly the causal relationships between activities, outcomes and impact: in other words, how Oxfam expects the change it seeks to happen in practice. This makes the causal relationships testable (added up, are the activities working to produce the intended change or not?). This is important for Oxfam's ability to make adjustments to the program strategy over time, and for building evidence, knowledge, and learning.

In practice, however, theories of change are not simple. As the contexts in which programs operate change, as program teams discover what works and what does not, "program theories of change need to shift, too. This means we need to learn constantly." (Oxfam Program Framework, 2014: 35-6)

## **Oxfam practice**

### **Strong programs seek knowledge, act and learn to change**

The change goal reports contain three examples of quite successful programs for which Oxfam teams invested in context analysis and research; dialogue with an array of actors; analyses of power, risk and gender; and a reflection on Oxfam's added value: all these deliberately positioned Oxfam as an actor capable of responding knowledgeably and nimbly to opportunities as they emerged. The evidence set does not, we note, state that the teams involved laid out these steps and followed them in a linear fashion: in real life, the steps were likely iterative and overlapping. However, they did all begin with a deliberate decision to position themselves to seek knowledge, act and react to change.

- *Coalition Support Program in Vietnam: learning in partnership*

The Active Citizenship section of this report describes the Coalition Support Program (CSP) overall. Specific to seeking knowledge, acting and learning, the Right to be Heard evaluator points out that the CSP began with 'a strong contextual analysis that drives capacity building strategy for large scale impact,' (p 12) and that its "quite interesting theory of change...homes in

on the issue of civic space and active citizens... This program sought to support 'pathbreakers' in cross-sectoral networking by funding multiple, relatively small, targeted advocacy processes to lead to a shift toward a more inclusive, multi-stakeholder society. With this strategy, the program aimed to 'unsettle' the normal decision-making processes and create new ways of designing and delivering policies." (Roper, 2018: 8)

From its base "on a political economy analysis, Oxfam identified already operational coalitions that were working on issues that lent themselves to broad-reaching and inclusive network-based advocacy... [that held out] the promise of progressive/redistributive policy impacts in areas of public concern." (p 20) The CSP had a "strong practice of monitoring, evaluation and collective reflection examining both coalition operations and strategy. Innovations within the Vietnamese context included 'bottom-up' community impact research and strategic engagement with journalists. The CSP demonstrates the potential for bringing about systemic change in how policy is made using multiple points of entry." (p 21)

- *Active citizenship program in Zambia: changed role for changed program approach*

A new Oxfam country strategy in Zambia shifted the organizational role decisively, away from service delivery and toward a role that identified the best way to create active citizens and strengthen civil society to hold government accountable. A second vital shift was Oxfam's decision to develop its programs through networks. A deliberate process resulted in the identification of four networks (one each focused on civil society organizations (CSO)/governance, humanitarian action, women's rights, and agriculture), some of which have already gained independence from Oxfam and all of which, with time, will evolve into a civil society movement with amplified voice and strong impact. The CSO/governance network, the 80-member GovNet, has already become a formidable network, influencing the government in its negotiations with the International Monetary Fund (IMF) and influencing the IMF to embrace civil society participation in deliberations on a proposed loan. To achieve this, CSO members created a significant level of engagement with the Ministry of Finance; GovNet strategically positioned itself as a resource for the government, submitting a policy report ('Good Loan or No Loan for Zambia') that laid out loan conditions that civil society would accept. The Ministry used the report in negotiations with the IMF. GovNet simultaneously established relations with the IMF in Zambia, and with IMF representatives in Washington, DC. The IMF agreed that discussions should involve CSOs alongside government. The Zambian government made a series of commitments to enhance accountability and transparency, and incorporated an accountability chapter in the National Budget. (Roper, 2018: 26-7)

Oxfam in Zambia reflected on the challenges of its program approach, including its roles as facilitator and donor (especially as it progressively does less funding of partners for projects, and more funding of network development for processes), building consensus on policy positions, navigating members' institutional interests with their coalition roles, and addressing conflicts around branding and profile. Recent government changes have meant sharper restrictions on civic space, and less access to the executive branch and to parliamentary allies who are likewise constrained in their ability to act. Oxfam and networks have invested in scenario planning, gaming out possible future programs looking at variables such as civic space, resources, and humanitarian risks. (All Roper, 2018; 21-2)

- *Oxfam's program approach in Ghana*

The Impact at Scale section provides an overview of Oxfam's program in Ghana. Specific to program preparation, integration and follow-through, the Financing for Development change goal report relates that Oxfam's significant achievements in Ghana are due in part to its integrated approach to programming, where the programs feed insights, opportunities and lessons to each other in a synergistic way. "There are no programmatic silos. There is instead close collaboration between teams working towards a broader objective. The Oil for Agriculture initiative is the emblematic example. It represents a substantial body of work uniting aspects of the programmatic focus on extractives, [public financial management] and agriculture, as well as utilising budget advocacy and budget monitoring approaches. There is a close interaction between different areas and the team seeks to drive change in an integrated way.

"Closely connected to the above point, the Ghana team work along what they term the 'continuum of change,' connecting the local to the national and vice versa. They remain engaged on issues over the long term, moving from budget allocation to expenditure and from revenue raising to spending and back as necessary. Such a comprehensive approach is not easy to achieve. Similarly, the team has made an effort to ensure consistency over time. A law is passed, which brings new opportunities, perhaps via enhanced disclosure of information. At each step the program evolves to push for more progress. It is a strong example of very consistent programming." (Kumar, 2018: 52)

### **...But Oxfam struggles to align programs with operational limitations**

Among the structural impediments to implementing cohesive programs, Oxfam struggles to match its large, programmatic ambitions to the realities of too few resources and too short timeframes. Above we cited several of CSP in Vietnam's positive attributes, but it too encountered these impediments.

Specifically, the CSP example clarifies Oxfam's need to deal openly with partners about the disconnect between ambitions and short planning timeframes. It is unlikely that short timeframes will disappear, so it behoves the organization to help partners break the change process into manageable steps, each with clear-eyed assessments of what can be achieved in the immediate term, *without losing sight of the overall ambition*. In Vietnam, one of the four coalitions with which Oxfam partnered adopted broad policy reform goals, not fully understanding the impediments posed by "the imperatives of economic growth and the incentives of market forces, and the influence wielded by vested interests within the state itself." Another coalition chose instead to narrow its focus to draw attention to specific problems in agricultural policy "in ways that are said to have dramatically expanded the space—and improved the quality—of policy discussion." (p.21) An evaluation of CSP suggested that its overall emphasis on major policy reform may have "...incentivized the pursuit of longer-term goals, perhaps regardless of prospects, while unwittingly diverting attention and energies away from more modest but more concrete and potentially consequential alternative[s]...with longer-term benefits of their own." (Sidel, 2015: 1, 21 and 6, cited in Roper, 2018: 30-31)

## **Theories of change are useful tools...**

Several change goal evaluators found and mentioned instances of good practice related to theories of change. For example:

In some cases, it [the theory of change] finds the sweet spot between being high-level, yet detailed enough to be testable. This is the case with extractive industries work in Ghana and El Salvador, Supporting Women's Leadership in the Middle East and North Africa (MENA) Region during Changing Times (AMAL) for Transformative Leadership for Women's Rights (TLWR) in Tunisia; the Poultry Workers' Justice Campaign in the US; the EU-ANCEFA-Oxfam Education Advocacy Program, the My Rights My Voice Program working with marginalized youth; and work with Aboriginal Women in Australia through Straight Talk. (Roper, 2018: 8)

The theory of change behind Oxfam's education work towards gender equality is sound, and when implemented holistically and systematically, education [can be] as an immensely powerful driver for gender justice and reduction of VAWG... (Douglas, et al., 2018: 66)

## **...But Oxfam struggles with theories of change**

While the good examples are to be celebrated, Oxfam's use of theories of change is mixed and uneven; some evaluators use the word 'inadequate.' Across the change goal reports, we find a regrettable variety in what was identified as a theory of change, ranging from statements of high-level principles, to causal flowcharts, to detailed log frames. Some evaluations did not mention theories of change at all; the Resilience evaluator says, "Only in a small portion of the documents reviewed there is explicit reference to theories of change informing project design, implementation and evaluation." (Twigg, et al., 2018: 68) In other reports, evaluators point out basic gaps in theories or their lack of requisite complexity. Most unfortunately, in at least one instance, an evaluator recounts that consultants hired to assess a program had to construct a theory retrospectively, as it was entirely absent. (Roper, 2018: 8-10)

The eVAWG change goal report's discussion of theories of change indicates that Oxfam may be overlooking recent, evidence-based theories. More alarming, projects may be using discredited theories of change. "The most commonly used theory of change was the Empowerment theory (personal-political-societal), followed by the knowledge, attitudes and practices (KAP) framework and then role model theory. Having this information provides critical insights: the 'social movements' theory of change was the least referenced, which is unfortunate, given that this approach has been highlighted as successful in the literature for supporting work on ending VAWG from a policy perspective" (Douglas, et al., 2018: 5) Conversely, KAP is highly questioned as a theory of change in the literature as having too many assumptions to be able to be successfully implemented. (Haylock, 2016: 19) Fortunately, Oxfam's recently launched ENOUGH campaign is based on the social movement theory of change; a question remains about how to encourage more work using theories of change backed by evidence of success in the literature.

One evaluator discussed the problems arising from the absence of a theory of change at the change goal level. "Given the importance and significance of theories of change," according to the Sustainable Food report, "the authors were surprised not to find an overarching Theory of

Change, Programme Framework, or other guidance on designing programmes under the Food Systems Change Goal.” Instead, the evaluator continues, the goal “incorporates a range of programmes with different theories of change. There was little information about the exact process involved in developing theories of change, conducting power analysis or designing programmes...the lack of an overarching Theory of Change offers a high level of flexibility where programmes can be tailored to [c]ontexts, stakeholder needs as well as donor demands. On the other hand, the disparity is often seen as vague, unclear and difficult to use for programme development, management, or monitoring. It also complicates any attempts to synthesise and evaluate the impact and results of the overall Change Goal.” (Maes, and Zaremba, 2019: 28) The same report cites an evaluation of OBE’s campaigns and influencing strategies, and its recommendation that the desired end result (change or impact for the women and men whom Oxfam supports) “needs to be visualized, even if it won’t be achieved immediately through influencing approaches, in order to develop a targeted theory of change.” (Peeters, and Verhoffstadt, 2017: 30, cited in Maes, and Zaremba, 2019: 35)

### **Analyses underpin theories of change**

A theory of change is only as good as its grasp of the jumping-off place, yet the evidence set suggests that deployment of analyses (of context, gender, power), and use of their results, are mixed. The VAWG change goal report discusses a startling lack of requisite analysis in the projects it reviewed, and how that lack permeated project or program design and quality. “There were promising approaches—particularly those utilizing transformative leadership and some that utilized a multitude of strategies to generate norms change. However...short project lives, limited resources and *lack of contextual analyses with a gender lens*...contributed to these shortened shifts in social norms related to VAWG/gender-based violence (GBV). To make more substantive progress, Oxfam must make concerted efforts to *ensure contextual analyses is undertaken using a gender lens* so that projects designed have the *intent to shift gender power, norms and behavior*.” (Douglas, et al., 2018: 6, emphases added)

According to the Sustainable Food change goal report, “While Oxfam’s country programmes are tasked with developing locally relevant Theories of Change, this approach has drawbacks. The approach itself is applied differently, where some Theories of Change developed at a high level are adapted locally to deliver and apply contextually relevant outcomes and strategies respectively, other country programmes struggle to achieve this contextualisation and either find the theories of change unhelpful or attempt to fit any existing programmes into pre-cast generic theories of change without contextualising these. The GROW Latin America and Caribbean (LAC) evaluation mentioned that some teams are tempted to do ‘a little of everything’ or fail to adapt a global recipe for influencing with in-depth context analysis.” (Maes, and Zaremba, 2019: 29-30)

Finally, the Right to be Heard report presents a half-dozen examples of projects whose results cannot be fully understood, in part because absent or inadequate analyses and theories of change led to unrealistic ambitions: “In many of the programs covered by these documents, it is difficult to judge from the evaluations the significance of results, especially when they are more limited or uncertain....All this suggests that Oxfam needs to be more sophisticated in its power analysis and precise in its language. While an aspirational goal may be to transform power

relations, what is achievable in a particular project or program, within a given policy context, in a limited timeframe, may be more modest.” (Roper, 2018: 32-4)

It is notable that evaluators’ discussions of absent analyses also mention the programmatic impediments (especially optimistic ambitions versus short timeframes) that appear in our above discussion of Oxfam’s struggles with the program approach.

### **Theories of change are dynamic**

The inevitability of change—in contexts, communities, partners, and Oxfam itself—means that theories of change are not once-and-done exercises. Rather, they must be revisited, retested, and modified. The failure, in Nicaragua, to revisit the CRECE theory of change has already been discussed in several sections of this report. The Resilience change goal report, by contrast, offers one of the few positive examples of dynamism in the evidence set: “Africa Climate Change Resilience Alliance’s (ACCRA) review of its Ethiopia programme observed that its theory of change was dynamic rather than static, and had evolved over time, which can be seen in a positive sense as an example of learning and adaptive management” (Colvin and Mukute, 2018, cited in Twigg, et al., 2018: 68)

Among the Right to be Heard evaluator’s conclusions, she reflects, “While there is some merit in high-level, relatively simple theories of change, Oxfam needs to rethink its theory of change (or theories of action for specific interventions) to reflect the *dynamic and non-linear reality* of pursuing policy, practice and power change, including the high likelihood of setbacks. Ideally, these should be explicitly causal, but more mindful of feedback loops that may hinder progress, thereby necessitating alternative pathways to change. Being causal, they should be testable propositions that shape the program interventions and can be used as a touchstone to determine the need to rethink strategy as the program unfolds.” (Roper, 2018: 43)

### **Facing the future**

Oxfam has an overarching theory of change for the OSP now coming to a close, but it lacks theories for its change goals. This absence offers flexibility for a diverse, global organization that partners with millions to end poverty. At the same time, it limits Oxfam’s ability to measure and learn, to speak about progress with stakeholders, to discuss what it knows with peers, to demonstrate to donors its longer term and deeper change results; to program and fundraise in the most strategic ways; to demonstrate its impact beyond individual projects, programs or campaigns. It undermines Oxfam’s potential to become a knowledge-based organization. A renewed emphasis on theories of change must be a part of Oxfam’s future strategy, and any theory of change must exist at a sufficiently high level to be the glue that coheres the organization’s work, while having sufficient detail to be testable.

We have seen above that programs struggle to develop adequate theories of change, and that in part the lack of overarching change goal theories explains these struggles. “Programme goals or visions are not clear, and progress is consequently vague and doesn’t neatly map into overall Change Goal objectives.” (Maes, and Zaremba, 2019: 30) As it moves into its next OSP, Oxfam needs carefully to explore adequate mechanisms to provide focus and direction to programs so they add up to more than the sum of their parts—and thus help Oxfam realize its ambitions.

Likewise, the organization must strive for clarity and sophistication in articulating transformational change: what it means and how it might be achieved. Here we can do no better than to cite a change goal evaluator on this topic and its implications:

One critique was the lack of clear articulation of the interface between theory of change and power analysis, which led several programs to over-emphasize the importance of “voice” and claiming rights for effecting change. Another is the failure to take into account the non-linear nature of change, including the not uncommon realities of backlash, when advocacy successes trigger counter-moves by vested interests, including violence (threatened or realized) against activists. A third, which is becoming evident even with highly sophisticated interventions, is the difficulty of actually closing the deal – the public is heard in a variety of ways, pressure is mounted, but policies aren’t finalized, or laws or regulations are passed and then aren’t implemented.’ (Roper, L, 2018, p 9)

A large part of Oxfam’s funding for programming comes from institutional donors. However, not all institutional funding is of equal value to Oxfam: to be fit for Oxfam’s goals and ambitions, and for its strengths and comparative advantages, the organization’s fundraising should be program-driven and market-informed. When done well, program theories of change—more specific and contextual than overarching organizational strategies—can be the answer to what makes fundraising ‘program driven.’ Good program theories of change can inform about what Oxfam knows and does well; about the knowledge and experience it bakes into its work; about how it leverages a single shorter grant into a larger strategic effort for long-term impact; and about how it knows that it is making progress toward results. Good program theories of change, and the program strategies based on them, become tools of partnership, communication, and long-term relationships with institutional donors, well beyond the individual grants that fuel our implementation.

Investing in improving our theories of change is not an academic exercise: better theories of change result in better programs, period. In the next decade, the timeframe of the new OSP, Oxfam will no longer be able to squeak by implementing fragmented grants for atomized projects—not if it is serious about strengthening its influencing work. Strong theories of change will give program teams a ‘line of sight’ to their long-term ambitions, which will support Oxfam in its ambition to be a knowledge-based organization, speaking about its progress with stakeholders; demonstrating its impact beyond individual projects, programs or campaigns; discussing what it knows with peers; and learning and programming in the most strategic ways.

## B. PARTNERSHIP

### Oxfam's ambitions and a definition

Oxfam's long history of working with and through partners is fundamental to its organizational identity, its way of being and doing in the world: "Oxfam aspires to make a sustained and significant positive impact on global poverty and injustice, and believes that it is only through the collective efforts of many actors that this goal can be achieved." (Oxfam Partnership Principles, 2012: 3) For Oxfam, partnership encompasses relationships with other civil society actors, and broader forms of engagement with coalitions, networks, alliances, and stakeholders from governmental institutions, the private sector, the media, and academia.

#### Evidence Set

1. Change Goal reports, all
2. Baksi and Tennyson *Pathways to Transformative Partnering* (PBA, 2018)
3. LeitMotiv *Learning from our partnerships with Women's Rights Organizations* (Unpublished 2018)
4. Keystone *Partner Feedback Report - Summary* (2014)
5. Sanchez de Ocaña and Lenton *Aprendiendo de las evaluaciones del Trabajo de Oxfam en America Latina y el Caribe*. Oxfam (Unpublished 2018)

Partnership as a part of Oxfam's DNA permeates the OSP 2013-19; an introductory statement summarizes that, for Oxfam:

Creating the political will for change needs people, organizations, and alliances working together across continents, rich and poor countries, and social divides to drive change locally and globally. Our goal will be redistribution for greater equality of income, and of power of poor people; matched by the solidarity of concerned people in rich countries working to change their governments' policies and behaviour. Success will emerge from the partnership that links local and national action with global change.

In the latter years of the OSP period, as Oxfam has deepened its understanding of unequal power relations, it has better articulated long-standing questions about the balance of power in its own partner relations. The organization has made efforts to better grasp what partners value in their relationship with Oxfam, and to experiment with how Oxfam approaches partnership. The Oxfam 2020 vision of global balance brings renewed commitment in the organization to examine its relationships, and to explore new avenues to partnership—no longer limited to traditional funding mechanisms, but enriched with co-created purpose, more equitable relations, and a greater sharing of risk.

### Oxfam's practice

The above would foretell an evidence set rich in information on how Oxfam partners, with whom, to what ends, and with what results. In reality, the change goal reports have surprisingly little to say about partners and partnerships as forces in the organization's work and achievements—this in contrast to Oxfam's many partnership-specific analyses that describe cases of purposeful, strategic, and effective relationships. To clarify, partners are present throughout the change goal reports, but their roles and contributions are unexamined aside from a handful of responses to pointed questions (discussed below) about Oxfam's performance as a

partner, and how Oxfam is deploying partnerships as an effective means to programmatic ends. We must query what this relative silence means, if indeed partnership is central to Oxfam's organizational identity and to all its work.

This silence prompted us to expand our evidence set somewhat (as shown in the box above), which netted the third example of strategic partnership that appears below. Overall, these additional documents indicate that partners' experiences of working with Oxfam, writ large, do not rise to the organization's own aspirations; one of the documents offers a map for Oxfam's way forward, building on strengths and interests that the organization has already identified.

(The change goal reports do, we saw with interest, include many appearances of the words convener, connector, linker or linkage facilitator, bridge, and organization able to bring others together. Evaluators used these words to describe Oxfam's current or desired partnering role, or the way others see Oxfam's role. Sutton and Guijt, on the topic of Thought Leadership, state that 'convener and connector' is one leadership model (along with evidence-based) to which Oxfam seems particularly well suited.)

### **Evidence of positive, strategic partnerships**

- *Building coalitions to open policy-making pathways*

The Right to be Heard report describes the Coalitions Support Program as a complex, creative effort to change policy-making processes in Vietnam, shifting from a model in which decision-making was entirely in the hands of government authorities, to one open to a wider array of stakeholders. The evaluator categorizes the CSP as nationally focused, with a strong contextual analysis that drove a capacity building strategy for large scale impact, intended to reach even beyond Oxfam's involvement.

The CSP's guiding principles were that: 1) the policy process was as, or more, important than policy results, 2) effective advocacy required diverse alliances rather than a narrow definition of 'civil society' as the only collective actor, and 3) contextual knowledge and relationships had to guide support processes. Oxfam intentionally put coalition-building at the center of the CSP work, and identified six already-operational coalitions that were working on issues that lent themselves to broad-reaching, inclusive, network-based advocacy.

Oxfam promoted the growth of strong coalitions with democratic governance structures. It encouraged non-hierarchical coalition management, a normative commitment that required constant balancing to avoid a top-down, disempowering approach to coalition-building. Oxfam staff's relationships with coalition members were built upon a combined program of mentoring, organizational capacity-building, and advocacy capacity-building. In the latter category, coalitions learned to adopt and adapt the repertoire of influencing tactics familiar to Oxfam campaigners. The coalitions recruited new members to be more diverse, developed policy propositions, raised issue profiles through public outreach and media strategies, and engaged in negotiations with government authorities. Innovations within the Vietnamese context included 'bottom-up' community impact research and strategic engagement with journalists. CSP's four funding streams to the coalitions were for: core support, issue-based advocacy (including substantial investment in capacity development), a cross-learning fund, and an urgent opportunities fund.

Broadly, CSP sought to ‘unsettle’ the traditional way of policy influence in Vietnam: it succeeded in opening policy-making space to a wider array of voices through a critical mass of multi-stakeholder coalitions. The CSP demonstrated the potential for bringing about systemic change in how policy is made using multiple points of entry—and for influencing specific policies even in a relatively closed policy system. After CSP funding ended, all coalitions continued to function. (Roper, 2018: 12, 21-22)

- *The private sector as partner rather than target*

The private sector is embedded in food systems, locally and globally: Oxfam has long recognized the inevitability, weight, and scope of that involvement. Initially engaging private companies via outsider approaches—using pressuring tactics, for example, to expose misdeeds and inequities—Oxfam today is just as likely to generate solutions *with* companies, alongside civil society groups representing farmers and other producers. In response to questions about partnerships with the private sector, the Sustainable Food and Resilience change goal reports note several such cases.

- Oxfam has fostered, strengthened, and spun off producer groups that continue to use outside (pressuring) and inside (collaboration) approaches with private sector actors: these include the Round Table on Sustainable Palm Oil and the Seafood Task Force.
- Oxfam has engaged specific value chains, such as in the Gender Transformative and Responsible Agribusiness Investments in South East Asia (GRAISEA) project which promotes win-win-win solutions for communities, small-scale producers, and larger businesses, all with an eye to gender equity and sustainability. With the of Southeast Asian Nations (ASEAN), its member states and leading agribusinesses, GRAISEA promotes corporate social responsibility and other private sector regulatory frameworks, it demonstrates gender transformative and responsible agribusiness investments for smallholders, and it supports responsible and innovative investments in small and medium enterprises. Country-level interventions are connected to regional influencing through The Sustainable Rice Platform. In Indonesia, Oxfam’s work in the seafood sector has opened spaces for civil society to engage with local export value chain actors and engaged in and with private sector coalitions for changes in practices affecting worker’s rights. The initiative is complemented by parallel efforts in Thailand with women’s fishing groups.
- Oxfam has also engaged with non-food sectors (such as finance and digital technology) to develop innovations for small farmers in food systems. The R4 program worked with private insurers to develop a risk insurance product for small farmers in Ethiopia, and sought to increase financial inclusion of farming communities. In India, Oxfam launched the India Responsible Business Forum in which allies promote data-driven dialogue and action on Indian companies’ business practices. The forum’s annual conference with business leaders and civil society aims to make India’s businesses more socially and environmentally responsible.

(All above, from Maes, and Zaremba, 2019: 42-3)

The trend is clear: Oxfam’s engagement with (and not merely targeting of) the private sector is growing and maturing. The Sustainable Food change goal report observes that “Approaches across programs [outcome areas] and across the confederation are not yet fully aligned,” before

mentioning Oxfam's unpublished Private Sector Framework, saying it is likely to consolidate Oxfam's work in several important ways:

- a) "The core criterion for engagement with the private sector is potential impact on Oxfam's objectives to reduce poverty and bring about transformational change.
- b) The private sector requires a sophisticated and complex approach as a company can be a program partner, funder, advocacy ally, campaign target, and/or insider influencing target.
- c) The private sector is considered in all future Theories of Change and strategies as an important stakeholder to be considered alongside civil society and government." (Maes, and Zaremba, 2019: 43)

- *Cross-cutting alliances with women*

Oxfam has several examples of successful, cross-cutting alliances with women, including social organizations and female parliamentarians across the political spectrum. The LAC meta-evaluation (Sanchez de Ocaña and Lenton, 2018: 34) notes that, in Colombia, the mobilization in favor of the new Department of Rural Women also brought in the Women's Caucus in congress and the Presidential Advisor for Women's Equity, who allied with feminist NGOs and the National University of Colombia: all this occurred in the context of a conservative government. A similar process took place with the approval of CREDIMUJER in Honduras.

Among factors that enabled these alliances were a clear reading of the opportunities available in the context, strong topic parameters that aligned with focused policy asks, and the willingness of individual congress people and parliamentarians to take positions beyond their party lines. These factors bore fruit thanks to a foundation of carefully built, trusting relationships that let the alliances take advantage of favorable contexts.

Coalitions such as these are costly to generate but can be very productive. (Sanchez de Ocaña, and Lenton, 2018: 27-42).

### **Oxfam's self-image at odds with others' experience**

Three documents in the evidence set view Oxfam and partnership from outside the organization, and suggest a misalignment between the organization's own and others' views of it as a partner.

- In the 2014 Keystone Partner Feedback Report, based on an anonymous survey of Southern organizations that partner with Oxfam, Oxfam ranked just below average (compared to other INGOs that carried out similar surveys) in terms of overall partner satisfaction. It got low scores in, among others, capacity building, other non-financial support, invitations to co-shape strategy with partners, and flexibility to adapt support to needs. (Keystone, 2014:1-3)
- The sobering Keystone assessment was not offset by the results of Oxfam's more recent survey of its women's rights organizations (WRO) partners. The organization's ambition to 'put women's rights at the heart of all we do' matches poorly with the small proportion, globally, of partners that are WROs. In an informal feedback session, WROs listed Oxfam's best partnering features as amplifying the work and voices of WROs, and creating/working through networks and alliances. Their strongest recommendation was that Oxfam form

partnerships based on feminist principles rather than other criteria; in line with this, one change goal report remarked that “WROs do not yet consider Oxfam a feminist organization, noting that (our) feminist values, mission, and vision are still ‘under construction.’” (Douglas, et al., 2018: 69-72)

- After digesting the findings from the Keystone Partner Feedback Survey, Oxfam staff began to experiment with new forms of partnership in an ad hoc manner. To channel this work toward a learning stream, Oxfam supported a more concerted effort across four regions, using a mix of partnership reviews, training, and renewed experimentation. The results were captured in a 2018 report by the Partnership Brokers Association (we include it in our evidence set as part of Oxfam’s commitment to include partner voice in its OSP evaluation) that contains more than 20 case studies of varying depth and detail, and interviews with Oxfam and partner staff, in an effort to assess Oxfam’s current partnering practices and its aspirations to be a transformative partner. Among the mini-cases are instances where Oxfam’s partnerships are stale or ineffective, where Oxfam is striving to revamp its partnership models, and where innovative efforts appear to be thriving. The reflection concludes, in part, that Oxfam could significantly strengthen its brand “if it can take a big step towards a bolder and more confident approach to locally-driven, flexible and inclusive partnering practices. There is a great deal of potential... within the layers of the organization but if it is to be harnessed, leaders at all levels will need to identify [it] and give it space and support to flourish.” (Baksi and Tennyson, 2018: 3)

Of note, the Partnership Brokers Association (PBA) report also refers to the curious silence on partnership in Oxfam documentation: ‘[W]hilst detailed documentation of activities exists...it proved to be quite a challenge to actually find out what partnerships were established and what the ‘story’ of each was.’ (Baksi and Tennyson, 2018: 18)

### **A new role: working through risk**

Backlash, from legal or physical intimidation or action, has been ominously present in Oxfam’s work during the OSP period now ending. It is a constant menace looming in the background of initiatives to limit VAWG/GBV; with religious fundamentalism on the rise, it seems unlikely to remain in the background in many places. Women endure greater risk of GBV in humanitarian crises, where men sense that gender roles are shifting (as an outcome of empowerment programs, for example), and where women step into community engagement and public recognition (stemming from new leadership skills, for example).

Backlash to active citizenship work appears to be increasing in the context of closing civic space and shifts to authoritarianism. Activists face retaliation when they raise their voice and claim their rights against powerful interests. A series of extrajudicial kills in El Salvador and Honduras put the issue into sharp focus in the LAC region, but the focus will fade if not deliberately maintained. The Right to be Heard report’s Case Study 3 discusses this in some detail. (Roper, 2018: 35-38).

The evidence set offers few insights into how Oxfam is directly addressing the risks of backlash and retaliation. As a partner, including to some truly on the front lines, Oxfam bears a responsibility to address risk explicitly, and recognize that—like risk itself—the discussions and decisions must be shared. The organization must continue to explore and document ways to

discuss risk, and to identify what assets Oxfam has to mitigate risk or respond to tragedy if necessary. Oxfam is certainly not the only international organization concerned with risk to staff, partners, and participants. Sharing its knowledge about risks and how to mitigate them, and bringing others' lessons into Oxfam practice as appropriate, is in order.

## Facing the future

Partnership will continue to be Oxfam's primary way of acting in the world, and the organization is investing on several fronts to do partnership well. In the new OSP, Oxfam has the opportunity to centralize *clarity of purpose* and *value to be created* in its partnering approach. It has scope to invest in the skills of its own staff, most of whom were not hired for their partnership capacity. It can learn to embrace alliances as vehicles for reaching its ambitions to become a knowledge-based organization: they can "help to expand the knowledge horizon" for all members, including Oxfam (Sanchez de Ocaña and Lenton, 2018: 34). These actions and more will increase the odds that Oxfam will move away from those relationships that no longer serve its aims, and towards alliances that rise to its and its partners' aspirations.

Among the investments that Oxfam can make in partnership in its next OSP, the evidence set and PBA reflection suggest these may be the most astute:

Oxfam is developing a new role for itself (and new business models to support the role) as a convener, connector, facilitator, advocate, defender (of civic space) and boundary-spanner or broker. This may replace or, more likely, be added to the organization's more historic role in funding, project implementation, and capacity development. Some affiliates and country programs view this changing role as a response to a funding crisis; others see it as more accurately reflecting Oxfam's values of working with others for social justice and poverty eradication. Clarifying why Oxfam's remit and role is changing, and what the change requires from staff and partners, will help to build confidence to let go of the familiar, and create conditions for success in the new.

Make room within Oxfam for internal champions and leaders at all levels to connect and give each other confidence to do things differently. Create strategies and systems that articulate and actively promote more transformational partnership approaches.

Pull back from a narrow focus on project- and program-based partnerships to invest in long term strategic partnerships and alliances. Parallel to this, recognize Oxfam's habit of recruiting people who are good at project delivery and less good at building relationships and networks for change. Partnering skills require building and recognition: the organization should identify and reward existing champions, recruit new staff with partnering competencies, and ensure that Oxfam's recruiting requirements and on-boarding practices enable it to engage new staff who understand more transformative approaches to partnership.

Oxfam's internal and external partnering are on a spectrum: one cannot be transformed without the other. The same partnering principles should apply internally and externally, among Northern and Southern/smaller affiliates and between affiliates and country programs. Oxfam has a clear imperative to work in ways that reflect its ambition to be a good partner: it is no coincidence that the topic of power and its abuse is alive in the confederation. Oxfam's

commitment to challenge and change inappropriate power structures and behaviors where it works cannot be contradicted by its internal culture.

Partner relationships, and the trust that ideally underpins them, can be deeply damaged when Oxfam exercises excessive control. Program, finance and funding teams must better understand this, and revisit donor engagement in a way that challenges compliance and risk mitigation as priorities. Oxfam needs to re-define what accountability means in practice and explore how best to reinforce it. Partnerships can offer an effective risk mitigation strategy if they rest on openness and mutual accountability.

## Knowledge and learning reflections

Oxfam has a clear challenge ahead: to actively articulate and promote more transformational partnership approaches. The challenge will not be met with more thought papers or new frameworks: rather, it requires experimenting and finding the evidence/stories that reveal the conditions for transformation, all the while recognizing that the most important breakthroughs may result from breakdown or crisis. In partnership, this is not Oxfam's usual approach. The daring approach will require experimentation, piloting, strategy creation, systems-enabling...then assessing, sharing, and building on the knowledge that the organization accumulates.

To be a knowledge-based organization, Oxfam must understand that partnerships and other, newer forms of collaboration are fields ripe for knowledge exchange, opening Oxfam to new voices and different forms of valuing knowledge. As it moves into new forms of engagement with different and diverse types of organizations and networks, the organization will want to become skilled in building relationships for knowledge creation and exchange, and in seizing opportunities and laying the foundation for the long-term growth of all parties involved.

## C. INFLUENCING

### Definition, ambitions, contexts

Oxfam defines influencing as:

*Systemic efforts to change power relationships, attitudes and beliefs, and the formulation and implementation of official policies, laws/regulations, budgets, and company policies and practices, in ways that promote more just societies without poverty. (National Influencing Guidelines, 2015: 9. Internal)*

Oxfam does not engage in influencing as an end in itself, but as a means to the end of positive, sustainable change at scale in the lives of people living in poverty. It is insufficient for Oxfam to meet people's needs by simple service delivery. Instead, in pursuit of positive,

### Evidence Set

1. Change goal reports, all
2. *Influencing under the OSP 2013-19 Mid Term Learning Review* (Roper, 2017)
3. Sanchez de Ocaña and Lenton *Aprendiendo de las evaluaciones del Trabajo de Oxfam en America Latina y el Caribe*. Oxfam (Unpublished 2018)
4. *Influencing Resource Mapping for Oxfam International* (Unpublished 2016)
5. *Influencing to Tackle Poverty and Injustice: Learning from the Past, Looking to the Future*. Oxfam Discussion Papers (2019)

sustainable change at scale, the organization's work must be geared towards mobilizing and capacitating rights-bearers to hold duty-bearers accountable for fulfilling their responsibilities and commitments under national and international law. "This is not a radical departure for Oxfam, rather it is a call to build upon what Oxfam has proven it can do well—shape the terms of development and humanitarian debates and move a range of stakeholders toward pro-poor policies—and to do an even better job, more consistently, using an expanded repertoire of strategies and influencing tools." (Influencing under the OSP, Roper, 2017: 1)

## **Internal Changes**

To carry out its influencing ambitions, the OSP 2013-19 called for "creating a world-wide influencing network (WIN)" (Oxfam 2013: 23), which represented significant organizational change. A mid-strategy exercise to map influencing in Oxfam cites an interviewee on WIN: 'The scope and scale of work entailed...is massive, meaning huge investments in setting up new programme design, changes in partners, interlocutors, etc., while also delivering alongside.' (Sanchez de Ocaña, 2016: 22) The mapping report also discussed the significant changes that Oxfam staff had to make in their mindsets, expectations and capacities.

When Oxfam decided, during the same OSP period, to institute O2020, it launched a parallel institutional change process. Significant weight for the change fell on country and regional staff, compounding the challenges cited above. Not surprisingly, in this intense change environment, staff struggled. As late as the end of 2016, the same mapping review found ongoing uncertainty about influencing among staff, notably confusion between an (increasingly outdated) mandate to deliver projects and the newer aim to prioritize influencing. A senior leader is quoted as saying, "there is a worrying obsession with downscaling implementation (of development interventions) in exchange for more influencing work, whereas we believe it is more about sharpening programs through influencing instead of replacing programs with influencing..." Not surprisingly, an interviewee told the mapper, "[W]e are struggling to carry all teams with us and help them make the shift." (Sanchez de Ocaña, 2016: 22, 24)

By 2017, despite the confusion and stress, organizational changes were visible. "[I]t is evident that Oxfam's policy change model has evolved since the early 2000s from one of northern-driven, opportunistic campaigning focused largely on global institutions and processes to a more mature, increasingly Southern-centric influencing model that is more continuous, nuanced and multi-faceted..." The same evaluator detected significant shifts away from a project delivery mindset to a more transformative agenda that "involves increasing governments' and citizens' awareness of issues and rights, changing attitudes and beliefs, strengthening...CSOs and their capacity to work in alliance; influencing how citizens engage and governments respond to that engagement, and advancing pro-poor policies that have the potential...toward improving the lives of large segments of the population." (Roper, 2017: 11-12)

## **External changes**

During the period in which Oxfam was reorganizing itself toward its influencing (and O2020) ambitions, the global policy space changed radically. The most visible and confounding change, still underway, was the retreat from open democracies. Oxfam influencing interests intersected with global change at many other important points, such as:

- The diminishing importance of official development assistance in contrast to the rise in direct foreign investment: the private sector became a far more significant development actor
- The expanding role of emerging economies as development actors, as investors, and through mechanisms such as South-South cooperation and the BRIC's New Development Bank
- Late-stage capitalism may have helped reduce absolute poverty for many, but vastly increased inequality and sharpened the discontent of billions denied access to genuine prosperity
- People's growing disenchantment with political systems that do not or cannot consistently deliver benefits to the majority of citizens (Roper, 2018: 42)

## **Oxfam's Practice**

Despite the scope and nature of change within the organization, and around the world, Oxfam managed important advances in its influencing capacities during OSP 2013-19.

### **Expanding universe of tactics**

Oxfam's already capacious kit of influencing tactics gained several new (and innovative) tools, according to the evidence set. For example:

- *Seeking unusual allies*

In El Salvador, the extractive industries campaign began with a typical outsider strategy, pressuring the government to block mining. This shifted dramatically when a mining company filed an investor-state complaint with a World Bank dispute resolution tribunal: in effect, the mining company was suing the government of El Salvador to allow it to mine, against the government's and people's wishes. Oxfam advised La Mesa (the national roundtable of civil society against metallic mining in the country) as it filed two amicus curiae briefs in support of the government, and mounted ongoing protests against the company. Also notable, during the international expansion phase of the campaign against metals mining in El Salvador, Oxfam and partners engaged the Salvadoran diaspora. (Sanchez de Ocaña, and Lenton, 2018: 30)

Across the globe in Cambodia, as part of the ASEAN marginalized workers program, laborers in a multi-national beverage company appealed directly to international shareholders in their quest for improved working conditions: this eventually led to a successful outcome. (Coventry, et al. 2017: 45, cited in Roper, 2018: 26)

- *Engaging international actors to leverage national change*

In Honduras, Oxfam and partners appealed to UN Women for support; in alliance with the Gender Committee within the National Congress, they facilitated access to advocacy targets such as the President and First Lady. This paved the way for approving loan funds for rural women through CREDIMUJER. (Sanchez de Ocaña, and Lenton, 2018: 30)

- *Using emblematic cases in the judicial system to build public opinion and generate case law*

In Colombia, this tactic helped bring international connections to bear on implementation of the 2016 peace treaty (and subsequent agreements) ending the 30-year conflict between government and guerrillas, specifically as related to reparations for victims of human rights violations, and protection for at-risk communities. (Sanchez de Ocaña, and Lenton, 2018: 30)

- *Engaging northern governments on aid effectiveness*

Over the OSP, Oxfam's work around aid effectiveness in the North marked a shift in affiliates' approach to their own governments. "Advocacy efforts by Oxfam Novib contributed to the decision by the new Dutch coalition in 2017 to invest an additional 1.7 billion euros in official development assistance over the next four years...following seven consecutive years of aid cuts." (Kumar, 2018: 13). In the US, Oxfam created LEAF, a Local Engagement Assessment Framework to evaluate country ownership of aid programs. "Oxfam's framework has been taken up to some degree by USAID which, in several instances, has used LEAF as a resource to help its programs integrate ownership into their ways of working." (Kumar, 2018: 13-4)

### **Connecting levels for effective change**

Working at multiple levels gives Oxfam access to more information, more actors, and more ways to pressure targets. It allows the organization to use its brand as appropriate. Moreover, "[o]ne of the principles of WIN is to work at multiple levels so that local progress has ripple effects up and out, and to ensure that positive global (or national) policy changes actually flow down to lower levels." (Roper, 2017: 9) The evidence set contains numerous examples of multi-level influence work: the several below were selected for the particular types of connection they highlight, and the lessons derived from them.

- *National to local to national: linking tax reform and budget advocacy*

In sophisticated attempts toward program integration, Oxfam and partners have combined national tax reform with local level budget work. Sometimes a single coalition works at both levels, in a cohesive approach to fiscal justice advocacy; at other times, national-level work flows through several strands that, though not unified, are clearly complimentary.

In Vietnam, "the nature of Oxfam's intervention, addressing budget and tax in a complementary way and intervening consistently at local, regional and national levels, has opened opportunities for success." (Kumar, 2018: 54-59 [case study 1]). Meanwhile, in El Salvador, Oxfam and partners have worked for several years around the country's fiscal pact: they are also advocating for broad-based, progressive tax reforms at the same time as having a clear agenda on spending (bolstered by grassroots efforts to survey citizen priorities). (Kumar, 2018: 29) Though not widespread, similar efforts are underway in Kenya, Pakistan, Uganda and Nigeria.

In Bolivia, Oxfam and partners working on gender responsive budgeting negotiated access to the budget datasets of the Planning Ministry. "These datasets are not made public but Oxfam and partners have negotiated private access to enable analysis and reporting. National level advocacy (based on their analyses) has also led to a recent legislative win when the government enacted a directive related to implementing gender-responsive budgeting (GRB). It establishes clear targets and measures for sub-national governments on how to invest public budgets to close gender gaps." (Kumar, 2018: 24)

- *Regional to national: influence on taxation*

Oxfam's Asia and LAC regions have each produced a joint paper with their regional UN economic commissions about progressive taxation. In LAC, this positioning has backed up recent advocacy in El Salvador around the fiscal pact mentioned above. In Asia, Oxfam and partners are exploring an advocacy strategy around tax incentives that could be taken forward at the regional level. Such an approach is particularly needed in Asia: for many years, the global movement for tax justice has recognized regional tax work as a weak link. Oxfam's strategic action could fill a major gap. (Kumar, 2018: 39)

- *Local to national: rare success in essential services*

Oxfam's essential services portfolio has seen many positive, local-level outcomes in the education sector, and some changes to regional education policy and practices. However, less evidence exists of influence on national education policies, with the notable exceptions of Ghana and China, where impressive scale has been reached. (Kumar, 2018: 5)

- *Global to local: mandatory northern disclosure applied to Southern countries*

Oxfam and partners have been able to capitalize on access to new data, using it in a virtuous cycle to take their advocacy work to the next step. For example, the organization has been a leader in influencing the governance of extractive industries for many years. Prior to the current OSP, Oxfam contributed significantly to global Extractive Industries (EI) reform via the Dodd-Frank legislation, passed in the US in 2010, which set a new global standard for disclosure by mandating that all EI companies regulated by the Securities and Exchange Commission disclose their payments to the US and foreign governments. The US has failed to advance the commitment, and Oxfam continues its active advocacy in this area.

These advances did, however, lay the groundwork for achievements elsewhere. The European Union followed the US example and announced in 2013 a set of transparency obligations for all large extractives companies listed on EU-regulated markets. Such companies must now disclose payments made on a country-by-country and a project-by-project basis, marking a significant step in payments disclosure. The implementation decree was published in 2015, and first data collected in 2016. (Kumar, 2018: 17)

Global transparency work and analysis of data released under mandatory disclosure schemes in Northern countries directly support country teams' work in the South. Oxfam staff are now using this data for better-informed, targeted advocacy related to the revenue that developing countries are receiving (or should be receiving) from their extractive industries. (Kumar, 2018: 17) Simultaneously, strategies that target Northern extractives companies (as in the Niger case) or that advocate towards international investors, including institutions like the International Finance Corporation as a key investor in extractives projects, are used simultaneously. "The global to local approach is without a doubt an extremely important and powerful strategy." (Kumar, 2018: 35)

## **Research: Oxfam’s own, and room for research-based partnering**

Oxfam continues to invest in research for evidence-based influencing. The Financing for Development change goal report discusses the value of such research, at both broad and specific levels. “Fiscal justice is a technical area and investments in research, capacity building and the development of policy proposals are a necessary part of any successful strategy.” The research has led to interesting influencing opportunities (Oxfam is part of governmental tax reform commissions in Pakistan and Bolivia, for example) and to high-level access to tax reform dialogue. The evaluator mentions Oxfam’s strong work in economic modelling and cash flow projections (sometimes with expert consultants), and the use of indexes and ranking exercises, to inform its influencing agenda. (Kumar, 2018: 35-36)

The Sustainable Food change goal report, by contrast, says that Oxfam sometimes lacks the capacity to gather technical evidence and leverage it for high-level discussion with government and private sector actors. (The evaluator acknowledges that Oxfam’s evidence-based social research is a widely-recognized strength it brings to campaigns and advocacy efforts.) Academic and research institutions may well be doing the kind of research Oxfam needs: at present, however, the organization does not engage well with such groups, and thus misses chances to access good work and to gain collaborators in influencing activities. (Maes, and Zaremba, 2018: 34)

## **Long-term relationships help Oxfam navigate closing spaces**

Given the disheartening trend away from open, democratic spaces in which civilians can engage with their governments, it becomes ever more important to recognize that “successful influencing in more closed or limited civic space very much depends on the years of relationship and trust building that has occurred as Oxfam has worked with local partners and often local government on development and humanitarian interventions.” (Roper, 2017: 6)

The organization has impressive levels of access to governments, and constructive dialogues are facilitating change. This is visible in the active citizenship work around extractive industries in El Salvador, and around GRB in Bolivia, discussed above: in both cases, Oxfam’s relationships with CSOs (and government entities) have grown over more than a decade of collaboration and trust-building. Genuine capacity gaps also seem to be part of the reason that governments are open to Oxfam’s contribution. Long-term relationships’ link to high-level, insider advocacy is discussed in the Active Citizenship section of this report.

## **Attitudinal and normative change join Oxfam’s influencing aims**

Historically, Oxfam has aimed its influencing work toward policy change. But the global trend away from democratic governance, and toward diminishing civic space, requires “a different influencing model, much more centered around transparency, accountability to citizens, practice, attitudes and beliefs.” (Oxfam, WIN: 10 Transformational Shifts, 2012: 6. Internal)

Oxfam’s work on inequality is one such example. The Financing for Development change goal report states that Oxfam’s push to change “attitudes and beliefs, and social norms, has continued at the global level and developed at regional and national levels.” The evaluator found “very robust consensus in the literature and amongst the key informant interviewees that the

most positive outcome has been the progress made shifting the terms of the debate on inequality. The huge media impact of Oxfam's Davos reports has enabled Oxfam to rightfully claim strong thought leadership and to be setting the agenda on the issue of inequality...Oxfam is now invited to very influential, high level spaces—within Davos itself and at the G7 and the UN. It seems fair to say that Oxfam is profiled very differently to its CSO peers on this critical issue.” (Kumar, 2018: 26; see also the Thought Leadership section of this report)

Oxfam's LAC region stands out for investing systematically in changing inequality narratives, linked to and beyond the Davos work. Among the LAC team's innovations are an online income inequality calculator, a #NoFilter photo competition that invites people to submit images of inequality, and a crowdsourced film for Davos 2018 that portrays typical workdays for poor, middle-class, and wealthy Latin Americans. Among the latest initiatives is Data Iguaddad, with a dataset that can be used to create powerful visuals around global and national inequality. Notably, the LAC region is fully embracing inequality as the overarching issue it is tackling. It is striving to win hearts and minds, and to influence emotions and values. This embrace, clearly in the territory of narrative and cultural change, represents a substantial investment in the type of influencing model described by the WIN document. The region has also invested in a strategic research partnership with the UN regional economic commission in Latin America (ECLAC) to gain access to the expertise and datasets necessary for these and other products that can popularize inequality topics. (Kumar, 2018: 34-35)

### **Clear gains; victory elusive**

The evidence set makes clear that Oxfam has made progress in influencing, overcoming internal challenges and a changing external environment, adapting and refining its tactics, and expanding its aims to include attitudinal and normative change. Still, evaluators termed gains as partial, tentative and/or fragile.

Falling short of achieving transformation, these advances may still, according to one evaluator, “be significant, particularly where the process has opened up or identified space for engagement and dialogue that could lead to future changes, and may be indicative of shifts in the balance of power between civil society and governments.” (Maes, and Zarembo, 2018: 22) Another evaluator is more cautious. “Most interventions reviewed here could point to important advances, but end results were often modest, partial or tenuous. This seems to be the norm, not the exception. If this is the case, what prevents Oxfam from getting drawn into indefinite commitments with little to show for them or, conversely, abandoning the field too soon?” (Roper, 2018: 42)

### **Facing the future**

Oxfam's history of tackling the structural causes of poverty has generated a set of influencing competencies that are as important as ever. These include: its global reach and relationships; its ability to catalyze international solidarity; its holistic multi-level and multi-pronged influencing capacities and strategies; and its ability to make visible the human impacts of macro-policies, among others. Such competencies remain essential, but the rise of chauvinism and authoritarian populism also highlights the urgent need for new approaches and strategies. (Mayne, et al., 2019: 38)

The above paragraph gives Oxfam reason to celebrate, but more importantly, as it enters its next OSP, to turn this experience and these strengths to good use. One change goal evaluator suggested how this might transpire: “If Oxfam really intends to address inequality and change power relations, it needs to continue to build on the sophistication of its power analysis. The conceptual exploration and the thorough methodological guidelines on analyzing political capture...is one promising avenue...[but] whatever analysis is used should better incorporate changing dynamics regarding beliefs about governance, democracy and human rights and the role of private sector and other critical actors as potential levers or blockers of change.” (Roper, 2018: 43-44)

As discussed in the Active Citizenship section, and echoed here given its importance, the risk of disillusionment is real. People may give up “if the momentum for speaking out and advocacy is not maintained, and the government does not listen and take action.” (Besley and Dawkins, 2016: 14, cited in Roper, 2018: 39) In fact, Oxfam’s commitment to its WIN strategy coincides with a period in which people feel disillusioned even with democratic systems and institutions, not to mention how citizens of non-democratic systems may feel. “While Oxfam and many of its established partners are committed to what, for some, are decades-long struggles for social justice, the average citizen’s political engagement tends to be episodic, interest-focused and transactional.” (Roper, 2018: 38)

Given the trend toward authoritarianism, the danger of disillusionment may grow—or it may galvanize active citizens to respond. It will be up to Oxfam to closely monitor contexts, and seek and use any disruptive opportunities that may emerge.

As Oxfam proceeds to its next OSP, it will do well to consider the role of partnerships and alliances in its influencing work. One evaluator claims that building alliances, coalitions, or networks is central to most of Oxfam’s influencing work, but that this element is insufficiently studied. Existing documentation of Oxfam’s work in coalitions suggests that anticipated benefits (such as jointly overcoming barriers and increasing reach) were not automatic. In fact, the planning and resources required to arrive at such benefits may exceed project allowances, and cause the alliance to overshoot time-sensitive advocacy deadlines. (Chalk, 2017, cited in Roper, 2018:20) “There is a lot of knowledge in the Oxfam system about alliance and coalition building, but it is not institutionalized,” the evaluator concludes. “In the coming years, Oxfam will be working in contexts of considerable uncertainty and often under significant constraints. Nimble alliances, capable of doing frequent environmental scans will be needed. At the same time, Oxfam has expressed a strong belief in the importance of movements for tackling the hugely complex and political issue of inequality. Oxfam [should] develop a learning strategy around coalitions, alliances, networks and movements looking at how and under what

*Five necessary conditions for successful policy influencing per Barahona*

- Political sustainability (strength of the processes of influencing political interlocutors),
- Technical sustainability (generation of knowledge, evidence, arguments that nourish demands),
- Inter-institutional sustainability (strength of the network of actors that ensure continuity and ‘own’ the work),
- Financial sustainability (availability of resources to continue the actions taken)
- Social sustainability (communities or society now empowered, strengthened, able to continue demanding rights autonomously).

circumstances they are effective (or not) in promoting active citizenship, robust civic space and accountable states.” (Roper, 2018: 22)

Influencing work can lead to open-ended commitments—or to abrupt, premature withdrawals. The forms of sustainability outlined by Barahona (box, from his analysis of CRECE in Nicaragua and cited in Roper, 2018: 41) are worth exploring, along with an assessment of Oxfam’s added value in different contexts: this may help Oxfam prepare partners and allies to commit for the long term or, at a minimum, lay the ground work for responsible and transparent exit strategies.

Finally, in light of the antidemocratic trend, some existential questions:

- One evaluator, deeply familiar with the organization, observes, “The rights-based approach has been at the heart of Oxfam programming for decades and has been both a normative touchstone and the conveyor belt that moved Oxfam along from largely a service delivery and project-oriented agency to one in which influencing is part of every strategy. The importance and respect for human rights, advanced by the US and EU...and at least tacitly accepted by the majority of countries, is under assault, sometimes overtly, often through neglect.” Does, in this environment, Oxfam’s rights-based approach remain valid?
- How can Oxfam identify when collaborative strategies with illiberal regimes become complicit in supporting them? Does navigating within the strictures imposed by certain governments actually advance Oxfam’s longer-term goals? What is the theory of change that converts circumscribed action into systemic change?
- What influencing work should Oxfam be doing in the US and European countries where the illiberal right is gaining a strong foothold and challenging Oxfam’s core premises about human rights, democratic governance, and development progress?

(All questions: Roper, 2018: 45)

## D. ACTIVE CITIZENSHIP

### Oxfam’s ambitions and a definition

‘At the heart of Oxfam’s work is a theory of change that sees the interaction between active citizens and accountable states as fundamental to human development.’ (Oxfam, 2013: 10) The strategy’s first change goal, which deals with the Right to be Heard, may most overtly deal with active citizenship (“Poor and marginalized people can gain control over their own lives by exercising their right to political participation, freedom of expression and information, freedom of assembly and access to justice.” (Oxfam, 2013: 14)), but the concept and the goal cannot be conflated to the exclusion of other goals. In reality, active citizenship permeates all six of the OSP change goals, and each change goal’s aspiration statement claims or assumes active citizenship as an end or as a means to an end. Of note, as implementation in each change goal has evolved, questions

#### Evidence Set

1. Change goal reports, all
2. Reflections on change goal reports by Financing for Development work stream, G&C Knowledge Hub and EI Knowledge Hub

have emerged about the distinction between active citizenship as a social good to be achieved in and of itself, and active citizenship as a tactic or strategy to achieving other ends. This is further discussed below.

Oxfam has not adopted a formally agreed definition of *active citizen*, but its basic notion holds that it is one who is aware of issue(s), is informed about ways of influencing, and has the necessary skills and motivation to take effective action. This loose definition has room for refinement. The evidence set does not indicate, for example, if Oxfam has thought deeply about the different journeys women and men might take toward becoming active citizens, and how immigrants and refugees fit the category.

*Active citizenship*, meanwhile, is a broader concept that implies a relationship between a receptive state and active citizens. Ideally, it is a situation in which “active citizens...interact with accountable states and responsible businesses to create solutions that work for everyone, not just the privileged few,” on an ongoing basis. (Roper, 2018: 3) Here too, Oxfam and others have room (and reason) to refine the parameters of active citizenship, especially in light of the lurch toward nationalism and closing democratic spaces in much of the world. How is active citizenship different, and how is it achieved, when the relational assumption proves wrong and the state does not play its role?

## **Oxfam’s practice**

### **Creativity in opening civic space...**

That Oxfam centralized active citizenship across all its change goals suggests that opening civic space where people and powerholders can interact is always useful and beneficial. It becomes more valuable where political space is closing against citizens, and where powerholders are turning away from their responsibility to engage citizens. Our evidence set clarifies that Oxfam and partners have developed a wide repertoire of entry points to occupy civic space, demonstrating considerable creativity in both open and restricted contexts. For example:

In Zimbabwe, when parliamentary reforms increased CSO access to policy makers (an unexpected turn given that nation’s political strictures), Oxfam and partners created a route to influencing via consultations on health issues, notably HIV and AIDS, between citizens’ groups and local administrations. Topics such as human rights could not be broached, but government was open to citizen action on matters of public health. (Roper, 2018: 25)

Women’s organizations in Colombia pushed for opportunities to participate in that country’s peace negotiations, using the training and technical tools provided them by an Oxfam project to petition for the right to live free from violence. (Douglas, et al., 2018: 47)

Oxfam projects in many countries have opened spaces for citizen participation in budgeting negotiations and oversight, both national and subnational. In some places, such as Vietnam (further discussed in Partnership section), those spaces were formalized and appear to be lasting. In Occupied Palestinian Territories and Israel (OPTI), ‘citizens’ budgets’ are now created and published by the four ministries that, collectively, represent the social services sector.

Partners formalized cooperation with the Ministry of Social Affairs, and established 30 youth forums to monitor local budgets. (Kumar, 2018: 19-20)

### **...and in preparing citizens to occupy it**

Oxfam has long built the capacity of citizens and CSOs to more effectively engage with government, and numerous examples appear in the evidence set. Several highlight how the organization is 'walking the walk' of a broader, more inclusive definition of *citizens*. The Right to be Heard change goal report remarks, "Noteworthy among the projects and programs reviewed is the number that focused to bring the most marginalized people from the political margins and empower them as primary agents of change." (Roper, 2018: iv).

In Guatemala, a long-running Oxfam project supports indigenous peoples to reconstitute traditional authority structures on the premise that such authorities would be more able to effectively represent indigenous communities' interests with local, provincial and national government authorities. Oxfam and partners emphasize female leaders; the number of reconstituted traditional authorities has risen from 32 to 620. (Roper, 2018: 25)

Several projects built the skills of youth to engage power holders—and, worth noting, stretched Oxfam's implementation skills in the bargain. "Oxfam has been working to foster the participation of youth for decades but intensified that work, under the strategic plan in order to foster youth capacity as active citizens and change agents." (Roper, 2018: 13) Case studies in two of the change goal reports discuss the benefits and challenges of several youth projects. One study noted, for example, that "[p]rioritizing the autonomy and leadership of the youth activists—with their own dynamics of action—has implied adjustments in ways of working, that have had to be adapted in midstream and in response to challenges...it required a constant attention dedicated to the construction of consensus, the sharing of information, technical support..." The other acknowledged "the inevitable rotation in youth participation and leadership, caused by the simple fact that young people eventually become older and enter a new phase of life with other challenges and requirements." (Douglas, et al., 2018: 37)

Several examples describe where, through the efforts of leadership programs, Oxfam and partners prompted women to take new steps in their engagement with government by *becoming* government. The TLWR program AMAL (Tunisia, Morocco, and Yemen) was designed to promote the active participation and leadership of women (including the poorest and most marginalized) in local, national and regional governance structures and decision-making processes. "AMAL in Morocco and Tunisia used political openings to get women elected to local and national political office; in Morocco alone, nearly 3,000 women were elected as councilors or parliamentarians." Elsewhere, "women have been appointed to positions of authority and elected as representatives to a variety of commissions, committees and city councils in Colombia." (Roper, 2018: 24-5) The evidence set also discusses instances where Oxfam built women's capacity to act informally (for example, via SfC groups) and where efforts to promote active citizenship included women alongside men.

One evaluator wrote, "[i]t is interesting to see how learning from previous work is being integrated in Oxfam's thinking subsequently, and how informal learning practices have become more formalized in communities of practice. The Oxfam Governance & Citizenship (G&C) KH,

the Youth as Active Citizens community of practice, and the TLWR working group all clearly promote cross-fertilization and a process of developing conceptual clarity, strategies and program guidelines. However, based on the evaluative documents reviewed, this has not yet been translated consistently to the program level.” (Roper, 2018: 43)

### **The difficulty of knowing what is changing**

If active citizenship involves people’s interaction with powerholders to create solutions that work for all, and not merely for the privileged few, it inherently implies confronting and rebalancing power. Power rarely cedes willingly, and altering power balances is among the hardest (and riskiest) work that citizens and organizations such as Oxfam do. “[R]ecent work within Oxfam on the issue of political capture suggests severe structural barriers that impede even challenging power relationships.” (Roper, 2018: v) The evidence set does contain some instances in which Oxfam and partners are doing long-term, multi-faceted programs that are leading to transformed power relations: Oxfam in Ghana and its transparent budgeting work (Impact at Scale section) is a clear example, as is the CSP in Vietnam (Partnership section).

Of course, sometimes Oxfam’s active citizenship work does not strive to transform power relationships but aims instead for specific policy wins. A problem arises, however, when the latter is taken as evidence of the former. “The clearest measure of government receptivity to citizens’ demands is policy change...Succeeding in influencing policy would also seem to be an indication of a change in power relations, but one might ask is that actually so, or does it represent a temporary realignment of political forces or even just a minor concession to defuse activism and mobilization?” (Roper, 2018: 28) In the same report, the evaluator struggles to interpret the results of several projects as presented in their evaluations: “There also may be a need to interrogate whether a program is really invested in systemic structural changes or is seeking a more opportunistic and temporary realignment of political forces to achieve a policy change goal, or wants to better leverage existing structures, spaces, and processes to advance group interests. All these are perfectly legitimate choices, all require influencing activities, but not all of them will lead to or require tackling power relations in a fundamental way.” (Roper, 2018: 34) The G&C and EI Knowledge Hubs, in their reflections on the Right to be Heard change goal report, note that it may imply “more of a focus on policy change as an end goal than is perhaps the actual fact. This may be because in evaluation documents it is the level of change that gets highlighted as more easily visible. Whereas in fact policy change isn’t always the main goal...” (G&C and EI KHs Reflections, 2018: 2)

On the same topic, both evaluators who wrote case studies on Oxfam’s youth/active citizenship programs thought it important to reference the evaluation of My Voice My Rights, which cautioned against focusing “solely on voicing and claiming these rights [because]...simply engaging with duty bearers (as happened in many instances) does not in itself lead to altered power relations...Limiting a rights-based approach to voicing and claim-making...also risks not tapping into the full potential of youth and other actors (communities, care-taker and even duty-bearers) to work out and implement alternatives, thereby missing the opportunity to strengthen their capacities and expertise correspondingly.” (Roper, 2018: 14-5; Douglas, et al., 2018: 36)

More commonly, when it comes to knowing if Oxfam’s work has contributed to transformed power relations, the evidence set indicates measurement gaps, inadequate theories of change,

and inadequate analyses of power relations. These gaps and inadequacies can be said to apply to the larger field of Oxfam's active citizenship work, whether the organization's aim in any given project is building capacity, achieving policy change, or transforming power relations. The Right to be Heard change goal report offers an unambiguous recommendation in this regard:

Oxfam as a whole, as well as specific programs, need to get clearer operational definitions of active citizens, active citizenship, and civic spaces... Giving these concepts more concrete dimensionality will allow Oxfam to track change and better inform strategy. Oxfam also has to be clearer about what transforming power relations means in specific contexts and how this differs for women, men, youth, and children, as well as continued work on incorporating analysis of inter-sectional oppressions. Measurement will always be a challenge, but there needs to be a process to get to greater alignment and rigor across programs moving from the conceptual to the operational level. (Roper, 2018: 44)

The G&C and EI KHs concur, claiming the need "to gain conceptual clarity and redefine our measures of success in the upcoming OSP period." (G&C and EI KHs Reflections, 2018: 2)

### **Evolution in Oxfam's practice**

A fairly recent development, seen across several programs, is Oxfam's and partners' efforts not only to attract media coverage, but to build journalists' capacity for investigative reporting, and to foster collaborative relationships with journalist collectives or associations. In Peru, Ghana, and Vietnam, Oxfam's work with journalists is mobilizing informed citizens who can better occupy decision-making spaces, and thus supporting a necessary condition for accountable government.

Also notable, Oxfam is more intentionally promoting the capacity and prominence of Southern specialist organizations such as academic centers and think tanks, whose research complements and amplifies Oxfam own (and vice versa). One example is the Network of Southern Think Tanks (NeST), whose establishment Oxfam supported in 2014; another is Oxfam's investment in strategic research partnership with ECLAC to gain access to the expertise and datasets necessary to produce research products that can help popularize inequality issues.

Oxfam was instrumental in opening social media spaces for policy dialogue around elections in several countries in 2015 and 2016, inviting new voices, encouraging alliances, and pressing politicians on their positions. Today, the website *Actua.pe contra la desigualdad* in Peru serves to protect and expand civic space by opening access to information and connecting young, like-minded people. A growing number of more policy-oriented think tanks generates home-grown evidence on a range of issues, adding more citizens' voices to policy debates and contributing to their ability to be more authoritative interlocutors with government. (Roper, 2018: 18)

In a related vein, while some would prefer more mass campaigning, Oxfam also recognizes that popular campaigning may need to be done differently. On one hand, civic space is shrinking in important ways; on the other, there is a shift in Oxfam towards long-term narrative change, and toward cultural strategies that win 'hearts and minds' and that garner public support for new

work around, for example, inequality reduction strategies. The latter topic is discussed in the Influencing section.

### **Insider advocacy and active citizenship**

Several change goal reports mention high-level, insider advocacy, especially with governments, as a means of achieving results. Ideally, high-level advocacy is an aspect or extension of active citizenship work: the Financing for Development change goal report, for example, looks at tactics for influencing budgets and finds ample instances of active citizenship at the local level but “few national budget campaigns with very strong popular mobilization angles...Insider, high-level advocacy—*generally with coalitions* and on the basis of strong research and policy proposals—are a more common approach used. It is notable that popular campaigning appears less prevalent than might have been expected. There is no doubt that shrinking civic space is a factor here... (Kumar, 20118: 27-8, emphasis added).

The same evaluator lists several cases where it appears that Oxfam itself is the inside advocate providing economic analysis and expertise in several areas in Africa rather than citizen groups, though Oxfam has carried out insider work as part of coalition efforts. Not dissimilar is Oxfam’s work on contract transparency, which has led very recently to Oxfam meeting with the CEO of Total and to high-level government meetings in Senegal.

Oxfam’s expertise, credibility and profile on complex fiscal questions is now firmly established in the EI sector enabling extraordinarily high levels of access in this area. (Kumar, 2018: 36)

Finally, in the same change goal report, the evaluator discusses why high-level insider advocacy—which, when done by Oxfam itself, may appear to be the very opposite of active citizenship—is valuable. First, it achieves results. Moreover, “an additional aspect is how useful this strategy can be in closed contexts. Even if spaces are relatively closed for active citizenship, technically strong and credible insider advocacy can achieve influence.” The argument continues with some elements specific to the financing change goal, and others that may be more broadly applicable to all sectors:

This is not to suggest there is choice to be made between higher-level insider advocacy and active citizenship. Oxfam should always be open to both approaches, as relevant in each context. Arguably the point above is more relevant for complex revenue raising questions—in relation to tax rules for multinationals and negotiating fiscal terms with extractives companies. Genuine government capacity gaps appear a large part of the reason why governments are open to Oxfam’s contribution. However, the evidence suggests with spending the approach needs...more popular voice...to support successful budget advocacy, as the Ghana and OPTI examples also demonstrate. *There is no substitute for people power at key moments to push for concrete spending commitments.* (Kumar, 2018: 55-6, emphasis added)

### **The end itself or means to an end**

The Right to be Heard report reflects that, “In all programs reviewed, Oxfam also invests in CSOs...often as mechanisms to advance pro-poor agendas, but with more mindfulness about leaving installed capacity for the longer term.” After presenting several examples, including of media and Southern think tanks as presented above, the evaluator concludes, “Judging from

these documents, Oxfam's strategies appear to be evolving from mobilizing active citizens to support specific policy priorities of Oxfam to *supporting active citizenship*, by fortifying individuals' knowledge of policy and systems change (not just specific issues) and *leaving installed capacity* in organizations, coalitions/networks, and less formal groups and movements." (Roper, 2018: 12, 19, emphasis added) In other words, the trend described is toward active citizenship as an end in itself.

By contrast, the Financing for Development evaluator states that "[A]n early decision was taken, with Oxfam staff, for this review to treat active citizenship as a *means to an end not an end in itself*." The reasons given for this decision are interesting, and are replicated here in elided form: "[I]t is difficult to measure *the extent of empowerment due to the active citizenship approaches used in fiscal justice work*...for example, the empowerment of women involved in budget monitoring and advocacy is referred to in Oxfam documents as a matter of course, *there is no information provided on how this is being measured*...Based on the information provided it is simply impossible to assess where Oxfam's active citizenship approaches might be more effectively delivering success in terms of more effective empowerment as a specific type of result." (Kumar, 2018: 12, emphasis added) Financing for Development, therefore left the larger question of assessing "whether there are transformative changes associated with active citizenship in relation to empowerment aspects" to the Right to be Heard change goal report. (Kumar, 2018: 12)

Finally, in its reflection on the Right to be Heard report, the G&C and EI Knowledge Hubs pinpointed their own key question for future work as, "Is Active Citizenship an end in itself or a strategy to reach an end?" It recommends that Oxfam "Use the development of the new OSP as an opportunity to refresh our understanding of 'active citizenship'—and foster a discussion on exploring 'active citizenship' as a strategy or as a civil good in itself. Is it one or the other, or both?... [T]his is an approach that underlies all change goals. Yet there is also a need for greater conceptual clarity, especially when it comes to how we measure or define what an 'active citizen' is." (G&C and EI KHs, 2018: 3-4)

## Facing the future

The foregoing makes clear that Oxfam has much framing yet to do around active citizenship, and knows it. The evidence set abounds with references to what can't be known, at least in part because the organization lacks definitions, standards, and criteria for understanding change, not only surrounding active citizenship but its overlap with adjacent phenomena such as transformation and empowerment. The Right to be Heard change goal report makes a broad case for this:

*Part of the challenge for evaluator is that, while Oxfam has developed a relatively strong practice and frame for assessing the policy influencing process, this is not the case for evaluating active citizenship, civic space, or the transformation of power relations. For example, there is no agreed upon criteria for defining an active citizen. Nor has Oxfam provided guidance to evaluators or criteria for identifying when, for example, power relations are "transformed"... or civil society "strengthened". In this set of documents, for the most part, evaluators were left to their own devices in terms of operationalizing key concepts and defining criteria by which to judge progress. (Roper, 2018: 6-7)*

With honorable exceptions (AMAL, Youth in Nicaragua, others), much of the active citizenship work appears 'gender neutral' at best, perhaps reflecting Oxfam's uncertainty over how to meld its women's rights approach with its active citizenship approach. This gap is related to the overlaps (with empowerment, transformation) mentioned above, and has implications in and of itself. For example, how can active citizenship work, and the issues it seeks to change, be effective avenues for transforming gendered dynamics? Can Oxfam identify how the journey to becoming an active citizen differs for women, and provide more targeted support? How can Oxfam attack the questions of empowerment, power transformation (including the gendered aspects of power in any given scenario), and understand what it really means?

Oxfam is keenly aware of several risks associated with its active citizenship work, including threats to the wellbeing and even the lives of participants who confront entrenched powerholders (see Partnership section). The change goal reports also surfaced some lesser (but still learning-worthy) types of peril, including the risk of young people's disillusionment with formal, established organizations such as Oxfam, and the risk of citizen fatigue and disillusionment with trying to engage illegitimate or non-responsive institutions.

Despite the noted gaps in defining, framing, and measuring progress, Oxfam has creatively persisted and adapted to a changing world, maintaining and even opening new spaces to ensure continued engagement across a broad spectrum of actors. The upcoming OSP development process offers opportunity for the organization to realize its significant potential as a knowledge-based actor in this realm. As one evaluator notes, Oxfam is "literally sitting on a world of experience" that, once articulated, could contribute to important discussions around thorny issues such as the relative success of coalition building, the forms and efficacy of government engagement under different policy regimes, and the dynamics around citizenship activism that are gender transformative, amongst others. Not only are these and other topics of interest to MEL and program colleagues, they overlap with policy research interests, and with the interests of academic researchers external to Oxfam. (Roper, 2018: 45)

### **Knowledge and learning reflection**

The Right to be Heard evaluator says that Oxfam is 'sitting on a world of experience' that could be transformed into a wealth of knowledge to deal with problems that appear in numerous evaluations and learning documents (and, it should be said, not only in evaluations associated with the Right to be Heard report). Across all of Oxfam's work, active citizenship is both a concept and a practice, a strategy and a social good, the theory of change that underpins all Oxfam's work. It seems evident that Oxfam could make a significant step change in its practice on the road to becoming a knowledge-based organization by establishing a confederation-wide strategic learning agenda around active citizenship *because* it underpins all its work. In addition to improving practice, Oxfam could contribute significant insights to the sector at large, precisely at this time when civic space is under threat and innovation and creativity are most needed.

The same evaluator points out Oxfam's imperative to establish a mechanism to jointly identify, prioritize, and fund the most strategic evaluations across the confederation, to burnish the quality of the evidence and lessons that can feed into the above learning agenda. During the OSP now coming to an end, programs and projects have responded to donor demands for evaluations; while these ensure a minimal accountability, they do not always generate the most

strategic learning agenda for Oxfam or the sector. This is the right moment for Oxfam to undertake a more proactive approach to the use of limited evaluation funds, fully engaging with donors in a partnership and sharing with them the benefits of a more strategic learning agenda.

## E. PUTTING WOMEN'S RIGHTS AT THE HEART OF ALL

### Ambitions and definitions

The phrase 'Oxfam puts women's rights at the heart of all we do' dates from the strategic plan period now drawing to a close. It is at once a rallying slogan, and a frank recognition that the social categories of male/female (and the inequitable distribution of rights, privileges, responsibilities, and powers contained therein) are incompatible with full human development. Putting women at the heart of all Oxfam does requires a deliberate journey from sloganeering to programming that reflects a grasp of gender as the universal inequality, and understands where and how any given project or activity propels (or not) people toward equality.

It can be difficult to mentally isolate 'women's rights at the heart of all we do' from Oxfam's Gender Justice program (and its four priorities, of which one is gender mainstreaming): the mind tends to overlay the *approach* and the *program* and view them as one. Definitional documentation within Oxfam is not always helpful in separating the two. We underscore that our evidence set reflects the profusion and conflation of vocabulary and ideas that exist within the organization as a whole: change goal evaluators write of gender mainstreaming, gender justice, women's rights, working with women and men, gender-sensitive work, empowerment, and more. Our own discussion necessarily encompasses this range of incompletely separated ideas and categories.

The foregoing is not intended as meaningless criticism, but as a frame to the sections that follow—and to underscore the opportunity represented by the new OSP to clarify Oxfam's purpose in this regard. An organization that cannot articulate what it means by putting women's rights at the heart of all its work will almost certainly continue to struggle to act on its own intentions, and to rise to its own aspirations.

### Oxfam's practice

As noted, Oxfam's Gender Justice program encompasses four priority areas. Our evidence shows that Oxfam can do good, and even transformative, programming in the three areas that the organization refers to as stand-alone Gender Justice work: TLWR, Women's Economic Empowerment (WEE), and eVAWG. The fourth area, which deals with Gender Mainstreaming—and which may most closely correlate to the ambition expressed in 'Oxfam puts women's rights

#### Evidence Set

1. Change goal reports, all.
2. Reflections on change goal reports from Resilience, G&C, EI, VAWG/GBV knowledge hubs
3. Haylock, *A Conceptual Framework for the Midterm Outcome Evaluation of the Gender Justice External Change Goal* (Internal, 2016)
4. Leit Motiv *Learning from our partnerships with Women's Rights Organizations* (unpublished, 2018)

at the heart of all we do’—does not appear to rise to this same level. Oxfam has latitude to provide more value here.

### **Equality-centric framing makes for good programming**

Programs that make use of Oxfam’s frameworks on WEE, TLWR, and eVAWG, or of similar equality-centric frames from other sources, appear to be doing quality work and achieving noteworthy results. Three examples from our evidence set are:

#### *REE-CALL*

The Resilience change goal evaluator describes Resilience through Economic Empowerment, Climate Adaptation, Leadership & Learning (REE-CALL) as “the project that best exemplifies the development of transformative capacity and transformation of power relations through women’s empowerment.” It was structured upon a women’s leadership framework, and four inter-linked intervention areas. It delivered unambiguous gains for women’s empowerment, including women’s decision making and women’s mobility, and contributed to reductions in violence against women. The activities that led to these changes included the formation of community-based organizations (CBOs) by community members themselves, which created space for joint discussion, decision-making, and action (such as facilitating savings and access to loans), and for holding local governments to account. These structures also boosted women’s confidence and participation, and gave women a safe space for dialogue and solidarity; the CBOs became a tool to leverage wider change in community practices such as early marriage. REE-CALL implemented a gendered enterprise and markets component that scaled up inclusive dairy markets: the aim was to reduce poverty; increase food security and incomes for women smallholder farmers; and provide services, technologies, information, training and links to markets. (Twigg, et al., 2018: 16-17)

#### *GRAISEA*

GRAISEA posited that financial viability and gender equitable and sustainable supply chains were not mutually exclusive. In six countries, it promoted win-win-win propositions for communities, small-scale producers, and larger businesses. Importantly, GRAISEA used a common WEE framework intended to transform women’s rights, via a deliberately multi-level strategy. The project increased women’s knowledge, self-perception and mobility (individual level). It strengthened women’s collective capacity to achieve common goals (collective level). It removed barriers for women’s status in value chain activities by putting gender transformative principles into international standards, principles and criteria of sustainable agricultural practices, and by creating benchmarks of transformational partnerships in WEE for companies in agricultural value chains (systemic level). GRAISEA’s mechanisms to diffuse Gender Transformative Principles into policies and practices ranged from farmers’ associations to high-level targets (UN Guiding Principles on Business and Human Rights). (Maes, and Zaremba, 2018: 25)

#### *Active Citizenship Program for Women and Youth*

In Nicaragua, Oxfam and partners used bold frameworks to guide feminist, youth, environmental, and lesbian, gay, bi-sexual, transgender and intersex (LGBTI) activists towards

transforming social norms, amplifying critical voices against religious fundamentalism, and using social media for equality and women's rights. An alarming reduction in Nicaraguan women's legal and bodily integrity rights led Oxfam to support the articulation and promotion of the demands of youth networks and women's and feminist movements to counter these rights denials, using frameworks that helped all participants recognize that citizenship emerges from a patriarchal agreement, that the concept of citizenship itself is built upon unequal power relationships, and that exclusion is at the root of the power held. New youth collectives were created; investments were made in new leadership concepts that question the reproduction of authoritarian, sexist, and homophobic practice; and relationships were built between feminist, youth, environmental, and LGBTI activists. These alliances with youth activists were able to transform elements of social norms by strengthening influence in families and reference communities, amplifying critical voices against religious fundamentalist views, and enhancing the use of social media in favor of equality and women's rights. The Nicaragua work showed the good results that Oxfam can achieve when it deploys active citizenship in the service of gender equality. (Douglas, et al., 2018: 35-37)

### **Partial efforts yield partial results**

In the absence of frameworks like those mentioned above—researched and tested programmatic tools including gender analysis, MEL structures, and theories of change—well intentioned efforts to address gender can lead to outcomes that are partial, fragile, or reversible. For example:

#### *The R4 Rural Resilience Initiative*

R4 intended to help vulnerable rural families in five African countries, but mid-stream gender analyses and evaluations revealed many unintended differences in the projects' effects on men's and women's lives. For example, "households headed by women experienced lower increases in production of staple crops, likely an indication of the systemic biases in agriculture production, such as access to land, inputs, and equipment," and "The economic environment is not conducive for women to take on loans as some fear that they will not be able to repay. Women's high illiteracy rate compared to that of men, and discriminatory social norms that do not encourage women's participation and leadership in community decision making, remain significant obstacles." The evaluation found clear improvements in crop production and capacity to cope with shocks, but these were unevenly distributed due to gender inequalities including women's disproportionate share of unpaid work. The evaluation concluded, in part, that R4 initially failed to create "targeted interventions to overcome negative social and cultural practices and norms, power imbalance, inability to be part of important decision making, including over the use of income, and higher illiteracy rates." (Twigg, et al., 2018: 58-60)

#### *Saving for Change (SfC)*

Several change goal evaluators mentioned SfC as widely popular, easily replicable, and quite effective in building women's individual and collective power to increase income. They cited how SfC is a convenient vehicle for change in other sectors: Oxfam often implements SfC with an 'and' (SfC + agriculture, SfC + health care, SfC + citizenship). The Resilience report quotes an SfC evaluation at length:

'Social vulnerabilities are reduced by training participants in gender equity and equality, new masculinities, values, such as responsibility, trust, accountability, and the knowledge and exercise of their rights...the SfC + citizenship component of the programme was a way to be more intentional in raising women's awareness about their rights as citizens under Malian law and the importance of political engagement, such as advocating for their interests before local government authorities. Women found them [activities designed to support women's rights, even through small steps, such as issuing identity papers, formalizing marriages to provide protection from abandonment and disinheritance] highly significant, according to the evaluation, just as many found even slight increases in decision-making power that came with greater economic contribution to be of tremendous value. (Twigg, et al., 2018: 55-6)

One is struck by the acknowledgment, in the above, of activities "designed to support women's rights *even through small steps*," and of women appreciating "*even slight increases* in decision-making power" (emphases added). The comments feel downright ominous when juxtaposed with the conclusion of another SfC evaluation cited in the same report: "Husbands, household heads, and village chiefs tend to support SfC because it does not challenge this social structure [of the subordination of women]." (Twigg, et al., 2018: 41) We understand that Oxfam is acting on these learnings, and undergirding SfC with more deliberate efforts to achieve gender justice, but that results of such work are not captured in the change goal reports.

### **Social norms change in non-Gender Justice projects**

Aside from projects doing standalone gender justice work, the evidence set makes clear that Oxfam struggles to mainstream gender, and to understand and operationalize what it means to put women's rights at the heart of its work. The eVAWG report makes an interesting attempt to map two phenomena: what happens when Oxfam (a) makes deliberate efforts to address and alter gendered social norms in (b) projects that are not standalone gender justice work?

The evaluator finds that Oxfam projects in several sectors had good outcomes when they included such efforts: "[S]uccessful programme outcomes were evident when projects managed to work across sectors and created meaningful links between work on VAWG/GBV and economic empowerment, education, transformative leadership, sexual and reproductive health and rights, humanitarian efforts and resilience after disasters and risk reduction. To create long-lasting shifts in the social norms that underpin gender inequality, Oxfam's challenge is to bring this transformative approach across all sectors, despite donor requirements often reinforcing silos." (Douglas, et al., 2018: 74)

The eVAWG KH, in its reflection on the change goal report, goes further. Agreeing that this and other evaluative reports "reveal to us that having a standalone Gender Justice change goal with a strong focus on shifting negative social norms that underpin VAWG/GBV is simply not enough," it recommends that Oxfam needs to "have a strong standalone Gender Justice change goal *and* to mainstream a transformative approach to social norm change into all of the work that we do across all change goals." (VAWG/GBV KH Reflection, 2018: 2)

## **Absence of evidence and evidence of absence**

All change goal reports commented on what evaluators could *not* determine about women's rights in Oxfam's work, either because programmers failed to document their efforts or because the work being evaluated did not, in fact, centralize women's rights. It was not always possible for evaluators to tell the difference.

The change goal reports tend away from direct criticism of individual projects, but the broader observations and recommendations *in all of them* point quite consistently to gaps in analysis, design, and MEL structures—and perhaps even in the will to centralize women's rights. For example,

'It is difficult to generalize about gender and fiscal justice and approaches used. This is a huge issue as presumably Oxfam is interested in understanding how teams are working with WROs...It would be useful to know much more about how a consideration of gender inequalities is directing the strategic focus of budget and tax work, evidence-gathering...policy asks.'  
(Kumar, 2018: 31)

'One unfortunate deficiency was an overall lack of gender analysis in the majority of evaluations, particularly given Oxfam's commitment to put women at the center of everything it does...[W]hile programs reflected efforts to be more inclusive of women, which is a step in the right direction, most fall well short of gender-mainstreaming, much less transformation of gender relations.' (Roper, 2018: 7)

'Whilst most (humanitarian) Real-Time Reviews (RTR) highlight some consideration of gender issues and a recognition of the differing needs of women and men—the extent to which this was visible across programme design and implementation varied significantly.' (Knox-Peebles, et al., 2018: 21)

'Several evaluations call for more concentrated efforts to build women's rights into the core of programming and campaigns. The level of gender analysis and gendered approaches in designing, implementing and monitoring programmes is vague across most of the evaluations.'  
(Maes, and Zaremba, 2019: 47)

'It is not always clear whether projects supporting rights and targeting women do so because this is what is suggested by initial need assessments and gender analyses, or because one of the core goals of the OSP is to transform power relations anyway and promoting gender equalities is formulated as...a key aspect to reduce vulnerability.' (Twig, et al., 2018: 55-6)

'Gender mainstreaming has not happened in all the change goals and themes. Oxfam is part of the global GBV call to action, but still the commitments are not met. Oxfam is still struggling to find space to fully and meaningfully implement transformative approach to gender in all change goals.' (Douglas, et al., 2018: 71)

## **It matters whom Oxfam works with... and how**

Oxfam does not have data on the number of its projects and programs that strive to mainstream gender, but it does know that collaborating with WROs can make a difference.

For example, in the inscrutable work around taxation related to fiscal justice, the Oxfam team in Vietnam invited a WRO to join the national budget coalition and the tax justice coalition. “When assessing the potential impact of the proposed VAT reform, this partner was able to ensure the potential impact on women was correctly assessed and strongly referenced as part of national advocacy.” (Kumar, 2018: 33). In good partnerships, key competencies are recognized.

In the same change goal report, the evaluator highlights Oxfam’s GRB work in other countries, such as Bolivia, where partner WROs (originally supported by UNIFEM) are crucial in local and national wins. Local advocacy led to numerous budget reallocations by sub-national governments to benefit women, and “Oxfam and partners are currently supporting the participation of women in around 80 municipal governments, implying around 25% coverage of local governments in the country....National level advocacy [in Bolivia] has also led to a recent legislative win when the government enacted a directive...[that] establishes clear targets and measures for sub-national governments on how to invest public budgets to close gender gaps.” (Kumar, 2018: 60)

That said, Oxfam’s report on its partnerships with WROs (also discussed in the Partnership section of this document) does not paint a compelling picture of practice. The organization’s own output reporting figures show that, over the last five years, an average of just 10 to 11 percent of all Oxfam partnerships are with WROs working on gender justice. The report ends with a call for Oxfam to increase the numbers and proportion of its partnerships that are with WROs—and to learn from them what it may truly mean to put women’s rights at the heart of all we do. (Leit Motiv, 2018: 49-50) As the eVAWG evaluator quotes from that report, WROs “do not yet consider Oxfam a feminist organization, noting that (our) feminist values, mission and vision are still under construction.” (Douglas, et al., (2018: 69)

## **Facing the future**

Affirming the importance of putting women’s rights at the heart of its work, the several exceptional pieces of work in Oxfam’s Gender Justice program cannot stand for the whole implied by the organization’s gender ambition. We suggest that, if Oxfam had made substantial advances in gender mainstreaming—that is, moving from sloganeering to passionate and informed staff and partners doing quality programming built on gender and power analyses, explicit gender justice and women’s rights objectives, and deliberate actions to address the structures and not just the symptoms of gender discrimination—these would be apparent in the evidence set. The volumes of evidence and reflection collected during this sense-making exercise make clear that, despite some recognition-worthy work, Oxfam has yet to make good on the promises implied in putting women’s rights at the heart of all it does.

The new OSP planning period offers opportunity to reflect on the gaps between aspiration and reality as suggested in the foregoing discussion—but also on areas where Oxfam is already adding value and may be able to use these to advance women’s rights and gender equality across its development and humanitarian programming.

One such arena may be thought leadership: specifically, the two cases (see Thought Leadership section for full discussions) where Oxfam is advanced in its thinking, relationships and (to a degree) practice. The organization’s leadership and influencing on *inequality*, and its

privileged relationship with major-leaguers such as IMF and World Bank, have earned it a global podium from which to amplify, clearly and forcefully, that gendered inequality is a social construct with policy implications. Oxfam's capture of the global stage on the inequality topic is fortuitous, but also a result of its strengths in research, knowledge, influencing, and partnering: the organization has earned this podium, and has opportunity to ensure that gender, and the deep structural inequalities it represents, is rightly at the center of global debate and practice.

At the same time, Oxfam *WE-Care* is influencing thinking and action on women's unpaid labor not only within Oxfam but in WROs, governments, the UN, and the private sector. Some two dozen Oxfam country programs are using *WE-Care* tools to address unvalued care work. Gender-responsive budgeting at local and national levels is one appropriate entry point for Oxfam to do more work on the care economy. As the Financing for Development change goal report points out, GRB "can enable teams to look at investments to address the distribution of the burden of care and the provision of necessary care services (whether targeted or universal, free or subsidized). The team in Bolivia is starting some innovative work in this area that could be an interesting experience to document further." (Kumar, 2018: 63)

But the above is just a start, one that further engages certain pockets of the organization in certain elements of the 'all' implied by the aspirational slogan. Not terribly long ago, Oxfam made a deliberate commitment to become a rights-based organization. It made overt, considered efforts to transition its staff, its processes, and its approaches from working to meet people's needs, to working with people to claim their rights. Oxfam staff with ten or twenty years' longevity will recognize that the simplicity implied in a definition on Oxfam's own website (*Taking a rights-based approach to development is a way of thinking about, designing, and managing development programmes that is guided by the legal standards found in the range of international human rights treaties and conventions, and the values and principles that inform them*) is misleading. The work to change an organization and its people is hard and long, but it can be done.

Today, Oxfam is a rights-based organization but it is not yet a women's rights-based organization. The evidence set offers but a narrow view of Oxfam's body of recent work, and surely misses much of the important, passionate, and creative work of committed staff and partners. The evidence does, however, imply an organization not yet certain how to make the next leap, and therefore not yet invested in doing so. The Gender Justice program is doing worthy work, and it alone cannot carry Oxfam to the place implied by its slogan. The leap from rights-based to women's rights at the heart of all is not as long as that from needs-based to rights-based, but it is deep. It implies going beyond legal standards, treaties, and conventions, and digging into the hidden, contradictory and deeply embedded gender norms that all societies perpetrate, and that all individuals—Oxfam staff, partners, and community members around the world—absorb with their earliest breaths. This last leap, from rights to women's rights, may not be as ambitious as the first—after all, the rights base is now in place—but the commitment required will be no less

### **Knowledge and learning reflection**

Putting women's rights at the heart is both an organizational challenge for Oxfam, and a matter of knowledge and skills at the level of individual projects. Within Oxfam's Gender Justice

program, the eVAWG change goal evaluators reviewed a study on Oxfam’s *engagement of men and boys* to stop violence against women and girls. The study found that staff lack knowledge and skills on why and how to engage males, despite several Oxfam projects and especially despite extensive literature on strategies, successes, and insights from many areas around the world. (Douglas, et al., 2018: 26) Women alone cannot (nor should they be expected to) achieve an end to VAWG. Oxfam must build its own skills and commitment to engaging men and boys in all eVAWG work. (Likewise, the evaluators found that a number of eVAWG initiatives were based on the Knowledge Attitudes and Practices framework, which is now the subject of significant critique in the literature, including in Oxfam’s own documentation; see Program Approach and Theories of Change section for more).

Good quality programming is paramount: Oxfam cannot afford to support initiatives that are not well grounded in learning from its own practice and in solid understanding of the latest insights from literature from the broader development sector. This means investing in people, supporting solid professional development opportunities, and creating moments for learning and exchange.

Oxfam must become bolder in developing new forms of collaboration with WROs. In practice, this means that WROs can and should be driving the conversation about priorities to put women’s rights at the heart of all Oxfam does (and about the budgets and other operational supports to implement such priorities). Peer organizations may have great examples of how to be better partners and what they have learned in their relationship with WROs: it is incumbent upon Oxfam to explore this learning option.

## F. THOUGHT LEADERSHIP

### Oxfam’s ambitions and a definition

Oxfam’s ambitions for a WIN set out objectives or transformational shifts, among which is to “strengthen Oxfam’s position as a thought leader on poverty, social and gender justice, and sustainability.” Linked to this transformational shift, the WIN document continues, “Oxfam already has significant comparative advantages as a knowledge leader, including our brand, access to field data, ongoing MEL work, outreach capability and communication skills. In order to remain influential and deliver greater impact in a rapidly changing world, Oxfam needs to strengthen and evolve this position.” (OSP - WIN/10 Transformational Shifts, 2012: 3) More recently, Oxfam has begun to articulate an overall understanding of its role as thought leader, and the value of thought leadership to the organization’s global aims. An internal paper asks and answers *why* Oxfam might want to pursue thought leadership in certain topics:

#### Evidence Set

1. Phase I Change Goal reports, especially Sustainable Food, Financing for Development
2. Sutton and Guijt, *Thought Leadership in Oxfam: What it is, how we do it and how to foster more* (Unpublished, 2017)
3. O’Donnell, Responsible Program Data Policy, personal communication, Dec 2018

Thought leadership strengthens our credibility which increases our ability to implement our poverty reduction agenda. When we are considered to be leading thinkers/do-ers in the world of poverty reduction we are more likely to receive funding, our ideas will be taken seriously, we will be able to influence policy more effectively, and others will follow our best practice. We will also have a stronger platform for amplifying the voices of our partners and the poorest. (Sutton and Guijt, 2017: 2)

The same paper suggests how Oxfam, as an international NGO, can inhabit thought leadership in a manner that plays to its strengths as implementer, partner, researcher, convener, and influencer:

In simple terms, Oxfam would be a thought leader when others think of us as being the ‘go to’ organization for a subject...Thought leadership is about being at the cutting edge of debate and practice, having a strong understanding of a topic, and some evidence base on which to ground expertise. It is about asking the right questions and generating discussion and experimental practice in a collective process of finding answers. It is about pushing the frontline of where solutions might lie. Oxfam certainly doesn’t need to have all the answers, but will work with others to push forward the enquiry.’ (Sutton and Guijt, 2017: 1)

1. The authors emphasize four elements that are essential to thought leadership in Oxfam:
2. It is about bringing new ideas, thoughts or practices to the debate about poverty reduction.
3. It is a title designated by others: Oxfam cannot meaningfully declare itself a thought leader.
4. It compels change in Oxfam’s own and others’ thoughts, attitudes and/or practices.
5. Oxfam arrives at thought leadership in partnership with others.

## **Oxfam’s practice**

The change goal reports describe two clear cases in which Oxfam has exercised thought leadership in recent years: women’s unpaid care work and inequality. Both are well enough known in Oxfam that the descriptions below concentrate less on the ‘what’ and more on evaluators’ conclusions and how the cases may illuminate future Oxfam’s choices.

### **WE-Care: practically, in the lives of women and men**

WE-Care combines research, evidence, and tools to centralize unpaid care and domestic work as key factors in achieving gender equality and economic development. It is an example of knowledge-led thought leadership that fits well in an action-learning oriented organization such as Oxfam: it operationalizes theoretical concepts into programming; it collects evidence of the challenges of real unpaid care work in real people’s lives, and it suggests how the challenges can be addressed in practical ways. Oxfam’s approach to unpaid care work goes beyond macro surveys to include practical tools that, when used at micro level, provide immediate, context-specific, opportunities to reduce and redistribute unpaid care work and to change social norms around it.

The individual who led WE-Care development had worked for Oxfam for over a decade and was well known in the organization. “Since it proved difficult to convince senior management initially

to allocate specific resources on unpaid care research, she took a bottom-up approach by using her network of contacts to develop, test and eventually use rapid care analysis in long-term programs and relief efforts, which led to improved women's empowerment outcomes across various kinds of programs and followed by more demand by others for using the tools. This bottom-up approach was strategic: when this new approach became known within higher echelons in Oxfam, it was already tested and proven to work by evidence and experience." (Maes, and Zaremba, 2019: 56)

WE-Care has contributed to narrative change, that unpaid care is not a "burden to be minimized to get women into the formal economy," but a "social good, where the focus should be on more and better care." (Maes and Zaremba, 2019: 76) Oxfam's unpaid care agenda has infiltrated the thinking and especially action of organizations at many levels, from local to global, from WROs to governments, the UN, the World Bank and the private sector. Research publications, trainings, and participation at conferences, have sparked others' recognition of Oxfam's leadership in women's unpaid work. WE-Care is cross-disciplinary and can be integrated into any kind of programming: this may have contributed to its importance for thought leadership.

The case study sounds several cautionary notes about the organizational environment surrounding WE-Care:

Within Oxfam, the enabling environment was not sufficient for WE-Care thought leadership to emerge independently: it required the persistent hard work of an individual who initially used her own time to research, network, and secure grants. If breakthrough to thought leadership is dependent on this kind of personal initiative and perseverance, other opportunities for leadership are likely to be missed.

As WE-Care grows, it risks becoming a victim of its own success: increasing demands on program management compete with maintaining thought leadership itself, such as exploring, researching, and networking. At present, Oxfam's unpaid care work is somewhat institutionalized, but still wrestles with a lack of long-term core funds and staff turnover. Institutional memory loss is a real threat. (Maes, and Zaremba, 2019: 53-57)

WE-Care may have greater impact if Oxfam supports additional links between it and other aspects of sustainable livelihoods work, women's rights work, and active citizenship work—even perhaps inequality.

### **Inequality and the potential of Oxfam's podium**

Since 2014, Oxfam has released an annual report on extreme economic inequality to coincide with the World Economic Forum at Davos. Consensus is clear that the most positive outcome from Oxfam's research has been the global podium it has gained for the organization. The Financing for Development change goal evaluator claims that "the terms of the debate on inequality have shifted" (Kumar, 2018: 43) as a result of Oxfam's Davos moments, as evidenced by the volume of media coverage and by the pick-up of Oxfam ideas in the speeches of political leaders at national (China, US, India, Italy, and more) and global (UN, Vatican) levels. The use of Oxfam's WIN, and concerted action around the globe, are also increasingly important: in 2018 every Oxfam affiliate, at least 30 country teams, and six regions promoted the messages

of the Davos report and press release. Many incorporated nationally-specific statistics and stories, driving greater media interest. The global work thus creates opportunity for country teams and affiliates to further their change objectives, whether in gender equality, labor rights, wages, tax, or public spending.

As the organization knows, the extent of its success came as a surprise: Oxfam certainly aimed to do good work, but did not necessarily to aspire to thought leadership or a global podium on the topic of inequality. Looking back, several factors contributed most strongly to success: the use of ‘killer statistics,’ a strategic combination of high-quality research and media work, and the role of Oxfam International’s executive director at Davos itself. The external environment was ready, and the research was deeply credible. Underpinning these, at the start of the process, Oxfam Great Britain’s then-head of research was ahead of the curve in thinking about inequality. Knowing this, Oxfam management funded his proposal for further research. A small team, working somewhat under the radar, was responsible for the original breakthrough moment. Since then, a much larger team, including staff from research, public engagement (including communications), fundraising, and advocacy and campaigns, prepares for Davos each year.

The case study sounds several cautionary notes about Oxfam and the future of its thought leadership on inequality:

Acknowledgement has grown that Oxfam cannot use the technique of ‘killer stats’ forever: media interest will wane, and the organization risks losing (“squandering,” per the evaluator) the global podium it unexpectedly won and has subsequently maintained.

If Oxfam is to translate its global thought leadership into concrete actions that affect people’s lives, it should ‘focus on linking the Davos moment’ to national contexts, and ‘create space and opportunity for country teams and affiliates to further their national and regional change objectives...ensuring that Oxfam’s thought leadership has the potential to drive transformative change at national levels.’ Going further, the evaluator suggests that the translation from global to national “relates to the long-term work of establishing inequality as *the key issue* that country teams are actively working to address.” (Kumar, 2018: 43-46 emphasis added)

A significant part of the confederation is now engaged in negotiations over Davos report content and strategy. Whether this will ultimately prove positive or negative is uncertain. The internal process will be more difficult, but it may be more useful and relevant for Oxfam teams in advancing their own national level work.

### **Oxfam’s credibility resides at a four-way intersection**

Oxfam is indebted to the individuals and small teams who have pursued topics to the point that they are now recognized as thought leadership: their thinking and foresight, research and persistence, all merit recognition and investment. At the same time, the organization must acknowledge that its credibility for thought leadership resides not solely in the offices of solitary researchers, but at the intersection where Oxfam comes together with communities, partners, and others to act, and to generate knowledge, ideas, and evidence.

The *junction of theory and practice* is a tremendous asset. For example, “Oxfam’s position at the confluence of programming, research and campaigning provides opportunities for unique and meaningful, pragmatic thought leadership.” (Maes and Zaremba, 2019: 36) While not all thought leadership will be at the scale of inequality at Davos, the potential to better marry Oxfam program evidence with campaigns and advocacy work remains largely untapped.

The *junction of Oxfam and others* is equally important. One change goal report expressed this clearly in its citation of an evaluation finding that “in terms of added value...ACCRA is: a process facilitator in the collective development of understanding, knowledge and solutions on gender-sensitive, people-centered climate change planning ...[and] an emerging international thought leader on how to integrate jointly developed technical innovations and relational agency between sectors and stakeholders to tackle nexus climate change.” (Twigg, et al., 2018: 35)

ACCRA is one of the few, and perhaps the only, examples from the evidence set that demonstrates Oxfam’s ‘good citizenship’ in this arena: support to others to carry forward their own thought leadership. The two cases in the evidence set are generally silent on the contributions of others to Oxfam’s thought leadership and, with the notable exception of tool use in WE-Care, on the foundation of practical evidence underpinning it.

“It is not easy for Oxfam to know which of its intellectual work...has the potential to establish itself as thought leadership...which makes it hard to provide early support. Oxfam needs to better recognize...emerging thought leadership within the organization, or better understand the ‘demand’ (i.e. the targets) for thought leadership (where thought leadership is most needed), as well as establish key mechanisms to support thought leadership, so that it continues to flourish, either inside or outside the boundaries of the organization.” (Sutton and Guijt, 2017: 2, cited in Maes, and Zaremba, 2019: 58) The organization’s future ambitions must acknowledge that its position as a knowledge-generator, much less as a thought leader, exists only in relationship to its partners, allies, and the communities they jointly serve. Its credibility derives from these relationships, and from the practical evidence they jointly create.

## **Emerging opportunities**

The change goal reports discuss fair taxation as an instance where Oxfam may be in the process of developing thought leadership (Kumar, 2018: 12), and political capture as an instance where it may have potential to achieve thought leadership (Roper, 2018: 43). Another instance where Oxfam has exercised thought leadership is in the responsible use of program data. We include a brief discussion here (acknowledging that we went outside our standard evidence set to gather the information) in part because the example demonstrates that thought leadership can develop in numerous ways.

Oxfam was the first international NGO to create a Responsible Program Data Policy, which it did in 2015. Its point of departure was a rights-based approach, which posited that Oxfam’s responsibility is to treat the data it collects with respect, and uphold the rights of the people whom data is about. As responsible data policies began to take root in more organizations across the sector, Oxfam made its own policy available online, along with a Responsible Data Training Pack. The policy has become a common reference point, and several agencies have adapted it as the basis for their own. The Responsible Data Training pack is widely recognized

as promoting a considered, contextually appropriate approach to practical applications: with almost 15,000 downloads, it is the second-most downloaded resource on Policy and Practice. Further, Oxfam leveraged debates about compliance to ensure approaches are just as much about upholding rights and cultures as a matter of ethical principle.

Oxfam's decentralized structure prioritizes the discretion and decision-making power of country teams and affiliates, which means that doing something as challenging as developing secure data collection mechanisms across the confederation does not come easily. In future, Oxfam needs to establish clear plans to make progress in our implementation.

### **Who does Oxfam lead?**

Thought leadership, as defined above, cannot be claimed but must be granted by others. The evidence set mentions that, in the case of WE-Care, Oxfam's work has influenced the thinking and practice of groups ranging from the global (UN High Level Panel on WEE) to the local (WROs), from governments to the private sector, from researchers (such as IDS) to gatherings of academics (such as the conference of feminist economics). In the case of inequality, and in addition to the groups already mentioned, Oxfam has been invited to participate in various G7 and UN events (in one, the IMF acknowledged the organization's influence) and to speak with leaders of Canada, Rwanda, Norway, Spain, and more. (Nowhere does the evidence state that these or others have called Oxfam a thought leader.)

However, the universe of those whom Oxfam would wish to influence is much larger. Opinion gatekeepers in communities, influencers in social networks, bloggers, wide swaths of society in the countries where Oxfam works: these and more have access to a vast array of information, knowledge, and ideas on topics such as inequality and women's unpaid labor. Do they choose Oxfam as a thought leader? The evidence set provides little information about Oxfam trying, failing, or succeeding to be perceived as a thought leader (or to act as a supportive thought follower, for that matter) among these groups. Nonetheless, Oxfam acknowledges that these actors already play (and will continue to play) roles in identifying thought leaders and serving as an echo chamber for future arguments that Oxfam will want to make.

### **Absence of evidence and evidence of absence**

The change goal reports and the Sutton and Guijt paper do not analyze instances where Oxfam expressed an ambition to be a thought leader but failed. They do not identify opportunities that Oxfam may have missed to exercise thought leadership. The change goal evaluators do not present documented examples, nor any anecdotal information, on where Oxfam supported partners or others to exercise thought leadership, with Oxfam in a 'thought follower' role (exception of ACCRA noted above). The Sutton & Guijt paper offer several instances in which Oxfam convened and connected with others, not so much in a follower role but as a co-creator of ideas and knowledge-based leadership (water governance in Tajikistan, for example; Sutton and Guijt, 2017: 8).

To be fair, evaluators were not asked to document these phenomena in the change goal reports. Said one, "It is very difficult to assess Oxfam's transformative influence on the resilience...sector as a whole...This was usually beyond the scope of project and programme

documentation, which tended to focus on implementation results and did not capture learning as a multi-scalar, continuous process. The same applies to understanding the added value of Oxfam's technical expertise, thought leadership, and access to learning and knowledge..." (Twigg, et al., 2018: 72)

## **Facing the future**

Oxfam's position at the intersection of knowledge and practice, of self and others, gives it a particular vantage point: with it come both opportunities and responsibilities. The thought leadership that Oxfam exercises is not the same as that proffered by think tanks, universities or private companies; its on-the-ground programs and partnerships add voice, lived experience, and experimentation to enrich and inform any topic. The organization and its alliances, operating from the global to the very local, have the perspective (and, if well strategized, the stature) to push back on established hierarchies that define whose knowledge and ideas have value in the world. Oxfam has both latitude and responsibility to think creatively and rigorously about what it means to be a thought leader from the position that it occupies.

Clearly, Oxfam's ambition should not be to take on thought leadership in all its work arenas; strategic choices have to be made about where to invest. "It is not easy for Oxfam to know which of its intellectual work...has the potential to establish itself as thought leadership, and even if it does, whether it serves the overall mission of the organization. This makes it hard to provide early support, unless some clear and transparent criteria would be established as to what to support." (Maes, and Zaremba, 2019: 57) While it would be a mistake to outline a heavy process around thought leadership, transparency in the criteria for choices, and shared deliberation in decisions and posterior investments, would increase confidence in, support for, and use of the work.

With more deliberate discussions to identify priorities—and shared investments—Oxfam could honestly assess its most effective role in each instance. In some cases, the organization's accretion of an evidence base (operationalizing theoretical concepts, applying them to programming, and fostering the emergence of thought leadership) will be most appropriate, and investments can be made accordingly. In others, Oxfam will find that its peers, partners and/or collaborators/allies should step into thought leadership, and the organization's (perhaps unsung) role will be to convene and connect. One change goal report notes "...there was little in any of the documentation or indeed that emerged from a scan of the wider 'Food Systems' discourse that indicated an acceptance of Oxfam's role as a 'thought leader' in the field of Sustainable Food." The evaluator then pivoted to reflect that 'Perhaps Oxfam's work with partners, allies and others is developing thought leadership in other institutions – [though of course] this is difficult to gauge and to attribute to Oxfam.'" (Maes, and Zaremba, 2019: 38) By seeking opportunities to support peers, partners, allies or collaborators (think tanks, journalists) to emerge as thought leaders, Oxfam may simultaneously step more fully into its responsibilities as a knowledge citizen—responsibilities that include a systematic and transparent intention to amplify voices (Southern, female, young, poor, and more) that are not currently privileged on national and global stages.

Deliberate steps to shoulder these responsibilities should be embedded in Oxfam's organizational behavior. Continuing Oxfam's work to articulate thought leadership about INGO thought leadership (as in Sutton and Guijt, 2017) would result in a valuable first contribution to the development sector, and certainly to Oxfam itself. It could guide the organization on how it can invest, how it can best play its chosen role, and how it can exit, relinquish, or turn over thought leadership.

In sum, Oxfam has opportunities to recognize and support emerging thought leadership in itself and others, and to make deliberate choices on what types of knowledge should be elevated. With the recognized value of its position at the intersection of theory and practice, Oxfam can deliberately work to change the hierarchies of whose knowledge, ideas, and opinions are valued in the world, and promote alternative agendas consistently over time.

## G. IMPACT AT SCALE

### Oxfam's aspirations and definitions

Oxfam's Strategic Plan document (OSP 2013-19) does not explicitly discuss an aspiration to achieve impact at scale, but the notion is implied throughout the six programmatic goals it sets forth. In the words of one evaluator, "The ambitious goals set out... *demand* strategies that achieve impact at scale." (Maes, and Zaremba, 2019: 43, emphasis added) Among the OSP's operational goals, the first describes a WIN: within this, the document suggests formulating 'six-year national influencing scale-up plans for each country team and includ[ing] influencing components into all programs for impact at greater scale.' (OSP, 2013: 23). The Oxfam Program Framework (2014) suggests that scale up should be an element of all projects' design and exit strategy, but offers no clear justification, nor any concrete how-to advice. No documents in our evidence set suggest that Oxfam as a whole has developed a framework or guidance for knowing when and how to take an innovation to scale, whether the innovation in question is an initiative or service to be expanded across a population, or is a policy or practice to be embedded in a system, or both.

#### Evidence Set

1. Phase I Change Goal reports, especially: Sustainable Food, Resilience, Financing for Development
2. Baksi and Tennyson *Pathways to Transformative Partnering* [PBA, 2018]

Two interpretations of the phrase 'impact at scale' co-exist within Oxfam. The first is scaling up an innovation (a project, practice, product) to reach greater numbers of people. The second is influencing systems and structures to make change: because the systems affect large populations, so too do changes to the system.

One can argue that these two interpretations juxtapose a *what* (expanding something to reach more people) and a *how* (influencing systems to change). As such, a parallel set of definitions<sup>1</sup>

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<sup>1</sup> Found in basic scale up models such as that developed by ExpandNet/WHO for health innovations; see <http://www.expandnet.net/>

is helpful when examining evidence of Oxfam's impact at scale. *Horizontal scale up* refers to *extending* an innovation across a population (or some segment thereof): more people have access to the project, practice, or product. *Vertical scale up* refers to *embedding* an innovation into the policies, norms, or protocols of a system (such as a government department, a health or education system, a business or an organization): the innovation becomes standard practice for the system, and thus for the people who use or are affected by it. Innovations that are scaled horizontally and vertically are likely to achieve the greatest impact for the greatest number.

## **Oxfam's practice**

The complexity of Oxfam's efforts to achieve impact at scale is hinted at in the Sustainable Food change goal report. "While almost all programmes reviewed expressed ambition to have an impact at scale, this was interpreted in different ways. Some...set out goals in terms of households while others measure themselves by the number of companies in which the programmes operate. There are still a number of programmes that base their scaling strategy on trialing and piloting methodologies, systematizing learning and then using this as evidence to inflict wider policy or market changes which are intended to have impact at scale. For other[s], the starting point is influencing, where evidence is assimilated from a wide range of sources and not necessarily bound to any particular programme." (Maes, and Zaremba, 2019: 6)

The evidence set's clearest cases of Oxfam achieving impact at scale are summarized here, and are followed by a discussion of common themes or limitations that Oxfam may choose to tackle in its upcoming OSP development process.

### **A country program set up for scale in an evolving context**

In the Financing for Development change goal report, a detailed case study of Oxfam in Ghana illustrates impact via influence at the systems level, and describes how the Oxfam country program's long-term investment in fiscal justice has led to ongoing, national impact. The evaluator deems the Ghana case to be the best example of an Oxfam program "that was achieving large-scale impacts in relation to financing for development and fiscal justice work...based on the significant amounts of revenue raised or (re) allocated and invested in pro-poor sectors...also notable given outcomes have been achieved due to a strategic mix of interventions across all of the areas highlighted as critical for Oxfam under Change Goal 6: tax, budget and essential services."

Beginning with an interest in extractive industries, the Oxfam program has come to influence public financial management writ large, with effects on: essential services (health, education), investments in agriculture, fiscal oversight, the national debate on inequality, and even the terms of the IMF bailout (including policies to protect social investments and attach safeguards to national financial institutions). Oxfam in Ghana did not foresee all the details of this trajectory, but it did begin its journey with two crucial assets. The first was an expansive view of what public finance management entails, and the second was an early study of context, issues, and strategic entry points.

Thus, Oxfam positioned itself to seize unanticipated opportunities, choose specialist partners, form useful alliances, deploy campaigns and other influencing tactics, and undertake or support

high-quality research (including evidence from Oxfam’s direct delivery education models): all of these led Oxfam to gain seats at several national negotiating tables. Today, the Ghana program is in “an enviable position, having developed substantial technical expertise, a broad partner portfolio in the right areas, and being a leader in the field.”

The Ghana experience may not lend itself to becoming a model *per se*, because the focus is not on scaling something but on *preparing organizationally to create impact at scale*. However, Oxfam can learn from the country program’s fundamentals, which include:

- An integrated approach to programming, a deliberate resistance to programmatic siloes, and an ongoing team effort to drive change in an integrated manner.
- A commitment to work along the ‘continuum of change’ in which the local and national are connected in a continuous loop: staff follow issues and outcomes from budget allocation to expenditure, and from revenue-raising to spending, and back again.
- A deep investment of time and resources in understanding the context, allowing Oxfam in Ghana to see and respond to opportunities as they emerge (and a willingness to boldly engage, as with the IMF, when opportunity opens).
- Linking strategic choices over a decade, allowing early commitments (to education, health, agriculture, extractives) to evolve alongside a commitment to fiscal justice, and to adapt to changes in context and within Oxfam.
- Investing strategically in formal and informal relationships, at local and national levels, with non-governmental and governmental entities.

(all above from Kumar, 2018: 47-53)

### **A program that planned for scale via direct delivery *and* integration**

The R4 program built farmer resilience to climate shocks via a suite of risk management strategies, and achieved impact at scale via direct delivery and influencing. In Ethiopia (one of several R4 countries), Oxfam helped form public-private-people partnerships to develop new ways of financing and sustaining risk mitigation tools, including risk insurance policies that farmers ‘bought’ with labor. Oxfam began R4 with context and gender analyses, and invested in piloting and learning from on-the-ground service delivery: it pushed the resulting evidence into public, non-profit and private sector spaces via a relentless flow of information *cum* influencing. From the design phase, staff aimed for integration of the R4 model into government policies and systems, and ultimately succeeded when R4 was absorbed into Ethiopia’s Productive Safety Net Programme for millions of poor farmers.

The R4 experience in Ethiopia offers several positive means and ends from which Oxfam can learn. These include:

- R4 worked to build trust and capitalize on a relatively enabling political and policy environment in Ethiopia to promote a case for participatory, pro-poor integrated risk management approaches, and successfully integrated R4 into the delivery of the government’s Productive Safety Net Programme.

- High-impact partnerships were essential to R4's influencing reach and ability to scale. R4 leveraged the respective strengths of its partners in the public and private sector, climate experts, and community institutions.
- Oxfam and the World Food Programme created the Index Insurance Working Group Platform for major stakeholders to share experiences, build capacity, and work through challenges in the agricultural insurance sector. R4 partners deemed this platform an essential support as the public and private sectors developed in-country capacity on index insurance.
- A communications strategy that increased industry awareness of evidence-based success, and allowed the program team to influence actors at global, national and local levels.

One Oxfam report attributed R4's success to embedding team members within government committees, particularly the Ministry of Agriculture, despite the Ethiopian government's resistance to working with NGOs. (Twigg, et al., 2018: 14) As such, R4 may also offer a case for Oxfam to interrogate the trade-offs that arise when it works within government structures to influence government policy. Undiscussed in our evidence were potential risks: does an 'embedded' Oxfam diminish its future latitude to influence, criticize, or amend? Does Oxfam risk its credibility with non-government groups when it works within government structures to influence government policy? (All preceding drawn from Maes, and Zaremba, 2019: 34, 45; Twigg, et al., 2018: 14-8, 30-5, 50.) (See Influencing section for further discussion of this and similar risks.)

### **SfC achieves horizontal scale; vertical change is debated**

The SfC model is a proven way for women (and men) to gain a degree of financial security. The direct delivery methodology may also create space for women's collective action for mutual benefit. SfC is popular, effective, easy to replicate, and lends itself to relatively rapid expansion to reach great numbers of people.

One change goal report's analysis of sustainable impact and scale discusses the value of SfC expansion at length. Drawing on an evaluation from Mali, it says in part, "The SfC initiative is demonstrating results at scale but it is crucial to keep in mind that these results are within the paradigms of 'innovation' and 'empowerment'.... [SfC] is innovative in being largely self-governing and extending to communities that were previously financially marginalized demonstrating a degree of fiscal flexibility...[A]long with innovation, SfC has enabled empowerment at scale. Primarily, this is because almost all the 700,000 members of savings groups are women who are able to gain a significant measure of financial independence as a result." (Twigg, et al., 2018: 20-1)

Clearly, SfC is reaching horizontal scale: of the hundreds of thousands of members cited above, a full half-million are in Mali alone. Is SfC creating vertical change—that is, change to systems and structures, such as the invisible social structures that define gender inequality? The team differed in the conclusions we felt we could draw from the limited slice of information in the change goal reports. One team member pointed to an SfC evaluation cited in the Resilience report as indication of structural change: "[T]he initiative has helped secure agriculture land for women, identity papers and a political voice...After a decade of researching and evaluating SfC, it was hard not to see something transformative underway...In Kolondieba, where we watched a

room full of illiterate women, many of whom had no experience in public speaking prior to SfC, dominate conversations with male elected officials...one senses the potential of SfC over time when the structural barriers normally found in Malian society are removed.” (Roper, 2018: 41, cited in Twigg et al., 2018: 21)

Another team member points to a different evaluation of SfC in Mali: “Husbands, household heads, and village chiefs tend to support SfC *because it does not challenge this social structure* [id est subordination of women, emphasis added].” (Boyer, 2018: 40, cited in Twigg, et al., 2018: 57)

Missing from the debate, however, is information on how evaluators defined ‘empowerment’ and ‘innovation;’ whether SfC implementers intended to change social norms surrounding gender inequality (and completed gender/power analyses, theories of change, and MEL frames to support the intent); and if Oxfam intended to achieve vertical scale. Does the organization risk mistaking broad horizontal scale, and women’s undeniable but incremental gains, for the type of transformational change required to overcome poverty and achieve women’s equality? (See Women’s Rights section for further discussion on SfC.)

### **Aiming, but failing, to achieve scale**

The evidence set contains a single description of an Oxfam program that aimed to achieve scale but that failed to make the adaptive changes needed within a complex, deteriorating environment. The CRECE (GROW) Campaign in Nicaragua occurred as the government became increasingly repressive and opposed to CSOs and movements, despite the promises and platforms that brought it to power. For many, the narrowing democratic space, and the government’s apparent loss of interest in small-scale farmers, land rights, and land redistribution, came as a surprise. Speaking up for these causes and criticizing the government became risky.

CRECE’s original campaign goals were to ensure that existing laws (on land distribution, for instance) were implemented, but the campaign did not anticipate the changing power dynamics, and the government’s unwillingness to enact its own policies. The campaign shifted (i) from national government to local authorities as a target for action; (ii) from a strong focus on advocacy to one of awareness-raising and training women in leadership, legal rights, and improved agricultural techniques; and (iii) from CSOs and movements as protagonists, to the *campesinas* themselves.

These changes meant that the CRECE alliance would approach original campaign goals via a more indirect route, over a longer period of time. Ultimately, the changed campaign yielded some impressive but limited successes at local levels. Systemic change at scale did not follow. (Maes, and Zaremba, 2019: 58-60)

Why? Clearly the deteriorating environment played a major role, and CRECE may not have succeeded in reaching its original influencing goals at national scale solely for this reason. However, the CRECE alliance under Oxfam leadership failed to redesign its theory of change to account for the shifting environment. In a complex and constantly changing world, initial analyses always require periodic updating. Analyses of contexts, power relations, assumptions,

trends and issues must be ongoing, with mechanisms to adapt strategies and programs across the program cycle. CRECE's lapse meant the resulting campaign was dispersed, without clear strategies to link and aggregate local achievements and wins into larger scale, more transformational changes. (Maes, and Zaremba, 2019: 29)

## **Facing the future**

The discussions above point to three areas that may be important for Oxfam's future attempts to achieve impact at scale.

### **Impact at scale is no accident. It must be planned and re-planned**

In the Ghana country program, Oxfam began with the intention of large scale, and it undertook early analyses and/or developed a theory of change to support that intention. The R4 project created a theory of change (the timing of which was not clear in the evidence set) and did mid-stream gender analyses. In Nicaragua, the CRECE campaign did not update its original theory of change despite rather radical strategy shifts: this was one reason for its failure to achieve intended impact.

The Ghana case also illustrates the need to prepare organizationally to pursue impact at scale: it mentions a deliberate resistance to internal silos, and a commitment to long-term aims: "If Oxfam is interested in impact at scale, tenacious, long-term investment (which implies 20+ years) is often essential." (Kumar, 2018: 65) Ghana and R4 likewise illustrate the value of careful selection of partners, and attention to intervening at and linking several levels, to achieve impact at scale.

One change goal report examines planning for scale at a higher level: that of Oxfam's programs in the sustainable food change goal. "The more influential programmes set out to initiate changes at a systemic level or in the power dynamics and institutions governing how poor people interact with food systems. The degree to which these programmes achieved intended or unintended outcomes and impacts contributing to the overall Sustainable Food System change goal varied greatly, and depended on many factors such as breadth of ambition, extent and effectiveness of the theory of change developed around the programmes, ability to mobilise and sustain external support, the contexts and also, to some degree, operational issues internal to Oxfam." (Maes, and Zaremba, 2019: 19)

### **Evidence suggests that direct delivery *and* influencing contribute to impact at scale**

In Ghana, Oxfam piloted educational models whose success led to government adoption, which in turn fed Oxfam's credibility in the realms of services and financing. In Mali, Oxfam partners directly delivered the SfC model. And in Ethiopia, R4 piloted, experimented with, and ultimately delivered a risk-reduction insurance product for poor farmers. The Sustainable Food change goal report states, "Direct implementation programs sometimes play a role in innovating, testing, trialing and developing effective approaches to attaining sustainability in food systems. They can also be invaluable sources of evidence for policy changes, means of demonstrating the effectiveness of certain approaches, and entry points for scaling up." (Maes, and Zaremba, 2019: 19) Even as Oxfam is shifting away from direct delivery in favor of influencing, it seems

clear that achieving impact at scale can at times involve scaling up *something*—some project, product, or practice—delivered by Oxfam or another entity, and using evidence of its effectiveness to leverage its expansion and/or its adoption into systems.

As Oxfam considers impact at scale in the next OSP, a step back from dichotomous thinking—direct delivery or influencing, scale as large numbers of people or scale as influenced systems—is in order, because all are factors in success. The central questions become, how can Oxfam set up its ways of working and its program designs with the possible end of scale in mind? Not everything Oxfam does will merit scaling, yet any innovation that proves scale-worthy must be set up for this eventuality.

### **Unclear borders limit ambition and achievement**

Finally, the concept of ‘impact at scale’ remains too undefined—at least, as reflected in this evidence set—to bear the weight of Oxfam’s ambitions. The change goal reports all cross the unmarked borders between impact at scale and other Oxfam approaches: influencing, thought leadership, and (to a lesser extent) partnership. They conflate impact at scale with other amoebic concepts: in the SfC case, impact at scale appears to be counted as gains in the (undefined) realms of innovation and empowerment (Maes, and Zaremba, 2019: 23), and the Resilience report merges impact at scale with a discussion of transformative change (Twigg, et al., 2018: 67, 73) No change goal report, nor any Oxfam foundational document in our evidence set, offers guidance or criteria for determining what is worth taking to scale.

The apparent fuzziness is problematic not in itself, but as it constitutes an impediment to knowing how to plan for, implement, and achieve the depth and breadth of change that Oxfam seeks. We close with three citations from the evidence set that encompass the conundrum:

Oxfam projects have attempted to achieve outcomes in core resilience domains (e.g. empowerment, innovation and policy shifts) at scale, but this key pillar of enhancing transformative capacity needs more attention in programming. Across the sample of projects that we analysed, only a relatively small number demonstrated that they were covering nationally significant numbers of [people] or delivering benefits at a scale that could be compared to large government led schemes and policies... Oxfam needs to consider issues of scale more concretely across its programme. This could imply replicating models of Oxfam projects that are delivering change at lower scales of governance but amplifying this through uptake into policies. It could also imply Oxfam involvement in technical assistance programmes seeking to work directly with government systems already operating at scale with vulnerable populations to make them more effective. (Twigg, et al., 2018: 72-3)

Oxfam’s strength lies not in innovation and new ways of doing things, this is something Oxfam can secure or gain through partnering with others who are innovating completely new solutions. There are many small projects, private initiatives etc. underway in the Horn, East, and Central Africa region with a wide range of resourcing potential. What is lacking is how to take good ideas & solutions that work at smaller or local scale and scale them up so that whole system transformation takes place—this scaling up and creating enabling policy/political environment is Oxfam’s great strength. (Baksi and Tennyson, 2018: 31)

While programmes and campaigns are contributing towards systemic changes and shifts in the balance of power influencing food security and agriculturally based livelihoods, the extent to which these outcomes are contributing towards a complete transformation of the food system is hard to gauge. The Sustainable Food Change Goal, in its breadth and spread, seemingly encompasses such a large number of issues and areas which are difficult to synthesise into a focused direction. From land rights to financial flows, trade policies to supply chain practices, changes in the many arenas where Oxfam has been working are happening, but often without a visible impact at scale on the people whom Oxfam seeks to support... (Maes, and Zaremba, 2019: 7)

## Knowledge and learning reflections

Pathways to scale are not automatic for all Oxfam initiatives: not all will be worthy of scaling, but all should be prepared for scaling. Foundation stones toward building that state of preparation are:

- Knowing how to make systematic plans and design programs for scale
- Understanding and identifying partnerships able to bring a small but compelling initiative to scale
- Establishing learning and assessment mechanisms that will support impact at scale.

Being able to systematically plan all its interventions with scale in mind will require Oxfam to overcome its knowledge and skills gap in program design with that objective. The organization will need to identify pathways to scale: this will include learning to engage with partners that have the appropriate capacities and access to grow small initiatives to the scope and reach that would enable impact on the lives of men and women from local to national (and even regional) levels. Oxfam will have to establish knowledge objectives that promote learning and adapting for scale, processes and mechanisms that will reveal insights about how, when, and what to scale. Such preparation can support transparent choices for Oxfam's best work.

## H. KNOWLEDGE AND LEARNING

### Oxfam's ambitions and definitions

The OSP 2013-19, *The Power of People against Poverty*, clearly recognizes knowledge as a fundamental component in its theory of change, an ingredient that contributes to achieving its objectives. Two years later, Oxfam began an internal change process (Oxfam2020) to continue to evolve its ability to fight poverty and injustice, citing knowledge as one of three drivers.

#### Evidence Set

1. Change Goal reports, all
2. Sanchez de Ocaña, *Knowledge Hub evaluation* (unpublished, 2015)
3. Asia network evaluation
4. Global MEL Leads and Regional Program Quality Leads contribution paper.

Oxfam expressed its ambition of becoming a knowledge-based organization in this way: "A modern organization is about knowledge and how we accumulate it and how we share it amongst each other and the world." (Oxfam, 2015: 4. Internal) This ambition comes with the

demand that knowledge and learning be used internally to implement better quality and more impactful programs (and more), and externally to better position Oxfam to influence change.

This proposition, articulated in the OSP and reinforced by O2020, that Oxfam has a particular contribution to make by generating, capturing, using and re-using, and sharing knowledge, is confirmed throughout the change goal reports. Oxfam enjoys a recognized value add with its ability to bring together research and on-the-ground experience to strengthen its advocacy and policy work. (Maes, and Zaremba, 2019: 36; Kumar, 2018: 36)

In other words, Oxfam's knowledge ambition is broad and deep: it permeates programs, countries, regions, affiliates; crosses functions and departments; and extends outside the organization.

### **Toward fulfilling the ambition**

With this ambition, Oxfam has made various investments in its ability to generate knowledge and support learning.

On the regional level, learning labs are formed to co-create knowledge and solutions: in LAC, program teams are driving new thematic 'labs' that gather CSOs, community groups, active citizens, and Oxfam staff to explore challenging policy issues, new ways of working, and the effectiveness of new media in social change work. In Asia region, the ability to function as a knowledge-based organization (one that continuously learns and adapts, and contributes knowledge in the world) is an explicit lever of regional strategy and a concerted investment. In all regions, program quality staff, business development staff, MEL staff, gender justice staff, and more are organizing and functioning as communities of practice or practitioner networks that exchange and learn together.

Oxfam's Southern affiliates—in Mexico, India, and other countries—are developing new research muscle around country-specific topics, adding depth and perspective to the confederation's global voice (see, for example, Oxfam Mexico's [knowledge page](#) and Oxfam India's [knowledge hub page](#)). As a cross-cutting function, research has enjoyed consistent investment, and posts are located across affiliates, regions and occasionally in countries (usually associated with particular projects). A little over one-quarter of all research posts are in the global South. Research colleagues are organized in a confederation wide network, collaborating across research agendas and in specific initiatives (such as 'bootcamps') to sharpen research skills. "Today, few Oxfam learning documents fail to highlight high quality research as an essential part of a successful strategy." (Kumar, 2018: 36)

Oxfam has invested in platforms and processes that support knowledge and learning through: better knowledge management (for example, Compass and Box); easier exchange and collaboration among staff (Workplace); easier self-learning (Learning at Oxfam); and more sharing externally (Policy & Practice websites; blogs such as From Poverty to Power, the Gender and Development journal). It has created tools and processes for planning and reporting program achievements that have supported regions (LAC, Asia) to analyze results, challenges and investments, using them as opportunities for learning and adaptation (Program Quality Reviews, the more recent One Program Reports).

Perhaps Oxfam's most concerted effort to date is its five global knowledge hubs and a few regional thematic knowledge networks, which help staff work more collaboratively, make connections, create opportunities to generate and exchange specific knowledge. (Sanchez de Ocaña, 2015:1) Later evaluations reiterated the value of such networks. (Twigg, et al., 2018: 7; Roper, 2018: 44) "Staff recognise knowledge hubs' support as useful for their work. By aligning program policy—through thematic frameworks—they have helped articulate Oxfam's stance on issues that matter to Oxfam, and where a lack of a shared understanding was slowing Oxfam down (for instance on Resilience, or Fiscal Justice, or norm and attitude change in VAWG work): 'two years ago we couldn't even agree on the definition of women's economic empowerment. So when there were opportunities to partner, we couldn't do it as a confederation. Now we're at a very different stage'. It has also multiplied opportunities for external engagement, and helped Oxfam be more outspoken on certain issues than before, like civic space." (Sanchez de Ocaña, 2015:1)

To produce better-quality evidence from its programming practice, Oxfam has advanced MEL processes with the creation of a Common Approach to MEL and Social Accountability (CAMSA) framework, allowing teams to coalesce around efforts to improve the quality of Oxfam's M&E information for learning. More recent initiatives, such as the One Program Report, supporting adaptive management, and the development of the MEL colleagues' Impact First vision, have shifted the MEL function towards a more strategic approach to learning for future programs.

Oxfam created a Knowledge Fund and several affiliate-supported Innovation Funds to stimulate the better use of existing knowledge, to generate new knowledge, and to support the use of innovation practices and approaches in design and implementation. In the example of the Knowledge Fund, approximately €800,000 were disbursed over the first three years. Perhaps a better indication of the interest, demand and hunger for such funding for knowledge and learning is the fact that staff generated proposals requesting a total of €7,000,000 over that same period. This interest in creating and sharing knowledge, concentrated especially in the areas of gender justice and humanitarian response, is both astounding and heartening. In parallel, affiliate Innovation Funds disbursed funding to stimulate Oxfam colleagues and their partners, beyond affiliate boundaries, to adapt and develop new approaches, new thematic areas, and new funding modalities. In some cases—Myanmar—the work funded internally was then successfully used to garner external funding.

In sum, during the OSP period now ending, Oxfam has taken numerous actions to live its ambition of being a knowledge-based organization. Yet much remains for the new strategic plan:

In general, Oxfam's efforts are not as inclusive as they should be: staff, particularly in countries and Southern affiliates, struggle to engage consistently in global knowledge and learning processes, given constraints on resources and time, and processes that are not as inclusive as they can be. The organization needs to be more conscious of not replicating some historic imbalances in whose knowledge is valued and who sets the agenda for investment in knowledge and learning.

The knowledge networks (whether hubs, practitioner networks, communities of practice or other knowledge-exchange groups) have room to grow toward strength and diversity, greater clarity of

purpose, and the flexibility to form and dissolve not by central decision but by purpose, need, and value-add for participants.

Oxfam must concertededly and consistently extend beyond its institutional walls, starting with partners, so it can learn with and from others, and challenge power imbalances in whose knowledge is valued and accepted—not only within Oxfam but in the wider world.

## **Oxfam practice**

As could be expected, the evidence set indicates that knowledge and learning initiatives (and resources invested) varied from program to program, region to region, and across functions. Variation was also a function of focus (individual program or cross-organizational), intent, and target audience. The change goal reports provide some evidence of Oxfam’s intention to work on knowledge and learning, with some successes and many challenges.

### **Knowledge and learning within programs**

The change goal reports offer examples of knowledge and learning initiatives at program level. What is less evident is how these initiatives were mainstreamed, and how lessons were carried to other parts of Oxfam or externally, to add value to the work of others. Below are some examples of initiatives within program boundaries.

#### *Research*

Investments in technical or specialized research are discussed in other sections of this report: research used in fiscal justice and extractive industries are cited as examples in more detail in the Influencing section. But social research, and Southern-grounded research, also add value and warrant mention. “Oxfam’s (evidence-based) *social* research is a widely recognized strength it brings to campaigns and advocacy efforts.” (Maes, and Zaremba, 2019: 34) New research by Oxfam staff in LAC on the social norms that underpin VAWG/GBV was recently published.<sup>2</sup> And research undertaken by specialist national institutions (such as in Ghana, Vietnam) is becoming more integral to country-level work across many Oxfam-supported program themes.

#### *Real-Time-Reviews*

Oxfam’s RTRs are learning exercises in its humanitarian MEAL system. Undertaken at six to eight weeks into every humanitarian response, RTRs assess dimensions including quality, timeliness, gender analysis and more. They provide valuable, real-time insights, and are intended to facilitate changes in the programs reviewed. In recent years, the organization has undertaken analytical exercises to identify trends across RTRs as well.

Oxfam found several recurring problems in the RTRs, which were echoed in the mid-Strategy review of 2016 and the meta-RTR of 2017. “A number of interviewees added to this by

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<sup>2</sup> Ruiz, Damaris and Garrido, Anabel (2018) [Breaking the Mould: changing belief systems and gender norms to eliminate violence against women in Latin America and the Caribbean](#). Oxfam International, July.

expressing their frustration at an apparent resistance in the organisation to systematic learning, and a continued dependency on learning from experience only.” (Knox-Peebles, et al., 2108: 31) RTRs are positive for having learning loops intended for program adaptation, but evidence suggests that their scope can be limiting and they can miss important elements to achieve broader impact: the current RTR tool does not, for example, explore working with women’s organizations or with states. (Knox-Peebles, et al., 2018: 30) Oxfam has only recently made a push to act on the problem areas highlighted in the meta-RTRs and related documents, without which the learning loop would remain incomplete.

### *Working with youth*

The Right to be Heard report discusses Oxfam’s intentions, and shortfalls, in learning to work effectively with youth, and notes the contribution of a learning and reflection process through the Youth Active Citizenship community of practice. “Oxfam has been working to foster the participation of youth for decades but intensified that work, under the strategic plan in order to foster youth capacity as active citizens and change agents.” The report includes a case study that details the ambitious My Rights My Voice, implemented over four years in Afghanistan, Georgia, Mali, Nepal, Niger, Pakistan, Tanzania and Vietnam, and the creative youth innovation fund in LAC. “The thinking that the Youth Active Citizenship [community of practice] is doing...potentially has a broader applicability to Oxfam’s work with other marginalized groups. Cross-generational work, evident in My Rights My Voice, has a particular potential to add to the social capital in communities, rejuvenate change efforts with fresh ideas and fresh voices, while building on the experience of seasoned community organizers and activists.” (Roper, 2018: 16)

### *GROW Campaign*

Oxfam’s GROW campaign (2011-15) aimed to create a more just and sustainable food system in which everyone has enough to eat. It was the first campaign to link programmatic work on agriculture around the world, with campaigns in 40 countries. In Nicaragua, the CRECE (GROW) Campaign had to modify its national influencing strategy because of changing political circumstances. Notably, it abandoned the notion that change could be brought about exclusively at national level, and instead turned to exerting influence at local and provincial levels. Oxfam and partners made some changes in implementation, but did not revise the CRECE theory of change to reflect the new reality, in which objectives would be reached more indirectly and over a longer time period. The resulting campaign was dispersed, without clear strategies to link and aggregate local achievements and wins into larger scale and more transformational changes. (Maes, and Zaremba, 2019: 29; CRECE also discussed in the Impact at Scale section) The documentation of these problems is one of the few reports focused on learning from failures in the entire evidence set.

### *Learning loops in CA-MEL*

The exercise of looking back over the year to learn and improve takes place in programs and regions across Oxfam. In four countries, the Central America-Melanesia (CA-MEL) Resilience Building Program strengthened community resilience to disasters. The project team in Solomon Islands used Annual Impact Reflections, in the form of workshops with partners, to better understand contexts, reflect on what was effective, and determine how to improve

implementation to meet local people's needs. (Twigg, et al., 2018: 54) As much as CAMSA encourages exercises like this, and processes such as Program Quality Reviews and others, it isn't clear that these reflection practices occur systematically. Further, the change goal reports do not provide enough evidence that learning loops are brought to a close and used for program improvement, much less documented in a way that learning outside the boundaries of any particular program (in other programs, countries or regions, even outside Oxfam) can occur.

### **Knowledge and learning across Oxfam**

To be a fully-functioning knowledge-based organization, Oxfam will want the knowledge and learning generated within a single program, campaign, or humanitarian response to be used and applied to strengthen other programming, and to be shared further to improve the work of other functions and areas of Oxfam. The change goal reports provide limited evidence of such sharing, use and application of knowledge and learning, and no evidence that it happens systematically or consistently.

It is difficult, according to the Resilience change goal report, to assess knowledge transfer beyond the life cycle of a project or program, and certainly between programs, across countries and regions. (Twigg, et al., 2018: 79) The reports *do* provide some insights into how programs, intentionally or not, have generated or used knowledge and learning across programs.

#### *Cross-country and regional learning*

One way Oxfam seeks to amplify impact is by pursuing regional or cross-country strategies for learning and innovation. The Right to be Heard change goal report discusses four cases: AMAL (Supporting Women's Leadership in the MENA Region during Changing Times); improving petroleum governance in Ghana, Tanzania and Mozambique; marginalized workers in the ASEAN region; and the already-discussed My Rights My Voice. An evaluation of the last-named program found plenty of examples of cross-country learning events and exchanges, but little evidence of their actual effects in terms of organizational and program-level learning (van Esbroek, 2016: 39, cited in Roper, 2018: 17). In the petroleum governance program in Ghana, and in AMAL in MENA, the regional learning component was weak, partly because it is not enough to simply bring people together to learn: a strategy must be established to support the ability of staff to reflect, share, advise, accompany, and problem-solve with others across contexts, and to build on experience and knowledge in a cumulative manner. Given limited knowledge resources, it is important to establish mechanisms for learning uptake and further sharing.

#### *Learning to end violence*

According to the eVAWG/GBV report, Oxfam colleagues identified several arenas where knowledge gaps impeded good programming: lack of knowledge about what does and does not work to stop VAWG/GBV, and even less knowledge about MEL for programs that strive to change the attitudes, social norms and behaviors that perpetuate VAWG/GBV.

Early in the current OSP, the eVAWG/GBV Knowledge Hub and its network took a carefully planned, two-year learning journey, which culminated in the 2015 'Power to Prevent' learning event. Some 65 Oxfam staff, external researchers, MEL specialists, practitioners, and

academics from more than 40 countries attended the three-day gathering. The resulting learning synthesis, *Conceptual Framework on Oxfam's Approach to Changing Negative Attitudes, Social Norms and Behaviours to End VAWG/GBV*, is now a key source of orientation to and guidance for programs and evaluations (and for eVAWG/GBV report itself). (Douglas, et al., 2018: 14)

#### *Learning about taxation in Vietnam*

In Vietnam, Oxfam staff benefited from expertise across the confederation, and links to the global agenda, on the topic of taxation. Specifically, they made a deliberate investment to understand Oxfam's tax work and campaign positions, before reflecting on what among this body of learning would be most useful in the Vietnam context. (Kumar, 2018: 58) We find evidence of similar decisions to study, learn and make informed choices, in other countries in the region, and beyond Asia.

#### *South-South learning*

In the Caribbean, Oxfam has promoted South-South knowledge and learning exchange on the topic of disaster risk reduction. Evidence suggests that learning is most successful when adaptation occurs: "implementing and institutionalizing tools, methodologies and practices that have proved useful in one country and can be easily adapted in another one in the region." (Twigg, et al., 2018: 38) This is a positive example, one of several where South-South learning is used and encouraged.

#### *Evaluation processes to support cross-organizational learning*

Across the confederation, MEL colleagues conduct meta-analyses of Oxfam evaluations (as the RTRs noted above), support country-led evaluations outside affiliate boundaries, and undertake sense-making exercises such as the mid-term influencing review and the current OSP evaluation, all to support learning across geographies and programs. (Oxfam MEL colleagues review, 2018: 4) One change goal evaluator noted that, in this exercise, "the evaluations that were most instructive tended to be documents that compared experiences across issues or countries (e.g. the Coalitions Support Program in Vietnam; My Rights My Voice, Marginalized Workers in ASEAN; Governance in the Oil and Gas Sector in Ghana, Tanzania and Mozambique; and the EU-ANCEFA-Oxfam influencing around education in Africa) because they tended to bring into starker relief contextual issues and highlight effective strategies and common challenges." (Roper, 2018: 7).

#### *Progress in and obstacles to "democratizing knowledge"*

The same evaluator observed that knowledge bodies like the knowledge hubs, communities of practice, and thematic groups are, in some ways, surpassing the contributions of standard evaluations and case studies in terms of organizational, as opposed to program or project, learning. (Roper, 2018: 44-5) An external analysis of the work of knowledge hubs seems to agree: "Within Oxfam, knowledge has been seen as something that happens in a small group of experts and then gets disseminated. Whereas what KHs are trying to do is to see what exists on the ground, and push for knowledge to be seen in every staff member; that *knowledge isn't something that sits in two or three people or in just one affiliate.*" (Sanchez de Ocaña, 2015: 1 emphasis added) This is, in effect, an effort to disrupt traditional hierarchies and power

dynamics involved in the production and valuing of knowledge: that “real” knowledge is only found in published work or that the generation of knowledge is the reserved domain of those staff who have it in their job titles.

Yet, Oxfam still faces some challenges to this effort to disrupt and ‘democratize’ the notions and flows of knowledge creation. Institutionally, we must better support knowledge centers (hubs, networks, thematic groups and others) whose agendas and investments are decided in and by the global South. Individually, we must also better support staff, across all geographies and parts of the confederation, to understand and value their contributions to Oxfam’s knowledge and learning efforts. We must encourage and reward learning and sharing, as more strategic than ‘knowing and keeping’.

### **Knowledge and learning as a value-added outcome**

A knowledge-based organization not only uses knowledge and learning as an input to improve its work, as discussed above, it also treats creating and sharing knowledge as its work, right alongside implementing a project, or running a campaign, or delivering a humanitarian response. In other words, a knowledge-based organization understands that the knowledge it generates is part of its value-add in the world, and strategizes, plans, and invests accordingly. Evidence that Oxfam does this was not readily apparent in the change goal reports.

Anecdotally, we know that Oxfam shares its knowledge outside the organization, and gets feedback for refining that knowledge. We also know that Oxfam brings others’ knowledge into its thinking and practice. However, the evidence shows little discussion of the processes or investments that support this, or insights into how to strengthen the flow. Neither does it suggest that Oxfam understands that knowledge and solutions will form an essential part of its added value in a world of complex problems—a world that increasingly questions the implementation role and purpose of development INGOs.

That said, the evidence set offers some instances in which Oxfam-produced knowledge was used by others. Two examples are:

#### *WE-Care*

The WE-Care body of knowledge and its accompanying tools (see Thought Leadership section) operationalize theoretical concepts, gather evidence on the real-life challenges of women’s unpaid labor, and address them in practical ways. (Maes, and Zaremba, 2019: 56) Among those who are using WE-Care knowledge, Oxfam counts World Vision, UNDP, UN Women, World Bank, the UN High Level Panel on Women’s Economic Empowerment, and the for-profit Unilever.

#### *ACCRA and adaptive capacities*

One goal of the ACCRA program is that governments, humanitarian and development actors increase their use of evidence to implement policies and interventions that improve poor people’s adaptive capacity in the face of climate change. Not only did Oxfam integrate ACCRA’s evidence-based Local Adaptive Capacity Framework into its global resilience programming, CARE International did the same. ACCRA products were also said to have influenced World Vision and Save the Children. (Twigg, et al., 2018: 65)

## Facing the future

As Oxfam prepares for its next strategic plan, the organization will make many decisions about where to focus, how to pursue its plans, and what scale to aim for. Whatever areas and goals are prioritized, it is clear that Oxfam will need to better use knowledge and learning to continuously improve what it delivers, and to increasingly position its knowledge and solutions as part of its value-add in the world.

Oxfam envisions its role as one of influencing, convening, brokering – all functions that rely on some level of credibility and legitimacy. As the set of evidence reviewed for this analysis and our current experience with crisis show, credibility and legitimacy are based on both good work and solid evidence, and on good citizenship in the world. In our work, when we are recognized and successful, this is often based on practice that generates solutions and insights. We add value in the world – and find niche and receive recognition – when we not only implement or campaign but when we contribute thought leadership, ideas, and even provocation, shared through evidence. We must learn to value our knowledge as an outcome and a tool in the same way in which policy change or an effective humanitarian response are outcomes: they help Oxfam overcome inequality, injustice, and poverty.

At the same time, we must ensure that our positions and commitments on global balance and disrupting traditional North-South power relations also apply to our knowledge agenda. Stepping back to re-examine Oxfam2020 and its drivers of knowledge, global balance, and simplicity, we note that they are not just about an internal change process but also about Oxfam's relevance and role in the world. The complementarity of knowledge and global balance is worth emphasizing: Oxfam's quest for global balance must apply also to its efforts to generate, share, and contribute knowledge and learning. Oxfam's knowledge ambition can be more rooted in the countries and regions where it works. Simply put, its knowledge agenda must stem from greater equality, representation, and influence from the global South. Oxfam will only enjoy greater credibility, legitimacy, and relevance if it marries the global balance and knowledge ambitions.

In day-to-day work, this means focusing on people. The process of creating, sharing, getting excited about, and exploring new knowledge happens through the people who work for and with Oxfam. They are its greatest resource and asset: their experience, their expertise, and their creativity when faced with old problems or new challenges. Focusing on its people is the best step that Oxfam can take to strengthen its efforts to become a knowledge-based organization.

All Oxfamers hold knowledge and the ability to learn and help others learn. Many colleagues use some combination of the approaches outlined in these essays and face similar challenges and limitations in their efforts. The same, if with a different flavor, is true of colleagues who work on Oxfam's operational rather than change goals. Our task is to let them know that every time they tweak a process they are engaged in because last time it did not work so well, or help someone else fix a process that is not efficient, or capture what they have done and send it to a colleague, they are using knowledge and learning. It is the responsibility—and more importantly, the right—of all Oxfam colleagues and our partners to develop and use strong and consistent reflection and learning practices in support of individual and organizational goals. This is true “knowledge citizenship.” In a knowledge-based organization, it is a key role of leadership to

model reflection and learning; to embolden staff to pursue knowledge and learning across their daily efforts; and to hold the organization accountable for this practice.

Yet, these efforts cannot be an additional task or a separate goal on a list of multiple competing priorities. If knowledge and learning processes and practice are not immediately related to what people do, applied to their daily goals, jobs, tasks and approaches, it will continue to be an add-on that is not fit-for-purpose. We must first understand and internalize that functioning as a knowledge-based organization is not a task, an initiative, or a formal network or hub we set up but a way of being: a way of thinking, a way of communicating, and a way of working. Then, we must communicate that we value what people learn through their work and how they help others to problem-solve. Finally, we must reward efforts to reflect on both success and failure, to explicitly build on that in future efforts, to question why we do something the way we do it, and to try the same thing differently.

It is only through this combination of efforts that Oxfam can build a pathway to become a knowledge-based organization. This would capitalize on Oxfam's two greatest strengths – its commitment to equality and global balance, and its people - to pursue its new strategy goals.

# CHAPTER III: CONCLUSIONS

## Knowledge and Learning in all our approaches

### Influencing

If there is an approach to which an *agile learning agenda* is key, it might be influencing. As Oxfam continues to invest in our influencing efforts and role through a perspective of active citizenship, we must continuously re-evaluate our repertoire in light of closing civic space. Learning how to be more nimble and agile in working with others (coalitions, alliances, networks and movements), looking at how and under what circumstances they are effective or not in promoting active citizenship, robust civic space and accountable states, requires that we be explicit about what we know and do well, and what we still do not know and need to learn, and invest in this learning.

### Active Citizenship

Our evidence shows that, in light of closing civic space, Oxfam needs to refresh its understanding of ‘active citizenship’ as a strategy or an end to itself. It also shows that Oxfam should explore how active citizenship can be an effective avenue for transforming gender dynamics. These are challenges posed to us by our evaluators and our own reflections on the evidence we have reviewed. Since active citizenship is an integral part of our OSP’s theory of change, and a signature Oxfam approach, these challenges go to the heart of our contributions and relevance in the world. Therefore, they demand that we *continuously learn with others* – our evaluators, partners, citizens, women and youth, and more – to remain relevant.

### Program approach and theory of change

While many things can be learned from our examination of how Oxfam has used theories of change and its program approach to generate results, one highlight rises to the top: we must learn how to continuously cycle back to test and review our theories of change to close our learning loops. Better theories of change mean better programs, which help Oxfam raise ‘better money,’ which generates better knowledge, which leads to better theories of change. A knowledge and learning approach to unlocking this beneficial cycle would mean that we insist on the *use and re-use of knowledge*. We must ensure that Oxfam not only completes a theory of change or a proposal as a necessary document, but that it builds on what has worked or not worked in the past. And that we reflect on our efforts, including the unsuccessful ones, and update our knowledge and practice in turn.

### Partnership

Our evidence amply suggests that Oxfam needs to learn to enter into transformative partnerships. One key aspect of this is that we need to understand and treat our *partners as peers and collaborators in the creation and sharing of knowledge*. Our partnering will not be truly transformative – and our efforts to disrupt traditional knowledge hierarchies will not be truly

genuine – until we recognize, respect, support, and uplift our global-south partners' equal role in generating solutions and knowledge based on our shared work.

### **Putting women's rights at the heart of all we do**

Our evidence shows that we make progress when a gender lens, such as on unjust social norms, gets incorporated into other areas of our work. Because we make progress this way but not yet consistently across all our work, we must better understand what gender mainstreaming and putting women's rights at the heart of all we do really mean, in practice and for each of us. To do this, we must *learn from others*: from other organizations that have already gone through these struggles and journeys, who are thought leaders in gender justice work. We must have the humility to raise questions with them and learn from them, and to offer what we know in exchange.

### **Impact at scale**

A hard-learned lesson from the evidence on impact at scale is that, if left to serendipity or luck, impact at scale will not be achieved consistently or reliably. We must plan for impact at scale: we must design for it, implement for it, and learn what works and what does not when we pursue it. Programs, humanitarian responses, and campaigns must begin from good knowledge of context and obstacles to change at scale; constantly monitor and analyze what is scalable and what is not, what works and what does not; learn with communities and partners; adapt practice; and capture processes and results. In other words, impact at scale requires either the *application of existing knowledge* on what and how to scale up, or a *testing and learning approach for new solutions*.

### **Thought Leadership**

As with impact at scale, we have learned that thought leadership requires planning, investment, and nurturing. However, because it is not a self-proclaimed title but a recognition given by others, the investment also carries some level of uncertainty. It is often difficult to know which budding or promising areas of work to invest in, or which ones will grow beyond excellent practice into true thought leadership. One way to mitigate the uncertainty is to *learn from both success and failure*: from instances when Oxfam succeeded in becoming a thought leader (of which we have some examples) and from instances when it failed (of which we know very little). We must be very honest and very clear with our learning in order to make better-informed and more consistent investments in thought leadership.

Ensuring that knowledge and learning drive solutions to the challenges Oxfam has faced over this past OSP offers a role to every colleague.

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# ANNEX I: CHANGE GOAL REPORTS EXECUTIVE SUMMARIES

## The Right to be Heard: full report available on request

### Executive Summary

The Oxfam Strategic Plan (2013–2019/20) states that at the heart of Oxfam’s theory of change is the belief that “the interaction between active citizens and accountable state as fundamental to development.” The Right to be Heard (RTBH) is the plan’s first change goal and, during the course of the plan, has become a central element across all change goals as influencing has increased in importance. This review, of 21 external evaluations and 12 internal case studies, reports, supplemented by interviews with 13 Oxfam staff (10 in southern country offices and three in northern country office) focuses on the mechanisms Oxfam uses and how effective they are in protecting or opening up civic space, preparing active citizens and their organizations to engage with government to advance policy agendas; and in transforming power relationships.

The interventions, projects and programs reviewed were quite diverse, ranging from discrete interventions (such as laboratories of activism in Peru and the political empowerment component of a large-scale savings program in Mali); to country programs in Ghana and El Salvador on extractive industries, an ambitious program in Vietnam that sought to open up policy space and policy-making process, and investments in transformative leadership for women in Tunisia ; to regional and multi-country programs on empowering marginalized workers in ASEAN, mobilizing marginalized youth to advocate for health and education, and revitalizing the Education for All campaign in Africa (ANCEFA) to address the issue of education financing through better taxation and budgeting.

Because of the diversity of programs reviewed and the non-uniformity of the documentation (in terms of types of documents, the different evaluation designs; and the uneven, although overall good, quality of the evaluations) it is not possible to draw general conclusions about effectiveness of Oxfam’s work in promoting active citizenship, protecting, opening up and occupying civic space, advancing policy or changing power relationships, although there are some strong examples of effective programs. However, the documentation is rich in examples of Oxfam leveraging opportunities and confronting the challenges of pursuing influencing strategies, although still quite weak in gender analysis.

**Active Citizenship and Civic Space** Across projects and programs, Oxfam supports building the capacity of both citizens and CSOs to more effectively engage with government. Noteworthy among the projects and programs reviewed is the number that focused to bring the most marginalized people from the political margins and empower them as primary agents of change. This is often done by means of new forms of organizing, such as in transformative leadership for women programs and the emerging work with Youth as Active Citizens (YAC), but more typically through strengthening CSO individually or in alliances or coalitions. There are strong examples and different models of coalition building from the support of multiple, relatively small,

specialized coalitions in Vietnam to build their research, advocacy, media and negotiation capabilities; to carefully constructing a broad-based coalition in Zambia to work on issues of debt, taxation and budgeting, with members identified based on the assets they brought to the coalition; to trying to foster regional coalition building in several programs to reinforce national work (less successful). One interesting development, seen across several programs, are efforts not only to attract media coverage, but also to build the capacity of journalists in investigative reporting. Another is greater engagement and support of southern think tanks and research centers to make them more policy-relevant and increase their standing as interlocutors with government.

Oxfam has developed a wide repertoire of points of entry to occupy civic space – working with marginalized workers to establish dialogue spaces with government officials and employers in ASEAN; strengthening the capacity of traditional, indigenous authorities to better engage with official government offices in Guatemala; creating synergy with youth groups to amplify their own and Oxfam's messages and activism on a range of issues; to identifying openings in closed or weak spaces in countries such as Zimbabwe and the DRC; to supporting women to gain direct power as elected and appointed political office in Morocco, Tunisia and Colombia, among others. Oxfam also pursues insider strategies to influence government on policy matters and to increase engagement with civil society. In Ghana, Oxfam worked with partners to influence language in several important pieces of legislation that were enacted and in Ethiopia, that has one of the most restrictive NGO laws, Oxfam pursued an insider strategy to influence climate change governance by seconding staff to key ministries, with the long-term goal of greater citizen participation at the local level.

**Policy Change and Change in Power Relations** Many of the evaluations judged program effectiveness by ability to make policy change. While there were some significant policy victories, many more, when they happened, were more small-scale, partial, or ambiguous. For the most part, evaluations, even for those programs that specifically sought to transform power relationships, did not have strong supporting evidence for this, with a few exceptions. Most notable were Ghana's progress in opening up institutionally sanctioned space for civil society participation and oversight and progress in Vietnam in creating policy spaces for engaging with government, thereby interjecting citizens' voice in formerly closed processes of decision-making. To some degree, this finding may be a function of lack of convincing methods for measuring this, but several evaluations identified inadequate theories of change and inadequate analysis of power relations, while recent work within Oxfam on the issue of political capture suggests severe structural barriers that impede even challenging power relationships.

**Conclusions and Recommendations** Programs seem to gain the most traction in countries with some formal democratic space or spaces that are opening up; when they have a strong, testable theory of change that serves as a touchstone for the program; and programs where there are links with global processes or strong alignment amongst Oxfam priorities. Nonetheless, Oxfam has shown considerable creativity in working in more restrictive contexts, as well, where the need for engagement is arguably greater. Regardless, overall the efforts reviewed also demonstrate just how hard effective influencing to address poverty and inequality is, something that will become more difficult in the current, turbulent, context.

### **To be more effective Oxfam needs to:**

1. Rethink its theory of change (or theories of action for specific interventions) to reflect the dynamic and non-linear reality of pursuing policy, practice and power change, including the high likelihood of setbacks and even backlash.
2. Continue to build on the sophistication of its power analysis and its understanding of political capture and strengthen the interface between theory of change and power analysis, while incorporating contextual dynamics around changing beliefs regarding governance, the value of democracy and the role of human rights.
3. Be disciplined about matching resources to aspirations, investing at sufficient scale and duration to leverage significant change. When Oxfam is engaged in efforts that disrupt or are perceived to disrupt the status quo, it has a moral obligation to address the risk of backlash, not only for staff, but also of partners, allies, and community activists. Oxfam can build on work done the Knowledge Hub for Governance and Citizenship, as well as the guidelines developed by the Transformative Leadership for Women's Rights Working Group.
4. Get clearer actionable definitions of active citizens, active citizenship, and civic spaces (perhaps including typologies and means to differentiate degrees of engagement and quality of civic space). Oxfam also has to be clearer about what transforming power relations means in specific contexts, including incorporating better analysis gender and of intersectional oppression. Measurement will always be a challenge, but there needs to be an intentional process to get to greater alignment and rigor across programs, both conceptually and operationally.
5. Re-examine its portfolio of partners and allies and ways of work. There was considerable evolution under the current plan, but Oxfam still may benefit from a major re-examination, especially as it emerges from a long internal change process, so that its ways of working become more horizontal to more consistently co-create strategy, and more flexible, fluid, and technologically savvy, including lighter, nimbler grant and program management.
6. Have a serious discussion about the evaluation and learning infrastructure and processes needed to support the new strategic plan. It is imperative to be more strategic about what is evaluated and how evaluations fit into broader learning efforts to ensure tight feedback loops and creative cross-fertilization. Oxfam should examine the support to programs, country offices, and campaigning teams need to ensure stronger monitoring and higher quality evaluations, including a much stronger gender lens. Oxfam is literally sitting on a world of experience related to right to be heard and much more of it needs to be captured to inform program, policy, and the broader development community.
7. Finally, a more existential question to consider: – with the rise of illiberal regimes and movements, including in democracies the global north, that fundamentally challenge the relevance of a rights-based approach to development – are the types of programs represented in these evaluations enough of a response to changing national and global dynamics.

# **Gender Justice: Social norm change to eliminate VAWG/GBV**

Full report available on request

## **Executive Summary**

### **Background/Purpose**

In its 2013-2019 Oxfam Strategic Plan, Oxfam states that women's rights and gender equality are fundamental in achieving sustainable development, human rights, and efforts to reduce poverty and attain justice. These principles are expressed in Change Goal 2- Advancing Gender Justice. In summer 2018, Oxfam hired a consultant team to carry out a final assessment, Final Review and Sense-making Exercise for the Gender Justice Change Goal: Assessing Oxfam's Contribution to Changes in Social Norms in VAWG/GBV Programming Globally, to examine the Oxfam confederation's progress towards Change Goal 2.

Given the broad nature of gender and gender justice, the team focused on one indicative outcome of interest to frame the final review and sense-making exercise: changing social norms in relation to gender and gender-based violence. The team strove to understand Oxfam's added value and its approaches by examining the following three questions: What are the approaches/strategies/theories of change that are contributing to change in cultural norms and exclusionary practices surrounding violence against women and girls (VAWG) and gender based violence (GBV)?; What are the key outcomes Oxfam has achieved in relation to changing social norms to end gender-based violence?; and In what ways is Oxfam supporting partners, including women's rights organizations (WROs), so that they can advance their work in changing cultural norms and exclusionary practices around the right of women and girls to live free from violence? This assessment builds on lessons from the mid-term evaluation that was carried out in 2016.

### **Methodology**

The assessment used a mixed methodology, including a meta-synthesis of evaluation reports and learning documents and interviews. In total, we analyzed 13 evaluations and 12 learning documents published between 2016 and 2018 to document progress made towards Change Goal 2, Gender Justice Goal. Twenty key informant interviews (KIIs) with 17 staff (1 being a 2-staff interview) and four partners were carried out to gain insight and better understanding of how Oxfam works, what works, and where things could improve. Additionally, the team focused on understanding how VAWG/GBV intersects and overlaps with other sectors such as education, sexual and reproductive health and rights (SRHR), and VAWG/GBV in emergencies. The assessment team used a combined inductive and deductive analytic approach that drew from the Oxfam Conceptual Framework - Conceptual Framework on Oxfam's Approach to Changing Negative Attitudes, Social Norms and Behaviours to End Violence Against Women and Girls/Gender Based Violence - alongside the previous coding framework established in the mid-term evaluation. The evaluations and learning documents and interviews were all analyzed using ImpactMapper, an online mixed method software.

### **Overview of Reviewed Research Documents**

Only one of the projects /programs evaluated was long-term in time-span, operating for 10+ years. The majority of the projects were defined as short-term (1-4 years), which is a relatively limited

amount of time to expect change in social norms. The top three sectors that projects engaged in were community based (n=11/25), economic (n=9/25) and justice (n=5/25) interventions. With the exception of the presence of the economic sector, this finding concerning project sectors is similar to what was presented in the mid-term. Five projects had some activity at all four levels of the ecological framework - individual, household/relational, community, and societal. This time around, the assessment also included project/programs that targeted the relational level – compared to the mid-term when there were none. Lastly, 21 of the 25 reviewed documents addressed at least one of Oxfam’s Guiding Principles to ending VAWG/GBV. While the KIs were conducted to complement the document review, fewer than half of the KIs noted at least one Guiding Principle.

## **Key Findings**

All 25 research documents were reviewed to examine what theories of change contributed to changing social norms in VAWG/GBV. Sixteen of the 25 research documents (13 evaluations and 3 learning documents) mentioned theories of change, and the most commonly used was the Empowerment theory (personal-political-societal), followed by the knowledge, attitudes, and practices (KAP) framework, and role model theory. The social movements’ theory of change was the least referenced, which is interesting given that this approach has been highlighted as successful in the literature for supporting work on ending VAWG from a policy perspective.

Among the key outcomes examined in this assessment are those related to negative attitudes around gender and negative attitudes related to VAWG/GBV. Acceptance of gender hierarchal attitudes and acceptance of stereotypical gender roles were the two most common negative attitudes found in documents reviewed. The two most common negative attitudes related to VAWG/GBV in research documents were acceptance of partner, community and/or gang violence, and tolerance towards VAWG/GBV. Negative norms related to VAWG/GBV and structural norms were also key norms-focused outcomes that were examined in this assessment. We found that the most common negative norms related to VAWG/GBV were acceptance of physical/intimate partner violence and men’s right to discipline/control women’s behaviour and patriarchal norms that perpetuate violence.

Fifteen out of the 25 reviewed documents discussed outcomes related to changing social norm change, specifically at the short-term and intermediate outcome levels. Similar to the mid-term meta-evaluation, the outcomes were mapped using Gender@Work’s Integral Framework to note primary progress areas. For gender transformative change to occur these shifts must be seen, at both the individual and societal levels and across all four of the framework’s quadrant areas. These quadrant areas are consciousness raising, access to resources/services, institutional and policy change, and deep structure/culture. Seventy-three outcome areas - were identified after review, of which 28 were intermediate (n=28/73) and 45 being short-term (n=45/73) outcomes. The two short-term outcomes most frequently noted were increased awareness of what constitutes VAWG/GBV and increased access to quality services. Increased empowerment/agency and communities no longer condoning VAWG/GBV were the intermediate level outcomes most frequently noted. Further, this review found Oxfam contributed to 16 outcomes on social norms change underpinning VAWG/GBV, which is considerable progress from the mid-term review, which found no evidence of social norm change.

Unintended outcomes – unanticipated wins (positive unintended outcomes), negative unintended outcomes, and reversals or further worsening of the current situation as a result of programming,

“backlash” – were also examined as part of the review. Only seven documents (5 out of 13 evaluations and 2 out of 12 learning documents) reported on unintended outcomes. Some change strategies that were put in place to end VAWG/GBV failed to address all forms of violence being experienced and instead focused attention on a limited form of violence and a one-dimensional strategy for ending violence, which led to reinforcement of abuse. For example, mediation was used as the primary strategy to end interpersonal violence in Papua New Guinea to address physical violence at the hands of a spouse/partner. In turn, other forms of violence – e.g., emotional – and other underlying factors – such as power dynamics- remained unaddressed in this context- thus reinforcing harmful norms that support and sustain VAWG/GBV.

Nearly half of the documents (n=11/25) reviewed instances of resistance or backlash, which is an important finding that all Oxfam staff and partners must be aware of and account for in their programming. The reality in gender equality, rights and GBV work is that often when power begins to shift, significant backlash, threats, or outright violence can ensue against the women involved in the projects/programs or against women’s human rights defenders.

### **Quality of Research Documents**

As part of this review, we analyzed a total of 55 documents (evaluations, final reports, key research pieces and learning documents). Of these 55 documents, only 25 were deemed to have met minimum quality requirements and thus, were included in the review. The documents were then ranked for quality, with rankings of Strong/Moderate/Weak. Only six included in the analyses were rated as being of “strong” quality, and the rest being “moderate”.

### **Conclusions**

Oxfam has made progress in changing social norms related to gender and gender-based violence, but significant shifts have yet to be achieved. This final assessment noted that similar to the mid-term meta-evaluation, there was focus on awareness raising, in addition to access to services and resources. There were promising approaches – particularly those engaging in transformative leadership and some that utilized a multitude of strategies to generate norms change. However, as noted in the mid-term meta-evaluation, short project lives, limited resources and lack of contextual analyses with a gender lens as well as room for improved MEL for learning and program design/implementation, contributed to more modest shifts in social norms related to VAWG/GBV.

In answer to the guiding question for this review - What are the approaches/strategies/theories of change that are contributing to change in cultural norms and exclusionary practices surrounding violence against women and girls (VAWG) and gender based violence (GBV)? We found that Oxfam projects that demonstrated changes in social norms using multi-level approaches were more able to address the non-linear and complex pathways that lead to social norm change. Some of the more promising theories of change that emerged from the analysis were ‘empowerment: personal-political-societal’, ‘role models’ and ‘knowledge-attitude-practice’. Of the social change strategies, consciousness (awareness) raising and leadership development appeared the most frequently used. It is important to emphasize that the programs that demonstrated changes in social norms were those that worked across different sectors and targeted not only women and girls, but men, boys and different groups of influencers such as traditional and religious leaders.

In order to make more substantive progress, Oxfam must make concerted efforts to ensure contextual analyses using a gender lens are undertaken so that project designs incorporate the intent to shift gender power, norms and behaviour. In addition to this, Oxfam must invest in designing and implementing MEL strategies using a feminist lens that have a clear and rigorous understanding of how to achieve, document, and measure that targeted social norm change. Oxfam's reliance on awareness raising, along with the short timelines for change to occur, and the modest pockets of funding allocated to that, seem inconsistent with the stated aim to achieve norm and behaviour change to prevent VAWG/GBV.

This final review and sense-making exercise also highlighted an envisioned role for Oxfam in the global space as a convener and connector. Oxfam is well positioned to play its part as connector – for instance between WROs and police, judiciary or connecting the judiciary with communities, or building platforms for WROs to connect nationally, regionally and/or internationally with each other. Brokering these relationships even if we are not fully part of them, is crucial in fighting negative social norms. Working with more women's rights organizations, youth organizations and movements and strengthening the existing movements in the sector is a crucial role which Oxfam should play.

Below we highlight a few recommendations.

### **Key insights from Staff of Oxfam:**

- Gender mainstreaming has not happened in all the change goals and themes. Oxfam is still struggling to find space to fully and meaningfully implement a transformative approach to gender in all change goals. Whatever sector, when engaging in program analysis or sector analysis, VAWG and/or gender equality will emerge as an important issue.
- Since GBV touches/intersects with all sectors, all Oxfam staff should build capacity in working on norms/GBV/VAWG. It should be done using knowledge management processes - documenting, sharing lessons learned; also work through partners' agendas.
- There is a need for internal leadership to recognize that changes in social norms take time and that this requires more resources and investment.
- Capitalize on voices of youth to stop GBV. Support more coherence and openness to listening to women's rights activists and movements, and more external evidence of successes to support greater investment in strengthening women's rights movements.
- Oxfam objectives should be developed in coordination, and not compete with women's and feminist organizations; we shouldn't have an Oxfam agenda, but rather a feminist agenda.
- More internal work on understanding gender and power is needed. The future depends on Oxfam's success in appropriately addressing and effectively working on these issues.

### **Select Program-Specific Recommendations**

#### **With Program Design**

- Engage in gender, risk and context/power analysis before program design. Any Oxfam program, gender-specific or not, should ensure the program analyzes and addresses gender and power imbalances adequately, mitigates against related risks and furthers Oxfam's GJ agenda.

- Promote staff and partners' use of deep contextual analysis in the design phase to greatly inform and shape implementation and foster program sustainability. Furthermore, any program/planning design must engage partners from the scoping period onwards.
- Develop further the men and boys advocate pillar with a focus on deconstructing masculinities and gender power. Gender norms inclusive of masculinities manifest and are reproduced across the social spectrum, so program interventions and coalitions, must seek changes at the interpersonal, institutional, and community levels as well as within the political and legal spheres. In order to truly address the roots of discriminations, issues of power and masculinities should be explored along with a focus on creating equitable relationships of mutual respect.

### **With Implementation**

- Ensure support (safety plans, resources, connections to safe houses, shelters, etc.) is available to women experiencing backlash or who are at increased risk for violence due to Oxfam programming. The assessment found that many programs shared evidence of backlash and we know that in many regions around the world violence against WHRDs is on the rise.
- Engage in multi-faceted program interventions that target the roots of inequalities, not just the immediate problem. For example, WEE interventions need to include components beyond providing economic resources and technical skills training. They should provide awareness-raising activities focused on personal empowerment, gender power relations and VAW, communication, and how to address household conflicts.
- Involve and engage the partners of women participants in awareness-raising components – either alone or together with women – in order to reduce the resistance and backlash that could result from participation. Working with men should focus on encouraging less biased gender attitudes, norms, and beliefs, promoting women's rights, facilitating mutual respect and open communication, and generating common understanding about the benefits of women's empowerment and the root cause of gender inequalities including VAWG/GBV.

### **Within Oxfam**

- Develop a long-term strategy and appropriate funding to shift norms related to VAWG/GBV, in alignment with a transformative approach. Acknowledge that change takes time and changing social norms around violence, rights, women's empowerment, and gender justice can be a slow process. Weave a gender transformative approach as the common thread throughout all programs that address VAWG, gender justice, and SRHR.
- Strengthen data quality around program evaluation to ensure that more insights and lessons can be used for information sharing and to decide whether interventions should be scaled up or not.
- Support internal reflection processes, and make it mandatory to address gender bias and stereotypes internally within Oxfam and its partners. Gender bias, stereotypes and limiting cultural norms exist within Oxfam and its partners' institutional structures and could be replicated within programming if they are not monitored and addressed. Every Oxfam country office and partner needs to ensure that their staff complete gender awareness training and gender biases and discriminations is monitored and addressed.

- Provide sensitization and technical training for staff to support inclusion of sexual and gender minorities in VAWG/GBV programming. Operationalization of the inclusion of sexual and gender minorities into programming efforts will require staff who have solid understanding of issues faced by these groups, including safe and effective engagement strategies, program design options specific to technical and thematic areas, as well as advocacy and monitoring and evaluation strategies.

### **With Partners**

- Provide sensitization and technical training related to inclusion of sexual and gender minorities to all partners, particularly organizations undertaking DRR and humanitarian response.
- Support intersectional, and multi-level movement building and alliances. There is opportunity for Oxfam to leverage their perceived role as a convener to facilitate linkages between partners, movements, larger networks and major players such as government organizations and global alliances, and begin to mainstream gender justice and VAWG into various sectors.

### **Program Sustainability Recommendations**

- Ensure that projects have been developed by and with partners for greater cultural and programmatic relevance. Quality, not quantity, is what to aim for when establishing partnerships to ensure that programming is culturally appropriate and relevant.
- Use community level approaches that aim to change norms. These cost-effective approaches may sit in informal environs such as affinity groups, where individual behaviour, attitudinal change is targeted but the effects and benefits of intervention spill over as multiple individuals are experiencing some level of change.
- Changing social norms takes time. Oxfam should carry out greater investment of resources and support of long-term strategies and interventions in order to end GBV.

### **MEL Recommendations**

- Build capacity with staff; ensure external evaluators have a track record of rigorous analysis.
- Facilitate, and/or, directly support, more sharing of project lessons (results, outcomes).
- Push for MEL systems that are attentive not only to tracking outcomes but also processes. MEL systems that allow for participatory data collection can better capture the dynamic processes that coincide with norms change.
- Based on lessons learned, below are recommendations for Oxfam over the next 3-5 years to focus efforts in working to change social norms around VAWG/GBV:
- Continue program expansion and greater funding to work with various populations on issues related to shifting norms around VAWG/GBV.
- Promote a Walk the Walk, Talk the Talk approach with capacity building and empower staff to understand and operationalize gender norms programming. When promoting a rights-based approach, Oxfam needs to take the necessary steps to ground staff in the practice. It does not help to talk about and encourage good practices and then have staff members not apply this knowledge in programming or in their offices.

- VAWG/GBV intersects with all sectors and this knowledge must be appropriately transferred and applied, especially at OI and Oxfam country offices and in all programs. There are successful approaches emerging in WEE/VAWG and TLWR/VAWG and promising practices in the area of Education/VAWG and SRHR/VAWG. In addition to this, there is an urgent need to also reflect and strategize around how VAWG/GBV work is addressed in Humanitarian programming.
- Oxfam is a recognized convener across multiple sectors and settings and needs to act in this capacity at the highest levels. Oxfam appears to be well positioned in its networks and partnerships.

## **Sustainable Food**

Full report available upon request

### **Executive Summary**

This report represents a meta-analysis of evaluations, reviews and reports on a selection of Oxfam’s work under the Sustainable Food Change Goal of the Oxfam Strategic Plan 2013 – 2019. It provides a synthesis of Oxfam’s contributions towards fulfilling the objectives specified under the Change Goal, identifying actionable insights and recommendations for their inclusion in the development of the new strategic plan. While the strategic plan lays out the ambitions – the goals and objectives, outcomes and some of the approaches that Oxfam will employ – it does not clarify the role of Oxfam in achieving these goals. A range of different campaigns, programmes and projects have emerged over the period of the OSP that have led to a diverse set of outcomes using a range of approaches.

1. The level of ambition set out in the Sustainable Food Change Goal is high, and requires the cooperation, coordination and collaboration of Oxfam, partners and many different stakeholders. The programmes and campaigns that constitute Change Goal 4 pose challenging goals, which are ambitious to achieve within the short space of time allotted to the OSP. Despite these ambitions, many programmes are achieving their stated objectives as set out in their specific theories of change and programming commitments. However, it is not clear how, or indeed whether, the programmes are working together to deliver the Change Goal.
2. Overall, there has been progress towards the Sustainable Food Goal. There are clear policy level outcomes depicting systemic shifts, and evidence of farmers, women and other people with whom Oxfam works making their voices heard in new spaces. Even where dialogue has been constrained, such as in some Latin American countries or in dealing with some Private Sector actors, Oxfam has successfully supported building new arenas for discussing issues critical to Sustainable Food, such as land rights. The resulting outcomes - shifts in policies and practices - are visible at multiple levels – from global engagement in COP21 to regional leverage on EU policy and formulation of national policies.
3. The more substantial outcomes have resulted from programmes that are designed to influence food systems from the outset. Individual programmes have delivered on very specific objectives, such as influencing policies relating to land rights and agriculture, raising awareness about and building resilience of smallholder women farmers. While many of the

outcomes are only partially completed, with the effects of the changes not yet known, they do illustrate a momentum that can be built behind change and the pivotal role that Oxfam has played in mobilising these movements. However, the impact on smallholders, women and food security in general is usually invisible, at least in the documents which this evaluation reviewed. Furthermore, sustainability remains a challenge which needs to be addressed in the very design of an initiative or movement in order to ensure that changes are seen and followed through.

4. While some programmes combine field level implementation with influencing, their impacts have been more localised and they have been less effective in shifting policies and institutions in the food system more widely. The five examples of mainly direct implementation programmes confirm earlier findings that these contribute little to changing the food system.
5. The most influential programmes under Change Goal 4 apply a mix of different approaches – ranging from developing their own theories of change based on unique power analyses, to applying a mix of strategies to collaborate with or influence different actors. The strength in Oxfam’s approach lies in its flexibility – both in terms of framing how programmes are designed and in their implementation. Due to this diversity of approaches, this evaluation could not discern which approach, or combination of approaches, are most effective under varying contexts.
6. Flexibility across the Change Goal has also proven to be a strength, especially in the increasingly uncertain and changing context of today’s world where political lines shift and spaces for engagement are fluid or closed down, as the Case Study of the Crece (Grow) Campaign in Nicaragua shows.
7. While almost all programmes reviewed expressed ambitions to have an impact at scale, this was interpreted in different ways. Some programmes set out goals in terms of households while others measure themselves by the number of companies in which the programmes operate. There are still a number of programmes that base their scaling strategy on trialling and piloting methodologies, systematising learning and then using this as evidence to provoke wider policy or market changes which are intended to have the impact at scale. Other campaigns and programmes are designed to drive systemic changes through influencing policies or institutions, which in turn leverage changes in behaviours and outcomes across a wide set of stakeholders. Due to the difficulties in measuring the impact of such systemic changes, it has not been possible to evaluate the extent to which this approach has actually led to impact at scale – beyond the direct sphere of influence of a particular campaign or programme. For instance, evidence of the spill over effects from the banana (in the Make Fruit Fair Campaign) or strawberries (Moroccan Strawberries project) were not present in this evaluation.
8. While women’s rights are incorporated in varying degrees across the initiatives reviewed for Change Goal 4, programmes with more intentional and intensive focus on women’s rights have been more influential in enforcing women’s rights from personal, household, community through to national levels. Many programmes provide evidence of building women’s leadership capacity, increased income and livelihoods opportunities for women, changes in recognition of women’s role in food systems, and in some cases, such as in Burkina Faso have led to policy level commitments. However, the extent to which

programmes are generating true shifts in gender dynamics, and in the relationships and processes guiding decision making that affects poor rural women and food systems, is not clear. Gender dynamics in economic, social and political spheres drive food systems, and this requires a consolidated and coordinated effort between different gender justice initiatives, both across Oxfam as well as with stakeholders across the world. The scale and depth of gender inequality and women's calls for longer programme and campaign time frames, allowing deep-seated changes in attitudes and social norms to take root and to permeate the way in which food systems operate.

9. Oxfam's approach to partnership, coalitions, movements and networks is visible across its programmes and campaigns under Change Goal 4. As an experienced convenor and facilitator, Oxfam has shown it is able to apply different forms of engagement with allies and antagonists alike, and to develop new and innovative collaborative approaches that fit specific contexts and needs. Oxfam encourages coalitions and networks to take on their own identity and agendas, supports empowerment of southern-based partners and movements, and responds to changing contexts and circumstances through shifting strategies and sometimes allegiances. The willingness to release control of issues and agendas to partners is critical for developing power within civil society. This process can take time, and some movements and coalitions struggle to continue functioning after Oxfam withdraws its support, indicating that in addition to building capacities to deliver solid outcomes, more attention needs to be given to developing organisational and financial stability.
10. Investing in efficient and responsive coordination, management systems, and in working with partners and other collaborators pays off. With excellent project management, large complex programmes like MFF showed how good organisation, committed management and clear strategies were able to rally different stakeholders towards a common goal. Strong management supports information and knowledge exchange, learning, and generating focused analysis for clear and effective campaign messaging.

While programmes and campaigns are contributing towards systemic changes and shifts in the balance of power influencing food security and agriculturally based livelihoods, the extent to which these outcomes are contributing towards a complete transformation of the food system is hard to gauge. The Sustainable Food Change Goal, in its breadth and spread, seemingly encompasses such a large number of issues and areas which are difficult to synthesise into a focused direction. From land rights to financial flows, trade policies to supply chain practices, changes in the many arenas where Oxfam has been working are happening, but often without a visible impact at scale on the people whom Oxfam seeks to support – in other words beyond the groups that Oxfam directly engages with. Furthermore, the overarching progress towards a common Change Goal – namely transformation the Food System – was not evident in this exercise.

Successful transformation of food systems intersects with the other change goals, as well as many other initiatives outside of Oxfam and will require being at the leading edge of new forms of collaboration, of communication and influencing tactics, and most importantly, being patient and giving sufficient time to develop long-lasting, deep changes. Working through and with a range of institutions and organisations, facilitating movements and combining adversarial and collaborative tactics targeting allies and antagonists alike, Oxfam can play on its strengths to

challenge and drive forward changes in the food system. What is more challenging, is tackling the entire ambitious Sustainable Food Change Goal in one sitting. With limited resources and reach, Oxfam needs to identify a few focus areas and the levers to pull that initiate change.

## **Financing for Development**

Full report available on request

### **Executive Summary**

This report presents the results of a reflection and sense making exercise regarding the Oxfam Strategic Plan 2013-2020. It focuses on Goal 6: Financing for Development and Universal Essential Services. As such this report covers the Fiscal Accountability for Inequality Reduction (FAIR) program, the Even it Up (EiU) campaign, and essential services work. The report documents outcomes achieved, as well as reflecting on approaches and gaps. Recommendations are also presented to inform the next strategic plan period.

The defining feature of this period is Oxfam's thought leadership on inequality. The organization has a unique position amongst its peers, with a powerful global voice and increased potential for influence. At national level, Oxfam has achieved notable success promoting inequality reduction policies in Spain, as well as helping create a national inequality commission in Scotland. Initiatives to kick start national inequality debates are underway in many southern countries. Latin American teams stand out as having developed innovative strategies to change the narrative on inequality in the region.

Oxfam's progress on tax is also impressive. The organization has gone from very little work on tax pre-2013, with the exception of the extractives industries (EI) sector, to becoming a key actor in the global movement. A number of global outcomes merit highlighting: Oxfam's contribution enshrining country-by-country reporting rules as a transparency measure within OECD and EU rules; the EU and Canada implementing new payment disclosure rules for EI companies; and commitments made by 14 EI companies in relation to contracts disclosure. At national level, interesting tax policy outcomes were identified in Vietnam, Pakistan, Ecuador and Bolivia. Oxfam has also influenced EI legislation in various African countries (improving governance, transparency, fiscal terms and controls), as well as influencing governments to renegotiate terms in their contractual agreements with EI companies.

Oxfam has been very successful improving budget transparency and formalizing spaces for citizen participation. This active citizenship approach has also led to wins in terms of new/increased budget allocations by local governments that have directly benefited poor communities. In parallel, Oxfam is successfully influencing local level expenditure of extractives' revenue. When it comes to national level budgets, there is some progress enshrining legislation incorporating gender responsive budgeting (GRB) principles into budget planning. There are also some significant wins in Ghana: securing high proportions of extractives' revenue for education and agriculture, and influencing the IMF bailout terms in relation to social spending. Additional wins achieved include increased spending on medicines in the Occupied Palestinian Territories and Israel (OPTI), and increasing the budget share invested in education in Burkina Faso.

The essential services portfolio has seen many positive local level educational outcomes and some changes to regional education policy and practices. However, there is less evidence of influence on national education policies, with the notable exceptions of experiences in Ghana and China where impressive scale has been reached. Influencing education financing appears to be the weakest aspect. For health, one highlight is that Oxfam's influencing led to the adaptation of an SDG indicator, from one of measuring coverage of insurance schemes to a more progressive indicator measuring the impact of out of pocket payments on health. There were also some examples identified in the review of successful influencing of the quality of health service provision at local levels via social audit type work.

An important conclusion is that national level budget advocacy focusing on essential services should be a priority for (re)investment in the next strategic plan period. This portfolio has suffered with the various transitions and realignments. There are also fewer national budget wins than would be expected. While there appears to be a strong focus on local level budgets, there is a lack of strong popular mobilization, campaigns and successful advocacy around national budgets. This gap was emphasized by many who felt that essential services, and advocacy around health and education particularly, is the critical missing element.

This review demonstrates how sustained investment on fiscal justice can bring significant rewards. This is evident from EI work and from the experience in Ghana. If Oxfam is interested in impact at scale, long-term investment is essential. It is also clear that Oxfam has impressive levels of access to governments and constructive dialogues are facilitating change. This is visible across EI work and tax work generally. Genuine capacity gaps appear part of the reason why governments are open to Oxfam's contribution. Though active citizenship is a key strategy for the FAIR program, it is not the only route to change. It may be useful to acknowledge more the success of high level, insider advocacy strategies.

There also appears to be a lot that those working on fiscal justice can learn from EI work, including particularly its selective nature. The EI team often directs resources to countries with new oil, gas or mining activity. As such teams are, by definition, led by political opportunities. These are specific to geological contexts, but it is clear that having focus has rewards. The question is: can this be achieved across fiscal justice work, identifying political opportunities at country level and investing strategic support for teams in these locations, and is this an appropriate strategy for Oxfam to follow?

Finally, while some would prefer more mass campaigning, there is also recognition that popular campaigning perhaps needs to be done differently. Some of this is down to shrinking civic space. However, there is also a shift towards long-term narrative change and cultural strategies to win over 'hearts and minds' and to garner public support for new inequality reduction strategies. More investment in strategic research combined with innovative communications and media work could yield success. There appears to be learning accumulated in these areas that could be explored more in the next period.

## **Recommendations**

1. Don't squander the thought leadership established on inequality. It is rare and compelling. Many are urging Oxfam to embrace inequality as the overarching future framework: with

inequality at the centre and the main drivers of inequality – including but not limited to the fiscal aspect – clearly conceptualised under the next plan.

2. Don't disinvest in tax even if concrete wins appear lacking. Oxfam has developed serious expertise and is positioned as a leader in this area. Progressive taxation is a 20+ year fight. Similar to the work on EI fiscal regimes, a long-term commitment is needed here.
3. Reinvest substantially to influence public spending on essential services. Guard against the complacency that may set in because the new EiU campaign is framed around fiscal justice for women and girls. Ensure that 'growing the footprint' in relation to advocacy on health and education budgets is a central feature of the new plan. Consider the potential inclusion of other priority social spending areas - such as social protection and early childhood care and education – given their importance for gender equality.
4. Look deliberately at Oxfam's value added on essential services. Focus strongly on the financing angles - bringing the revenue raising side into debates and developing more fully equitable financing approaches that ensure increased revenue is appropriately allocated – both geographically and programmatically - to reduce education and health inequalities. Focus strongly on privatization and taking work on this to scale. Reinvest in the global policy advisor structure in relation to public services to support this work.
5. Conduct a gender audit of the FAIR program to assess exactly how teams are integrating gender into their tax and budget work. Ensure GRB approaches, techniques and principles are integrated into national budget advocacy on essential service provision, involving women's rights organizations from the beginning in these initiatives.
6. Consider whether Oxfam can and should do more to secure national victories, including identifying countries with the greatest political opportunities for fiscal justice wins, and potentially directing significant policy resources and support to those with the highest potential for transformative change.
7. Invest in more systematic learning from the new, creative, cultural and communications strategies being employed and the 'new media' work.
8. Invest more in capacity building on narrative change strategies. At the same time invest in learning in this area to assess the impact of these strategies. Identify some country programs or affiliates that can pilot evaluations in this area. This is important to really demonstrate what Oxfam can achieve in this area.

## **Resilience (cross-cutting)**

Full report available on request

### **Executive Summary**

This report presents the findings of a study by a team from the Overseas Development Institute that was commissioned by Oxfam. The study's main purpose is to provide Oxfam with knowledge about the outcomes of its resilience-building initiatives, in particular what has been learnt about how changes have been achieved. The research addresses five strategic learning questions to be answered using documents (such as evaluation reports, research and learning documents) and primary data (key informant interviews). The aim was not to carry out a

comprehensive analysis of Oxfam's work in resilience, but to capture significant learning and evidence from that work. Oxfam will use the results to show how it is contributing towards achieving the Oxfam Strategic Plan 2013-2019, specifically regarding resilience, and to inform the planning process that will define the Oxfam Strategic Plan for 2020-2026.

The research studied a sample of Oxfam's resilience-building programmes and projects covering a range of geographies and contexts, types and scales of intervention, and outcomes. Many of these sought to achieve resilience through economic empowerment, particularly involving livelihood support and development (community savings schemes featured strongly in a number of programmes); others were more closely linked to disaster risk reduction (DRR) or humanitarian interventions. Many were responding to the stresses experienced or anticipated from climate change, in dryland and other contexts. The study looked at programmes in Africa (Burkina Faso, Ethiopia, Senegal, Mali, Mozambique, Uganda, Kenya, Zambia), Asia (Bangladesh, Cambodia, India), the Middle East and North Africa region (Iraq, Lebanon, Syria, Algeria, Occupied Palestinian Territory, Yemen), Central America (Guatemala, El Salvador, Nicaragua, Cuba, Dominican Republic, Haiti) and Melanesia (Vanuatu and the Solomon Islands).

The review focuses on five strategic learning questions for resilience that were set by Oxfam. These related to:

- 1) how Oxfam is strengthening transformative capacity when building resilience;
- 2) the different types of collaborations, alliances and partnerships Oxfam is engaging with in resilience programming;
- 3) how Oxfam's resilience programming is building capacities and promoting leadership of local actors in locally-led resilient development processes, including climate change adaptation (CCA), DRR, and humanitarian action;
- 4) the degree to which context analysis that informs resilience programming is inclusive and participatory, and how its findings from the analysis are translated into programming; and
- 5) how Oxfam is learning about resilience programming, how that learning influences adaptive management and contributes towards transformation.

The main findings of the study, relating to the five strategic learning questions, are as follows:

**Transformation.** Oxfam's programmes are contributing to increased transformative capacity. Vulnerable and marginalized people are securing greater control over resources, greater agency and autonomy. Projects are delivering innovations, creating shifts in policies and institutions, and delivering lasting and sustainable gains. There is scope to deliver more comprehensive transformation, to build transformative capacity from the beginning and to deliver more benefits at scale. A shift in perspective may be needed, with longer-term and more strategic transformative visions. Oxfam should consider if projects and programmes are genuinely and intentionally transformative, and what are the main drivers of transformative change. Oxfam needs to consolidate and articulate a clear concept of transformative capacity to help programme managers. Methods should be developed to measure and evaluate transformative capacity more effectively.

**Partnerships.** Oxfam's approach to partnerships is based on trust, equality and respect for autonomy. Multi-stakeholder partnership remains the key partnership delivery mechanism. This approach encourages collaboration with a wide range of development actors and across scales. Collaboration with local and community-based organisations is fundamental to Oxfam's approach: the most effective entry point for strengthening transformative capacity and resilience is the local level. There are challenges in effective integration of DRR/resilience and humanitarian activities and actors, but there are signs of progress; the 'localisation agenda' may stimulate further collaborations.

**Local capacities and leadership.** Community-based organisations (CBOs) played a central role in building local resilience capacities. Formation of community-based groups and organisations for managing risks and disasters was a key driver of resilience-building in Oxfam projects. Oxfam supported CBOs in a variety of ways. Capacity building made CBO members more proficient and confident, and strengthened organizational abilities. There was widespread community support for disaster-focused CBOs and high levels of community participation. Community action planning was a key element in activating communities for change. The exercise of democratic processes in CBOs was important for group formation and development, while election of women to leadership positions was transformational.

**Context analysis and inequality.** A human-rights based approach guides Oxfam's resilience programming, underpinning Oxfam's priority to support gender justice and to address inequality between social groups. Programmes aim at supporting people's rights and well-being. The goal to promote gender justice to build resilience largely shapes Oxfam's programmes, although integration of the approach is not yet consistent across programmes. There is a need for more systematic consideration of inequality, addressing the needs of a wide range of marginalised and excluded groups, and for more thorough context analysis in programme design. There is also very limited analysis of the intersectionality of social identities that influence people's vulnerabilities.

**Learning.** Oxfam staff recognize the importance and the challenges of learning. Oxfam and its partners put considerable efforts into the design and use of methods, and tools for planning and evaluation. More work is needed to identify change beyond the household or local levels, and beyond the life-cycle of individual projects and programmes. Active knowledge sharing is encouraged but it is not always clear how learning is being incorporated, transferred or used to adapt project activities. There should be more application of systems thinking that recognises interdependencies between the social, political and environmental domains. Oxfam's investment in global and regional knowledge hubs has considerable potential as a support for the many 'learning journeys' that the organization is undertaking.

# ANNEX II APPROACH DEFINITIONS

## Evaluation OSP 2013–2019: Reflection & Sense-Making

### Categories in the Ways of Working Approach

16 August 2018

### Introduction

The categories outlined below are approaches that Oxfam and partners use to get to outcomes. In an interview, one program policy manager referred to them as Oxfam's 'special blend'. We want to explore the ways that these approaches, how we work, help us achieve outcomes. What are our most valuable capabilities? When are we at our best? Our target audiences include decision-makers for our accountability commitments, our program teams for learning to improve our programs and our colleagues in public engagement and fund raising that will want to share the information. Overall, the information we generate should also inform the development of the new OSP.

The categories were identified through interviews with Regional Directors that were carried out in in late April through early July. Some of the phrases below are 'catch words' for categories of complex work; the questions below the sub-title suggest nuances that need to be examined. It will be important to report on what Oxfam's evaluations and learning documents tell us as well as the questions that the documents are not able to answer. The descriptions below do not pretend to be the full range of meaning in each category; we will endeavor to provide background documents to inform consultants on each approach.

### Program Approach and Theories of Change

A program approach is defined in the following way:

- Meaningful vision that informs all of Oxfam's work as a holistic effort
- Overall approach that expresses Oxfam's understanding of its contribution in a particular context
- Includes Oxfam's blend of approaches and ways of working that add value: rights-based approach, leveraging local to global reach, challenging unjust power structures (inequality and gendered power relations), and impact at scale
- The theory/theories of change are the pathways through which the stakeholders expect change to happen; it is coherent with the program approach.

How did an analysis of the different power relations inform the program design? To what degree was there coherence between the strategic choices as expressed in the program approach, the theory of change and the expected outcomes? How did Oxfam align and organize its available resources (skills, time, and funds) in light of the theory of change and the approach? How did Oxfam and partners assess available competencies and renew and/or bring in new competencies? How did Oxfam and partners respectively add value and/or complement their specific skills? How did the program approach evolve over the

course of the initiative? How did Oxfam and Partners review the theory of change and assess the continued relevance of the program approach over the course of the initiative?

## **Influencing**

For Oxfam, influencing means undertaking systematic efforts to change power relationships, attitudes and beliefs, social norms and behaviors, the formulation and implementation of official policies, laws/regulations and budgets and company policies and practices, in ways that promote more just and sustainable societies without poverty (Oxfam National Influencing Guidelines, 2015, internal document). Influencing includes a combination of tactics, appropriate to context, including leveraging program experience, creating alliances, public engagement, undertaking research to inform strategy and/or policy proposal development, advocacy and lobby, communication work (including digital spaces), mobilizing activists, supporters, citizens, capacity development (of citizens, partners, CSOs and duty bearers) and developing networks at local, national and global levels, aiming to change policies, practice, shifts in behaviors, attitudes and beliefs, and strategic financing. The approach includes a power analysis, stakeholder mapping, context analysis; robust theory/theories of change; appropriate risk appraisal & management; and capacity assessment (of Oxfam staff and partners).

How did the strategy address unequal power relations (including those related to gendered power relations)? To what degree was the strategy coherent with the program intent (as distinct from a general application of all of Oxfam's influencing tactics)? How did the influencing strategy support the programs' strategic intent?

## **Impact at Scale**

Within Oxfam, there are two interpretations of the phrase "impact at scale", which are particularly evident in practice; while these interpretations co-exist within the confederation and even internally within affiliates themselves, they are fundamentally different. The first is scaling up a program to reach more people; this sometimes happens after a pilot has been successful and the opportunity exists to extend the reach of the initiative. For example, a program might be taken to scale from implementation in one specific location to cover the entire country or even multiple countries, expanding the reach from 100,000 men and women to 2 million. The second is proposing to reach impact at scale from the start by using an approach that targets changing systems through influencing, so that the impact is potentially huge in scale. The types of strategies to get to this type of impact at scale are influencing governments, large multinational corporations, the World Bank, ASEAN etc. Because both types of impact at scale have been used within Oxfam (and with partners), it is important to acknowledge them. Nonetheless, it is this second type that is of more strategic interest; the questions posed below refer to that type of influencing at scale.

What examples of impact at scale exist? How did these different initiatives emerge? How did they evolve? How did Oxfam and partners use relationships and resources (investments) to achieve impact at scale? Consider mobilization and alignment of organizational structure, competencies and people. How did Oxfam and partners resolve challenges that emerged from these efforts? What more do we need know about the challenges Oxfam faced in our efforts to scale up?

## **Putting Women's Rights at the Heart of All**

Oxfam has committed to putting women's rights at the heart of all we do. This means that programs in Oxfam should move beyond gender mainstreaming to address gendered power relations and advance women's rights effectively. This entails the following:

- address the transformation of power relations in its 4 dimensions (individual, systemic, formal and informal)
- support the development of capacities and opportunities for women to participate in decision-making at different levels (household, community, public spaces)
- promote increased individual self-esteem and confidence of women and girls
- strengthen organizational capabilities of WROs

How has Oxfam organized itself to support women's rights? How has Oxfam evolved in its way of partnering to advance women's rights? How did the programs effectively link community, national, regional and / or international levels to advance women's rights? How is accountability for women's rights exercised in the programs? What questions remain around the work moving forward?

**Active Citizenship** (*distinction between active citizenship as strategy versus active citizenship as social good*)

How have Oxfam and partners supported active citizenship? How has the strategy of active citizenship addressed unequal power relations? How have Oxfam and partners evolved and adapted in the way we work toward active citizenship? How did Oxfam and partners resolve challenges that emerged from our programs?

How has Oxfam explored new opportunities to increase our scope with youth as active citizens? How has Oxfam evolved in its way of partnering to engage with youth as active citizens? What is Oxfam learning about this relationship that can inform a future strategy?

## **Partnership**

*For Oxfam, partnership encompasses those bilateral relationships with other civil society actors, as well as broader forms of engagement with coalitions, networks, and alliances, and stakeholders from the private sector, the media and academia.*

As Oxfam has deepened its understanding of unequal power relations, it has better articulated long-standing questions about the balance of power in partner relations. Over the last few years, Oxfam has supported efforts to improve understanding of what partners' value in their relationship with us, as well as innovative experiments to change the way that Oxfam approaches partnership. The Oxfam 2020 vision of global balance brings a renewed commitment from Oxfam to examine its relationships and explore new avenues to establish partnerships, where these are not necessarily mediated by funds but rather common objectives. This is an on-going effort.

What mechanisms does Oxfam have in place that supports transformation in its way of being a partner and how has that transformation happened? How have Oxfam's efforts to diversify partnerships been working? What other partnership efforts/instruments should be explored? What do our partnerships reveal about Oxfam's level of ambition? What information exists about 'transformative collaboration' and how it looks or should look?

## **Thought Leadership**

Thought leadership is characterized by Oxfam offering a unique perspective / understanding on an issue that brings quality to an exchange on the same. It means being on the cutting edge of debate and practice, with a strong understanding and evidence base to ground expertise. It generates discussion & experimental practice in a collective process of finding answers. It has 3 key elements: the discussion / practice must be pushing into new/novel territory; it must lead to change in the receivers (in thinking, attitudes and behaviors), and it is defined by the receiver. It is seen in new ideas and/or new framing of an issue, and is done to advance debate in the sector, to improve practice and to increase our credibility.

How did Oxfam and/or partners provide thought leadership in the thematic or programmatic space? How did Oxfam enable the development of thought leadership (incubation of new thinking)? How does Oxfam empower different stakeholders / partners to be thought leaders? How did thought leadership make a difference to program success? How are we proposing counter-narratives aimed at structural change?

## **Knowledge and Learning**

In the context of Oxfam 2020 vision, Oxfam recognized the currency of knowledge and the strategic importance of becoming a knowledge-based organization.

How are the programs demonstrating the commitment to learning and improvement? How has Oxfam mobilized its resources (structure, competencies and funds) to support learning, including from failure? How is learning accessed and used by different people in Oxfam (in terms of geography, gender, seniority)? How does Oxfam learn (including from failure) with partners? How has Oxfam used learning, in particular learning from failure, to improve its programs and/or its strategic direction? How has learning contributed to improved program outcomes? How is accountability for learning (including learning from failure) exercised in the program?

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## OXFAM

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