

Promises to keep
Evaluation of the implementation of *Towards Global Equity*,
Oxfam International's strategic plan, 2001 – 2006,

Volume I: Synthesis Report

Executive Summary

Please note we have employed the term **Oxfam** throughout the Synthesis Report as a synonym for Oxfam International. Where necessary and appropriate we have referred by name to specific affiliates, the Oxfam International Secretariat or other OI bodies.

1. Introduction

Towards the end of 2005, when this Evaluation was nearing completion, the “World Trade” Organization was again failing the world’s poorest farmers and workers and their families. Kashmiris were dying from exposure and cold-related diseases while winterized tents remained locked in military warehouses. Victims of the 2001 Gujarat Earthquake were still living in “temporary” shelters. Humanity’s first global warming refugees were being evacuated from islands in the Pacific. In Britain, a study announced that achieving equality for women would take another 200 years.

Much of Oxfam’s work during recent years has focused on these and similar problems. Their causes lie in global policies and practices but their effects blight and destroy the daily lives of the majority the world’s women, men and children; whole families and communities.

Assessing and measuring the value of Oxfam’s thematically diverse and geographically widespread efforts can only be attempted by looking at examples of its interventions and by forming educated guesses as to their wider significance. Between June and December 2005, two teams evaluated samples of Oxfam’s work during the period 2001-2005. They produced 15 reports, the complete versions of which are in Volume II of this Evaluation Report.

Working to terms of reference¹ agreed by Oxfam’s Learning and Accountability Group, the evaluation teams approached the different sectors through a common framework which asked four basic questions:

- **Context:** What changes in policies and practices have caused significant and positive impact on the lives of people suffering poverty and injustice has taken place in the period (irrespective of Oxfam’s interventions)?
- **Outcomes and impact:** What has been Oxfam’s contribution to these changes?
- **Value added:** What value have Oxfam’s “models of change” added to Oxfam’s interventions?
- **Lessons:** What are the implications of this Evaluation for the future?

¹ Terms of Reference: see Annex 3

These four questions provide the framework for the first part of this Executive Summary. In order to find answers to the questions the teams evaluated a selection of Oxfam's interventions in sectors of the rights-based Aims which underpin the strategic plan²:

1. Trade, markets and assets sector (Aim 1: right to a sustainable livelihood)
 - The overall Make Trade Fair Campaign
 - The Cotton Dumping Campaign (with particular attention to West Africa)
 - The Labour Rights Campaign (with particular attention to Indonesia, Colombia and Morocco)
 - The Coffee Campaign "revisited"
2. Education sector (Aim 2: right to basic social services)

The evaluation of Oxfam's work in increasing girls' access to quality basic education looked at the joint and individual work of four affiliates in Burkina Faso, India, and Mozambique, and the international campaign.
3. Humanitarian response sector (Aim 3: the right to life and security)

This sector is represented by a global contextual review of recent trends; an evaluation of four of Oxfam's responses (Hurricane Mitch, the Gujarat Earthquake, the Ethiopia Drought and the Darfur-Chad Crisis); and evaluations of the Humanitarian Consortium and the Tsunami Fund Management Team.
4. Gender equality sector (Aim 5: the right to an identity)

The evaluation reviewed external trends and developments; Oxfam's architecture and the lessons of Oxfam's work in Bangladesh, Ethiopia, Nicaragua and Palestine. The Evaluation treated Gender Equality as both a separate issue in its own right as well as a "cross-cutting" issue.

The four sectors provide the framework for the Main Report. This Executive Summary presents, in a very condensed form, our key findings, conclusions and recommendations. In the following section (2) we offer eight "headline" observations which (in our view) express the most important general messages we want to convey to Oxfam's senior managers. These are followed summaries of findings and conclusions regarding Context, Outcomes and Impact, Models of Change and Gender in the sector evaluations. Sections 7 and 8 summarise the Lessons for the Future. Section 9 summarises what we have learned about the methodology and approach adopted for this Evaluation and offers some recommendations regarding monitoring and evaluation.

Fuller summaries of the findings, conclusions and recommendations of both the internal and external evaluations appear in the Main Report following this Executive Summary. The complete internal and external sector evaluation reports are contained in the (separate) Volume II of the Evaluation Report.

Annexes 1 and 2 add further dimensions. Annex 1 summarises the conclusions and recommendations of the 2004 Mid-Term Review³ and compares them with the outcomes of this Evaluation.

² "Voice" (part of Aim 4) has been treated as a "cross-cutting" issue. It has manifested itself mainly in relation to the campaigning aspects of MTF, national campaigns in education and parental/community involvement in education delivery.

³ Sally Burrows and Linda Kelly. Mid-Term Review of the OI Strategic Plan 2001-2006. August 2004

Annex 2 (“Perceptions of some key actors”) summarises responses to interviews with six affiliate Executive Directors and five Lead Regional Managers. Annex 3 contains the Terms of Reference and Annex 4 recapitulates the main recommendations of the Evaluation.

2. Eight headlines

1. The Make Trade Fair Campaign shows what Oxfam can achieve at its best. Oxfam’s footprints are evident in global and national policy and practice changes in labour rights and agriculture. There is also some evidence of positive changes in the lives of working women and poor farmers. But MTF has also exposed Oxfam’s vulnerabilities: shifts in focus and discontinuity of effort; unwillingness to listen to others and difficulty in integrating regional and field concerns.
2. Decreased priority during this Strategic Plan means that Oxfam’s work in the education sector, though showing positive effects in its own terms, has not realised its earlier potential. Oxfam needs to face up squarely to the implications of its rights-based approach and its involvement in service delivery in the education sector.
3. Organisational changes in Oxfam’s humanitarian response sector have demonstrated their value – most visibly in the Tsunami response (further Tsunami response evaluation will add to these findings). But much work remains to be done at affiliate level to ensure a consistently high level of quality. Affiliate preoccupations sometimes jeopardise the excellent intentions of the Humanitarian Dossier.
4. Mainstreaming efforts to promote gender equality has failed. Gender expertise has become marginalised and a considerable investment in staff education, training and management is needed to reverse the decline in Oxfam’s commitment to promoting gender equality as an intrinsic part of the rights-based approach. Examples of good practice, as in Labour Rights and the CAMEXCA Women’s Rights work, are admirable – but exceptional.
5. The beneficial effects of Oxfam’s “models of change” are visible in all four sectors. They need to be articulated more clearly and given practical and consistent application in day-to-day programme development, planning and management. In particular, as suggested in headline (2). Oxfam’s approach to the rights-based approach needs to be more consistent across the board.
6. In all four sectors we find examples of field-level programming empowering and equipping poor people to benefit from policy changes which Oxfam is campaigning to change: but these examples are not the norm. The “one-programme” reforms in OI-level architecture have not yet been replicated throughout the confederation.
7. Trust, complementarity and cooperation among affiliates are being achieved in pockets of the confederation’s work. Affiliates have differing perceptions of the cost-benefits of collaborating in the confederation. Managing the power imbalances and tensions that could block Oxfam’s progress demands courageous leadership from the Board and Executive Directors.
8. The Evaluation did not study the evaluation systems or capacities of all affiliates. Oxfam International confederation lacks a coherent system for quantitative and qualitative programme and financial information to support monitoring, evaluation, learning and accountability and as a solid advocacy platform.

3. Changes in the lives of the poor and marginalized

We asked the evaluators to look first at the wider context of Oxfam's work in each of the four sectors. What significant changes are taking place in the policies and practices that cause, sustain or combat poverty and injustice?

In the economic sphere, the evaluators focused on the continuing debate regarding the contribution of trade to development; the relevance of achieving trade justice to poverty reduction; progress and regression in labour rights.

- Regional Trade Agreements and Bilateral Free Trade Agreements have proliferated during the last five years. By the end of 2004 such agreements accounted for nearly 40% of world trade. The conditionalities of such agreements for developing countries are usually **more stringent than in the WTO**.
- The World Bank has reduced its estimate of the potential impact of the Doha Round on global poverty reduction. Critics note that for most people any positive **changes will be incremental rather than transformative**. Complementary measures might have a greater impact on poverty.
- Many governments (particularly in Latin America) have become more attentive to civil society and expert criticism of **the emphasis on free trade**.
- Trends such as increased Foreign Direct Investment, the stronger influence of multilateral agreements and of international bodies and TNCs have not translated into better working conditions in Asia. The increasing mobility of capital could **undermine labour movements' efforts to secure workers' rights** and improve their living conditions.
- In China, policy and legal changes on labour have been positive but there remains considerable scope for the widespread abuse of labour rights abuses, particularly for migrant workers and women. There is evidence that education programmes initiated by workers (rather than boycotts or shaming) have potential but this is not reflected in the literature, in which the **voices of Northern NGOs are predominant**.
- In Indonesia, successes are being achieved through partnerships between trades unions and NGOs, where **local pressure combined with international campaigning** gives significant leverage.
- Despite the progressive legislative framework in Sri Lanka, abuses persist, with **women being concentrated in low-paid, low-skilled sectors** where the application of labour laws is most difficult.
- Morocco's textile workers (75% women) have been severely affected by the end of the Multi-Fibre Agreement. A new labour code approved by Parliament brings increased flexibility for employers and benefits for workers. The challenge is to **extend these gains to the informal sector**.
- Labour standards (including wages) in Colombia have fallen while the economy has grown. Trade reforms have contributed to **rising wage inequality**. Meanwhile the World Bank's "Doing Business in 2006" report cites Colombia's labour laws as rigid and ranks the country as 130th out of 155 in terms of ease of hiring and firing workers.

In the education sector the evaluators note:

- In 2005, according to UNICEF, 120 million primary school-age children are out of school. Thirty-five million of them are in India and **60% of these children are girls**.
- The global target of gender equality in education by 2005 has been missed in 94 countries. On the positive side, between 2000 and 2002, **primary gross enrolment in Sub-Saharan Africa rose from 83% to 95%**, much faster than in previous decades.
- The Education for All initiative has been the dominant campaign for a decade and a half. It has successfully marshalled debate, research and resources. However, in Africa there is considerable **weakness in local institutions' capacity** to sustain their own policies rather than those of their dominant external funders.

- UNESCO’s Global Monitoring Report for 2003 points out that bilateral aid for education fell by 16% between 1999 and 2000. Aid for education from OECD countries is increasing but is in decline from the multilateral donors and development banks. Current **support needed for basic education falls short of the US\$ 5.6 billion required** to meet the Universal Primary Education target and the gendered MDGs.

In the humanitarian response sector the evaluators make the following observations about the context:

- Some 50 million people currently live in countries or regions marked by protracted crises. The indefinite duration and political character of these crises are challenging humanitarian agencies **struggling between bringing basic relief to victims and defending their rights**.
- An estimated six million people live in refugee camps and more than 25 million people live internally displaced in their own countries.
- While the number of lives lost has declined in the past 20 years – 800,000 people died from natural disasters in the 1990s compared with two million in the 1970s – **the number of people affected has risen**.
- In the past two decades, direct **economic losses from natural disasters multiplied fivefold** to US\$ 629 billion. In 2003, 700 natural disasters killed approximately 75,000 people and caused US\$ 65 billion worth of damage (of which one third was insured).
- The debate over ethics in humanitarian action is not new. Ten years ago the “Code of Conduct” was drafted at a time when many donors were **transferring support from traditional development assistance to emergency relief**. A host of new, mainly non-governmental agencies came into existence. Ten years later, more than 300 organizations have adopted the Code of Conduct. The evaluator observes: “However, little reference is made to it in everyday practice and many have **questioned whether the Code is still a living document**.”

In the gender equality sector, the evaluator describes the changing context as follows:

- Although there have been amazing gains in the past generation, **the speed of change has declined** since 1995.
- Positive developments include the **narrowing gender gap in education**; the **legal protection** of women’s rights; improved **property rights** for women and increased representation in **decision-making**; **working conditions** have improved for the increasing numbers of women in the labour force.
- On the downside, the face of **poverty is overwhelmingly female** as the rich-poor gap increases internationally. Women bear the brunt of **welfare cutbacks** and the privatisation of public services. Women have not broken through **the 20% barrier** in senior leadership. The increasing proportion of women with HIV/AIDS highlights **women’s continuing lack of control** over their own bodies and lives, despite rhetoric, policies and laws.
- **Funding for women’s rights**, especially for research and policy advocacy and for learning, is static (and therefore shrinking).
- Northern, once politically strong national feminist movements “are but **pale shadows of their former selves**”.

4. Oxfam’s footprints: outcomes and impacts

4.1 Introduction: Trade and Livelihoods?

The following observations were prompted by a concern that the MTF Campaign might be criticized for failing to achieve “impacts” which it could not be expected to achieve on its own. In fact the successes of the Campaign shine a rather critical light on some other areas of Oxfam’s policies, structure and working methods, where a lack of coherence undermines good intentions.

At a late stage in the Evaluation, concern was expressed that the report would criticize the lack of evidence of Oxfam’s *impact* (changes in peoples lives) compared with the considerable evidence of *outcomes* (changes in the terms of debate, influencing policies and practices). This concern, though understandable, is misplaced. Both the internal and external evaluators appreciate and acknowledge that “positive and sustained changes” in people’s livelihoods need longer than the time span of a single campaign or a six-year strategic plan. (Some of the MDGs are regarded as unattainable even in fifteen years). “Too early to tell” is as true now as it was a year earlier when the Mid-Term Review drew a similar conclusion. It is indeed too early to tell, but we have to step outside that comfort zone: contributing to “impacts on people’s lives” requires constructing and operationalizing a causal network so that you are working on leverage points throughout the system.

This issue aside, however, concern about the “*outcomes to impact*” trajectory does lie at the heart of the evaluation, not only in relation to Trade and Livelihoods but also to other sectors. There are three main issues of concern.

- First, the coupling of “Trade” with “Livelihoods” in “The right to a sustainable livelihood” (Aim 1) was (unintentionally) ambiguous. It created unrealistic expectations as to what could be achieved at field level during the time span of one strategic plan. The complete vision was expressed (in Aim 1) but in implementation it attracted Oxfam-wide energy only through the MTF. The same level of collective energy was not invested in “livelihoods” because of slower progress in building strategic collaboration in that area.
- Second, it perpetuated at least the perception of a simplistic, linear cause-and-effect approach which ignores the importance of a range of external and (sometimes) unforeseeable factors in shaping people’s lives. As many have observed, you support unions in organizing for better conditions but this is only one of many factors affecting the economic security of working families.
- Third, the coupling of Trade and Livelihoods demanded close working cooperation between two quite distinct organizational cultures within Oxfam – the livelihoods programmers and the policy campaigners – at a time (2001) when they were even further apart than they are today (this was when the “Programme Directors” and “Advocacy Directors” committees were still functioning).

Two other, “beyond-MTF” issues are at play here. First, even acknowledging that there might be a gap of half a generation or more between a significant policy outcome and (resultant) changes in people’s livelihoods, the question arises of Oxfam’s seriousness about medium and long-term planning and programming. To what extent have the staff, partners and communities involved in Oxfam’s “livelihoods” work been prepared, empowered and equipped to *take advantage* of policy outcomes when they are achieved? And how seriously did Oxfam take the idea that staff, partners and communities might have valuable insights about policy-change priorities? While there is some evidence of this happening in the Labour Rights and Coffee campaigns and in the Educational Access sector, these examples of integration give the impression of being incidental and exceptional rather than the norm.

Second, even if the policy outcomes achieved by advocacy and campaigning were to result in “significant and positive changes” in poor people’s livelihoods, we would probably not know much about them because of the serious weaknesses in Oxfam International’s monitoring and evaluation systems, resources and capacities – an across-the-board weakness noted in all four sector evaluations. This report raises questions about the quality and coherence of Oxfam’s livelihoods-related work. Part of the doubt arises from that fact that very little of this work is visible on Oxfam’s collective “radar” – despite serious attempts to collate and analyse information at affiliate level, such as Oxfam GB’s annual Programme Impact Report.

4.2 The Make Trade Fair Campaign

Several achievements stand out as having advanced the MTF Campaign objectives and strengthened Oxfam as a whole. For example:

- Oxfam’s strong analysis, lobbying and campaigning work in late 2003 helped Southern countries act more assertively at the WTO in Cancun and the Summit of the Americas in Miami. Oxfam skilfully kept attention focused on US and EU policies as a reason for the failure of Cancun. Oxfam and more assertive southern governments continued to maintain pressure on the USA and EU until the 2005 Hong Kong Ministerial.
- The Labour Rights Campaign has demonstrated the potential for Southern campaigning to shift power dynamics and cause policy changes with direct impact on the lives of traditionally vulnerable and politically weak people. The combination of a robust analysis and argument; the linking labour, human rights and women’s rights and alliances with a focus on specific, actionable demands has been powerful and contains broader lessons for the future.
- Oxfam and its allies raised broad public interest in trade and collected more than 17 million signatures for the “Big Noise”.
- The Hemispheric Reference Group and regional teams (ECIP and SAM) have aligned trade work (especially around RTAs) and shown what can be achieved when regional staff are motivated and empowered to focus their energies. The architecture works, with strong planning and management; transferring learning from one campaign to the next and an integrated strategy. The OI Washington DC office has played a key supportive role.

The specific outcomes and impacts of the Labour Rights and Agriculture (Coffee and Cotton) campaigns are summarised in Chapter 2 of the Main Report and in full in the internal and external evaluation reports included in Volume II.

4.3 Girls’ access to education

The geographical focus of Oxfam’s field programming is small but it includes a country with one of the highest percentages of children not in school (Burkina Faso), one with the highest absolute number of children denied that right (India) and the country where the Oxfams have invested most programme expenditure in education (Mozambique). The most significant outcomes in this sector are those which show:

- How broad policy change and field-level programming are interrelated;
- How interdependent they are; and
- The importance of investing in and working on the connections between the two levels of work.

Oxfam-supported programmes in Burkina Faso and Mozambique were evaluated positively in terms of targeting areas where the right to education (especially for girls) has furthest to go. Enrolment, retention and completion figures increased in the Oxfam-supported programmes in Mozambique and the gender gap has diminished. Further details regarding programme outcomes in all three countries can be found in Chapter 3.

National level field programming has matured over the years in all three countries reviewed:

- There has been a shift in content and in geographical focus, including investment in national policy influence in Africa.
- Programme content has moved towards embedding Oxfam's programme in the government system, national education plans and/or PRSPs.
- This has also increased the number of people reached and positively affected.

The global campaign contributed to a positive shift in the international terms of debate between 1999 and 2005, which has led to some quantifiable, positive policy outcomes on increasing primary education for girls, especially in Africa.

At the global level Oxfam played an important role in maintaining attention to gender issues in GCE and donor government circles.

4.4 Humanitarian response

The evaluation of this sector included assessments of Oxfam's learning from a series of humanitarian responses from 1998 to 2005 and the extent to which the learning has been applied; and evaluations of the Humanitarian Consortium and of the Tsunami Fund Management Team. There is clear evidence of progress in the coherence and quality of Oxfam's responses from Hurricane Mitch in 1998 through Gujarat (2001), Ethiopia (1998-2002) and Darfur-Chad (2004-5). The following key points emerge from the Internal Evaluation Report by Pierrette Parriaux:

- The Ethiopia Drought was one of the first humanitarian crises which saw the transition from OI's previous strategic plan (*Towards an Ever-Closer Union*) to the current one (*Towards Global Equity*). An Emergency Harmonization Group was formed. There was information-sharing between affiliates and affiliates attended outside meetings on behalf of OI as a whole. Information-sharing among Oxfam affiliates was effective but hardly applied to local partners at project level.
- There is a clear evolution in the way affiliates have taken possession of and make use of the Humanitarian Dossier, although some field offices (especially in Africa) were slow in adopting the models and protocols due to difficult internet access and poor dissemination.
- With each succeeding emergency involving several affiliates, the system became more refined (not necessarily more efficient). The need for common services such as advocacy officer, security officer and a point person for information and media services become obvious. However the information flow is still imperfect.

With regard to the Humanitarian Consortium, the external evaluator concludes:

- For the most part the process targets have been met. The majority of EDs interviewed (within and outside the HC) responded that the HCMG has been effective and that it is a big step forward from the previous rather anarchic situation. However, leadership around humanitarian advocacy is seen as an area where process has been weak: the present setup is not providing sufficiently clear leadership and management for advocacy.
- Oxfam's response to the Tsunami was the critical test. The HC provided a framework within which all the affiliates could act. It allowed for decisions to be taken by a small expert group on behalf of all the affiliates. The scale and highly public nature of the response forced OI and the HCMG to act ahead of its time, proving the value of what the consortium approach can deliver even if, by its own admission, it is not always delivering such a coherent and well-led approach in other less high profile emergencies.
- The HC's key strengths are:
 - It has demonstrated that a skills based approach works better for OI than a simple all-representational approach;
 - The membership of the HC and the HCMG (humanitarian directors) has provided a vital link with the EDs

- The HCMG seems to have made a determined effort to link in well with Oxfam’s regional and field structure.

4.5 Gender equality

The evaluator found little evidence of significant outcomes or impact in this sector. The following summarises her positive findings:

In Ethiopia there is evidence of a shift in a number of Oxfam-funded NGOs to increase both their gender equality work, and to increase the inclusion of and benefit to women of their programming. There is evidence that women are not being forgotten in Aim 1 and Aim 3 programming. Women do receive grants of livestock, or nursery stock or seeds. Some women are trained in vegetable and poultry production. There is an effort to consult women in water harvesting programmes. Protecting assets in emergencies takes account of women’s assets (small stock) as well as men’s (camels and cattle.) Female-headed households are mentioned as beneficiaries in a number of projects. While it is impossible to attribute this directly to the interventions offered by Oxfam affiliates, (dialogue, training, financial support) it is very likely that Oxfam’s interventions contributed to this change.

In Bangladesh, programme reports indicate that Oxfam supports this expanded and integrated microfinance programming by supporting legal aid for women, monitoring the participation and roles of women NGO staff, and funding NGO-run primary education that is targeted to poor girls as well as boys. Most of the reports and evaluations do not look deeply at gender issues, and where challenges are mentioned, prescriptions for action are vague.

Of the four country programmes reviewed, Nicaragua is unique in that the Regional Strategic Team established a joint regional ‘Women and Rights’ programme as early as 1998. Like their local counterparts, Oxfam programmers working on women and rights concentrate their Aim 5 strategy with women’s organizations, and devote few resources to encourage mixed organizations to address gender equality concerns. Major areas of focus have been violence against women, indigenous women’s rights (mainly in Guatemala) and women in global production chains. They mark progress and results in the following areas:

- Understanding and agreement among RST members that gender equality is important, and increased knowledge of how to analyze and approach gender equality issues in all of Oxfam’s work;
- Effective collaboration in the design and implementation of Trading Away Our Rights. Improved conditions for women workers in the region were one outcome, as was stronger and more effective collaboration among a range of organizations to win them;
- Mutual support and learning among the RST committee on women and rights, and stronger links among and outside Oxfam affiliates;
- The development of a regional Aim 5 strategy to align with the next OI strategic plan.

The Labour Rights Campaign is also cited as a positive example of gender equality programming.

5. Added value: Oxfam’s “models of change”

The Trade, Education and Gender evaluations included reviews of the extent to which Oxfam’s models of change were being adopted and implemented, and of their added value. (This issue was not addressed in the Humanitarian Response sector evaluations.) Discussion and definition of these “models of change” has continued during the Plan period and we have included what appears to be the currently agreed list.

There are two issues: first, Oxfam's ideas regarding theories and models of social and economic change; second, Oxfam's ideas about the models it employs in contributing to change. Both need to be articulated further in the development of the next strategic plan.

5.1 The rights-based approach

Trade markets and assets sector

The use of rights language to hold governments and TNCs accountable for their actions based on standards of fairness or rights has been effective as far as it has gone. Nevertheless, it was only in the case of the labour rights campaign that rights were the point of departure and an organizing principle for devising strategy. This suggests that the RBA could also have strengthened other MTF campaigns – but there is no hard evidence to support this.

Education sector

The RBA has helped in clarifying the NGO role in education in general and Oxfam's in particular, alongside the primary duty-holder, the state. Externally, it provides a good entry-point and common language for alliances and helps civil society organisations and citizens to be more assertive. Internally, it promotes greater coherence.

However, there has been no conscious plan and very limited staff training for applying the RBA in programming. Opinion is divided between staff who see it as having under-used potential and those who see its further potential to challenge power relations that maintain poverty as limited.

Gender equality sector

All of the Oxfam gender policy statements reviewed for this study are unequivocally based on rights. A rights rationale is used to support programming on political and civil rights of women as well as economic and social rights. Oxfam was ahead of the curve in this understanding, although there is now general agreement that the case for gender equality is rooted in human rights. Most Aim 5 programming is now proposed on a rights basis, while commentary in proposals and reports on 'cross-cutting' in programming still tends to be utilitarian.

5.2 Programme integration

Trade markets and assets sector

In MTF, Oxfam has made considerable progress in achieving vertical alignment, aligning campaigning with other program activities, and acting as Oxfam International instead of a dozen independent affiliates. In those Regional Teams involved in the campaigns, it is evident a positive tipping point has been reached in this regard. However, the debate as to the cost of achieving "one programme" synergy versus the opportunity cost of failing to achieve it remains unresolved. Campaigning on an issue on which Oxfam has no field-level programming experience raises issues of mandate and credibility. But should the lack of such a basis prevent Oxfam from speaking out when its voice might make a difference?

Oxfam has made important steps toward better integration, with adjustments in the trade campaign architecture and more investment in regional campaigning capacity. Oxfam needs to further invest (funds, time, and energy) in West Africa and East Asia to consolidate their capacity and develop a strategy for more fully incorporating the majority of regions that are not so engaged.

Education sector

Only one of the three country programmes does not explicitly attempt to create coherence and synergy between different levels and kinds of intervention. Affiliates feel they have made considerable progress on this, though there is still room for further improvement. The education sector confirms the OI Mid-Term Review finding (for other sectors) that creating synergy between kinds of intervention has a direct, positive effect on levels of intervention.

Gender equality sector

Oxfam's research and campaigning on women's labour rights and precarious employment, Trading Away Our Rights is the first example of local-to-global and functionally integrated programming that demonstrates how a strong gender analysis can strengthen Oxfam's work and make a significant contribution to gender equality. The labour rights work built strong links between actors whose strategic collaboration can have significant impact (trade unionists, women's and feminist organizations and academics).

5.3 Strategic collaboration

Trade, markets and assets sector

Affiliate strategic collaboration has increased tremendously in the context of Make Trade Fair, particularly at headquarters level and in the different campaign teams and working groups. Strategic collaboration amongst the affiliates in some regions still remains a challenge. This appears to be less about ideological differences and more of a capacity issue in most cases.

Education sector

There has been limited progress (mainly at field level) and added value in three ways:

- All 12 affiliates are engaged in campaigning internationally and/or in their home countries on the basis of field programmes of four affiliates.
- Second, there is some joint programming in Burkina Faso and Mozambique, reducing management overheads. This is absent in India.
- Third, there is a country-level education working group in Mozambique, which appears to have contributed to some convergence on good practice between affiliates.

Nevertheless, strategic collaboration is the area in which the highest number of staff interviewed saw need and potential to do much more, though others are more cautious. There is also evidence of missed opportunities and brand risk from failure to collaborate.

5.4 Global campaigning force

Trade, markets and assets sector

MTF is proof, in many respects, that campaigning works – Oxfam has changed the terms of the debate, it has generated massive interest in trade issues, it has been a catalyst, a facilitator and a valued participant in an array of alliances. However, as many Oxfam staff have mentioned, policy change on the scale Oxfam is seeking takes a long time. Oxfam injected much needed, high quality analysis into the trade debate, but has learned that achieving and sustaining policy change requires sustained investment. Oxfam should address three questions:

- How to set priorities that balance global and regional needs, opportunities and constraints;
- Are campaign resources deployed to maximum effectiveness to sustain policy change?

- How much does Oxfam want to invest in itself and how much in others?

5.5 Working in alliances

Trade, markets and assets sector

(See “Global campaigning Force”) above.

Education sector

This received by far the greatest investment and had the greatest added value (of Oxfam’s “models of change”). The main alliance, the GCE, has delivered influence on policy-makers in North and South.

Gender equality sector

Several informants noted that Oxfam gained significantly in its positive profile with the labour movement because of the quality of the labour rights work. At the same time, the bottom-up development of the research and the advocacy goals meant that allies felt they had a strong stake and say in the work and gained similar recognition. (This was reported both from South African partners and Colombian partners). This sets a new Oxfam standard for collaboration: there is recognition of Oxfam’s leadership and contribution, while at the same time there is similar recognition for partners in their own context – a win-win combination. Oxfam’s added value was its ability to convene; deep knowledge by the labour rights team of gender issues and pitfalls as they occur in a wide variety of contexts; Oxfam’s global-to-local links; and its policy, advocacy and campaigning know-how.

5.6 Oxfam brand

Trade, markets and assets sector

Through MTF the Oxfam brand has become much more widely recognized globally, in affiliate countries and in the regions. This helps Oxfam position itself as an important and generally respected actor in trade and development issues. At the same time, a strong brand presents challenges in alliances.

Education sector

Generally, its value is seen as insignificant, or even negative, for work in the South, but often very important for advocacy and campaign work in the North.

6. Gender in the Trade and Education sector evaluations

Trade, markets and assets sector

The Labour Rights Campaign demonstrates the power of a gendered analysis and strategy for delivering results. Everyone involved in the campaign, up to the OI media coordinator, was conversant with the gendered nature of the campaign. There is unanimous agreement among Oxfam staff that this made the campaigning stronger conceptually, but also in its appeal and effectiveness.

Gender analysis does not feature as explicitly in other MTF campaigns as in Labour Rights. Gender is touched on in policy documents but is not strategically integrated in campaign planning. It is noticeable, for example, that the quantified outcomes of much of the Coffee Campaign are not disaggregated by gender. Women's organizations played an important role in the RTA campaigning in the Americas but this was neither planned nor reported on from an explicitly gender equity point of view.

Education sector

Most programmes reviewed have gendered objectives, but only the programmes in Mozambique were found to have a clear gender strategy to meet these. Most have at best a 'Women in Development' strategy, focusing on improving women's participation in the existing society, rather than changing the power relations between the genders. This risks verbal expressions of change only. Others deliberately avoid provoking a backlash from men.

There is some evidence that the Mozambique gender strategy is a factor in improved girls' enrolment, retention and completion rates. Oxfam experience confirms that gender disparities in primary education are related to three main cultural and economic blocks: parents' (in)ability to see the value of educating daughters; the loss of female labour for the household; and concerns about girls' security in school.

7. Lessons and recommendations: (a) the sector evaluations

The distinction between “lessons” and “recommendations” is not always explicit in the sector evaluation reports. In order to assist readers, we have emphasized the “action points” in the following sections. There is also a Summary of Main Recommendations at Annex 4, which can be used as a checklist.

7.1 Trade, markets and assets

- The major substantive issue concerns focus and priority-setting. As noted above, MTF demonstrates what Oxfam can achieve when it is focused. The current plan gave priority status to Trade and Livelihoods in Aim 1 and Humanitarian Response in Aim 3. These are two distinctive (“stand alone”) and substantive areas of work. Despite Oxfam's substantial achievements in both the Trade and Humanitarian Response sectors, **there is a need to consider focus and priority-setting in these areas**. In addition, questions arise as to the legitimacy, purpose and positioning of Oxfam's work in Basic Social Services (i.e. Education and Health).
- If Oxfam is to reap dividends from its work in the Trade and Markets sector, there is a clear need to set priorities, realistic and measurable outcomes and **to ensure that campaigns are sustained** either directly (by Oxfam) or indirectly (by Oxfam-supported allies) once the focus of global campaigning has moved on.
- Oxfam should address the challenge of **raising the quality, scale and significance of its field-level livelihoods programming** to the same levels achieved by the Make Trade Fair Campaign programme during the last five years. **Future planning should ensure that these two approaches to achieving “sustainable livelihoods” are fully synchronized and mutually supportive** rather than being (in some areas) “ships that pass in the night”.
- The regions that have been most effective in engaging in campaigning are CAMEXCA, SAM, East Asia and West Africa owing to strong leadership and committed staff. But even in these regions, **capacity constraints have limited their potential and should be addressed**.

- Significant lessons have been learned intra-regionally, but there is very limited cross regional learning. **Oxfam would benefit from institutionalizing and deepening the learning practices** of the Hemispheric Reference Group and the Labour Rights team. Those teams would add far more value to Oxfam if they **documented and disseminated their experiences**.
- Taking a global perspective on poverty, MTF has generated critical reflection on the part of some regional staff on **the need to address the (in)adequacy of Oxfam-supported rural development programs**.
- The high impact strategy around livelihoods has focused on trade and the predominant question has been, “How do we campaign on this?” In the next cycle, more balanced attention should be paid to the other components of integrated programming for the right to a sustainable livelihood. **The point of departure for planning should be:** what is the full range of interventions that would be needed to achieve a development goal (e.g. achieve sustainable livelihoods in specific and significant geographic areas)? What is Oxfam’s value added at the local, national, and international levels? What is the universe of potential allies; what might the division of labour be, and what level of investment is Oxfam willing to make?
- **Oxfam should extend the positive experiences of MTF** with the one-programme approach to other sectors.
- **If integrated programmes are to realise their full potential**, partners and Oxfam staff working directly with target population groups will need;
 - To develop their capacity to help identify needs and opportunities for campaigning on relevant policies and practices; and
 - To concentrate on equipping and empowering target populations groups to take advantage of the positive policy and practice changes that are achieved.

7.2 Education

- **There is a need for debate and decision about Oxfam’s future in the Basic Social Services area** – specifically, Education and Health. The evaluation reports on the Education sector challenge Oxfam to define its interest and role in this sector. Does Oxfam support education as a means to various ends (gender equality, community ownership and participation, democracy) or as an end in itself? If the former, would it not be more effective to promote these ends through the trade, livelihoods and humanitarian response sectors where Oxfam has achieved and demonstrated competence and leadership? The (education) external evaluator asks: Is Oxfam achieving anything in education *per se* that could not be equally well (or even better) achieved by more specialised agencies? Is service delivery (“gap-filling”) a legitimate function for an NGO which claims a rights-based approach?
- There has been mixed progress in learning from the evaluation of the 'Education Now!' campaign in 2001 (and some lessons have also been taken up in the Trade campaign):
 - There has been huge improvement in increasing popular campaigning, campaigning to Southern national governments, and working with others
 - There has been some improvement in developing corporate knowledge and skills, especially in field programme, and partial improvement on working with each other.
 - There has been low or no improvement in power analysis and strategising, internal Oxfam coherence, mutual accountability between affiliates, clarity on a sectoral or holistic approach, and individual and collective responsibility.

Lessons emerging from this (2005) Evaluation:

- Continuity and sustained pressure are now recognized by staff as essential to success. Greater complexity (absorbing education in the MDG Campaign and then in GCAP) and lower priority do not mix well. **Oxfam needs to think through more carefully the internal implications for staff and management, when a campaign is in a low-key phase**, in order to avoid losing past gains and reputation.
- Oxfam is still not explicit about whether education is a means or an end. Implicitly, Oxfam seems to see education as a means to the broader end of sustainable livelihoods, peace and security and the right to be heard, regardless of gender and identity. If this were made explicit, it would give a stronger steer for focus and choice of strategic priorities in education. **Oxfam should be more strategic** – success comes where there is solid power analysis as a base for a holistic, localised strategy for policy and practice change.
- There is a virtuous spiral between the right to basic education and the right to be heard, as shown by the role of School Councils. There is also a potential virtuous spiral between attention to gender as a cross-cutting issue and field programme impact. Attention to factors enhancing or inhibiting girls' success in school brings out issues (e.g. on teacher training and curriculum) that, if successfully addressed, are likely to benefit all children.
- We found patchy evaluation systems in affiliates and no common monitoring, evaluation and learning system in OI.
- **Oxfam's education programme should focus on areas that are key factors in success in contributing to achieving gender parity** (in school access and success) and in deepening democracy.
- **Oxfam should strategize on education with a 5-10 year perspective in selected countries** with strategic partners and allies and a continuing campaign agenda, including local-to-global linkages.
- **A defined level of strategic collaboration between participating affiliates should be obligatory, not optional.**

7.3 Humanitarian response

- The Humanitarian Advocacy Coordinating Team (HACT) was particularly involved during the lead-up to the (2nd) Iraq War and with the situation in the Sudan. The HACT has not always been able to achieve its ambitious goals.
- In several responses, including Mitch and Gujarat, expatriates were not familiar with the local context. In particular in Mitch the language barrier was a real impediment. **Understanding the political context and establishing diplomatic relations** at all levels is still at an early stage in Oxfam. In Darfur, for example, MSF and ICRC had access to areas that were off limits to other organizations.
- The gap between the high quality of Oxfam's humanitarian vision, quality standards and other objectives and actual practice should be narrowed. **Improve timeliness of response through improving management capacities**, the availability of trained staff and better analysis of field realities and government policies.

- In countries like India, where governments have emergency response capacities, **Oxfam should establish stronger links with state governments and agencies.** In other contexts, such as Sudan, understanding the political economy of war and developing diplomatic contacts before the crisis would help the people in the field.
- Building the preparedness of national staff and partners to emergency response in vulnerable areas has been started in Central America and parts of Asia but is well behind in Africa. **An Oxfam introductory training should be developed** for all existing and future employees.
- The majority of evaluations provided by affiliates responding through partners do not include enough consideration of the pluses and minuses. There is a lack of systematic quality evaluation based on a common framework.
- **Special action should be taken to ensure that the Code of Conduct and Sphere standards are effectively disseminated to all affiliates, understood and applied.**
- Most of the documents reviewed ignore gender, generation and the protection needs of specific groups. The OxAus evaluation of Gujarat was the only exception. **The next OI strategic plan should focus on the transformation of rhetoric about gender, generation and protection into action.**

The Humanitarian Consortium

- We can assume that the demands on Oxfam's capacity for Humanitarian Response will increase rather than diminish, challenging affiliates to apply the lessons learned from the many emergencies of the last five years, and to take the appropriate decisions regarding empowering the Humanitarian Consortium to fulfil its mandate on behalf of the confederation as a whole. Key issues include relations and communications between the HCMG and the rest of the confederation (especially non-member affiliates); making a reality of the "lead agency" concept; **replacing the destructive inter-affiliate disagreements about direct and indirect interventions with a research-based debate about the appropriateness of both approaches in different scenarios.**
- While HCMG process seems to have been going well, it is less clear that outputs and outcomes are robust. Investment plans still fall far short of what is needed. Many recent OI humanitarian operations have made less use of the new OI philosophy, structures and procedures and have had to fall back on an older model, with the major affiliate in the country taking the lead.
- A clear gap is the apparent lack of any system to provide metrics for OI humanitarian operations. Basic questions like how many operations have there been in the last year to assist how many people with what success cannot be answered. There is no regular generation, collection and collating of data.
- Without the HC, Oxfam's disaster response operations would remain single affiliate affairs. Each Oxfam would develop its own style, competence, standards and working methods. OI would not be able to realize its full transnational potential. **The immediate challenge for the HC is to help the field employees and management systems of the affiliates put the agreed standards and systems into practice in a consistent way.**
- Key weaknesses are;
 - The much felt lack of information flow from the HCMG to non-HC affiliates.

- The relationship between the HCMG and OI's advocacy around humanitarian issues looks satisfactory on paper but in practice is not working as well as it needs to.
- The relationship between HCMG's investment aspirations and the line management functions of all affiliates. The HCMG is a leadership structure, not an exclusive club. The proposals from OxAus to build an OI-wide roster of skilled individuals suggests that an Oxfam-wide approach is possible.

The Tsunami Fund Management Team

The following points from the study indicate the stronger and weaker aspects of the TFMT.

- The TFMT has taken its managerial role seriously and has been innovative and pragmatic in finding solutions to unprecedented problems.
- However the structures into which the TFMT fed not been equally effective. In particular the HCTs faced the challenge of having to work together for the first time. Although affiliates' internal systems are finding it difficult to adapt to the needs of a common fund, the establishment of the Fund is seen as very positive...

7.4 Gender equality

The evaluation confirms the MTR's conclusions: Oxfam has good gender policies and systems but the contribution to gender equality in programme development and implementation is mediocre – with a few exceptions.

- Knowledge and understanding of Oxfam's gender policies and their implications for programming has **had decreasing attention and investment** over the period of the strategic plan and has become an excuse for lack of attention to the practical application of gender analysis in day-to-day work.
- The coherence of the Labour Rights Campaign, demonstrates what a strong, gendered analysis, research, alliance-building and field-level programming can achieve - but is almost exceptional. An equally successful – but also exceptional – example is the positive energy generated by the Women and Rights programme in the CAMEXCA Region, which shows what can be achieved through smart strategic alignment.
- **Oxfam needs to focus (in the gender area as in so many others). Building on Oxfam's strengths, it would make sense to develop a confederation-wide gender equality programme** integrated with an area where Oxfam already has experience and a good track record. Possible areas of work include:
 - Taking women's labour rights further;
 - Women's leadership in humanitarian response;
 - A focus on gender in primary education;
 - Women and PRSPs;
 - Women and violence.
- The Labour Rights Campaign and the CAMEXCA Women and Rights demonstrate the added value of vertical and strategic alignment (the one programme approach and smart collaboration between affiliates). **These virtues should be combined in a new Aim Five programme** which would benefit from OI's increasingly integrated architecture.
- **Spending targets for gender equality work should be established – and honoured** – in the next strategic plan. Similarly, gender equality criteria for grant-making – along the lines of Novib Oxfam Oxfam's "traffic lights" system – should be adopted by all affiliates.

- OI-wide, **bring in external resources to consistently and jointly develop staff and partner capacities** in integrating gender work in all sectors of programme development, implementation and management. Underpin this education and training process with confederation-wide monitoring, evaluation and learning using gender equality as a pilot for an enhanced LAG strategy. Ensure these improvements are taken seriously by reporting progress and setbacks at Board and ED levels.

8. Lessons and recommendations: (b) Oxfam-wide issues

While many of our conclusions and recommendations are sector-specific, some have wider implications for Oxfam as a whole. There are a larger number of organizational issues which also require resolution and decision if the impetus achieved during the last five years is to be maintained and even surpassed. On the organizational side, the strongest messages emerging from the sector evaluations concern the following issues.

- Managing relative size and balance within the confederation continues to be a challenge. Oxfam GB's outstanding human resources, financial clout and global reach can sometimes have an intimidating effect on some (not all) affiliates in some (not all) situations. At the same time affiliates express different views about the role and mandate of the OI Secretariat. Some affiliate leaders wish to empower the Secretariat (or other central bodies) to carry out important tasks on behalf of the whole confederation while from one affiliate there are signs of irritation with the Secretariat's (alleged) "ambitions". The external evaluation of the Humanitarian Consortium presents in microcosm some of the issues facing Oxfam International as a whole and emphasises a) that such tensions won't go away and are the price all confederations pay for their consensual nature; b) **that the advantages of the confederation model can far outweigh the disadvantages only if c) the imbalances and tensions are acknowledged, understood and proactively managed.**
- Although the sector evaluations give credit to Oxfam's progress in alliance-building and alliance-membership, there is continuing concern about Oxfam's tendency to ignore the roles, contributions and views of others. These criticisms, expressed by some external evaluators and internal respondents, suggest a dangerously "Oxfam-centred" view of the world of development and humanitarian response.
- Oxfam remains predominantly Euro-centric and Anglophone. These characteristics affect the smaller affiliates and those outside Europe and of course have an impact on allies and advocacy targets. Much energy is (rightly) expended on brand development and protection: perhaps **the deeper question of Oxfam's identity deserves even more attention.**
- There is still far to go in establishing "one programme" integration between policy advocacy and campaigning, and service-delivery programming as the basis for work at all levels. **Stronger leadership and support is required to help Oxfam's professionals achieve coherence at the inception, design, planning, implementation and monitoring phases of campaigns.**
- **Oxfam should decide the level at which planning and programming should be focused for strategic collaboration: region or country.** Linked to this, the quoted examples of successful collaboration and joint programming at country-level suggest that **the idea of concentrating collaborative resources on a manageable number of integrated, scaled-up country-level programmes has several attractions** and would be do-able. Such an approach could be an entry-point for taking forward Oxfam's vision of strategic collaboration.

- Oxfam sets itself very high success criteria, particularly its definition of “impact”. While “significant and sustained changes...etc.” should of course remain the vision (and be supported by sector-specific criteria and indicators), **Oxfam should develop more meaningful and better-defined intermediate outcomes**. Repetition of “It’s too early to tell” is valueless for learning and management purposes and understandably demotivating for staff.
- Under-investment in monitoring and evaluation seriously undermines Oxfam’s collective learning and accountability capacity. All four sector evaluations underscore this. **Learning and accountability can only be achieved on the basis of rigorous and comprehensive monitoring and evaluation.**
- RSTs and LRMs value the increased support and respect they have gained during the last five years but are still aware of the gap between field-level programming and (mainly) HQ. **Oxfam has to decide on the level at which planning and programming should be focused for strategic collaboration: region or country.** Regions which do not conform to the conventional pattern (the Pacific, EEFSU and MEMAG) tend to be neglected by OI policy makers and planners, which affects programme potential.
- EDs make commitments about strategic collaboration and strengthening the confederation when they meet but sometimes appear to abandon them when confronted by affiliate preoccupations and priorities. This suggests the need for a) **more realistic commitments** at OI level combined with b) **more robust communication** with affiliate staff, supporters and back donors.

9. Methodology, approach and counting the cost

9.1 Introduction

This is the second evaluation of the implementation of Towards Global Equity. The first was the Mid-Term Review (MTR), conducted in 2004. We have tried to build on and not duplicate the findings of that review. Our mandate differed in three important ways:

- The MTR was conducted as a purely internal exercise (with some interviews with external respondents). This Evaluation has been carried out by internal and external evaluators.
- The MTR’s scope was limited to joint affiliate programmes and activities: this Evaluation covers both individual and joint work.
- The MTR did not include the education sector.

The parameters for this Evaluation were set by the Global Coordination Team (GCT), through the Learning and Accountability Group (LAG). The Terms of Reference for the Evaluation were approved by the LAG in April 2005⁴. Recruitment of the internal and external evaluators began immediately and work began in earnest at the beginning of June.

The teams studied a very small sample of Oxfam’s total output during the five-year period. These included interventions by individual affiliates as well as those involving joint work by two or more affiliates. The sector evaluations are based largely on secondary, written sources (available evaluation, monitoring and progress reports) plus some interviews with external and internal respondents (including Executive Directors and Lead Regional Managers). Accessing documents proved difficult, time-consuming (and therefore, for Oxfam, expensive). Field-based case studies were conducted in Mali and Senegal (Cotton Dumping), Indonesia (Labour Rights) and Mozambique (Education).

⁴ Terms of Reference – see Annex 3

The main sources for the sector evaluations were existing evaluations, monitoring and progress reports, supplemented by interviews with some Executive Directors, Lead Regional Managers and key affiliate and OI staff. Further depth was added by field-based case studies:

- Labour rights campaigning in Indonesia
- Coffee campaigning in Honduras and Nicaragua
- Cotton dumping in Senegal and Mali
- Educational access for girls in Mozambique.

The evaluation of the Humanitarian Consortium and TFMT involved interviews with HCMG members and EDs (of HC member and non-member affiliates); attendance at the TFMT meeting in Colombo in October 2005 and interviews with Country Team members.

9.2 Critical reflections on the Evaluation

The Evaluation studied programmes and campaigns implemented by affiliates (individuals and groups) and by OI as a whole. The Evaluation Team recognize that OI is “a work in progress” and that systems for accountability and learning at confederation level are still being developed. One important area which we have not been able to address is Oxfam’s *cost-effectiveness*. During the early stages of the Evaluation we attempted to collect information about affiliates’ investments in the four sectors over the five year period.

We looked at the figures supplied by affiliates for the annual “financial mapping” exercise compiled by the Oxfam International Secretariat as well as some affiliates’ own figures on activities such as campaigning⁵. Some expenditure figures are included in the internal evaluation reports on Education and Gender (see Volume II) but we were unable to obtain sufficient information to enable us to draw useful conclusions about Oxfam’s overall cost-effectiveness or efficiency.

Generally speaking the process worked reasonably well but there were weaknesses:

- The combination of “context-in” and “programme-out” perspectives needed to be articulated in greater detail.
- The recruitment of the internal and external evaluators took longer than planned, which meant that the time available for external evaluators to critically review the internal evaluation reports and compare them with the contextual reviews was very short.
- If resources (and timing) had permitted, it would have been very useful to have brought the internal and external evaluators teams together at the start of the process for a general briefing and discussion of methodology and working methods and for a post-Evaluation meeting.
- Because there is no single, comprehensive data-base, we are cannot be sure that our conclusions are based on all the information that exists.
- There was no research among actual or intended beneficiaries. We relied largely on existing evaluation reports, many of which suffered from the same weakness.

All the sector evaluations make critical observations regarding monitoring and evaluation. The following observations from the Trade sector are representative:

⁵ We appreciate the information received the few affiliates who responded: however the data was insufficiently complete to be useful.

The MTF Campaign set up a monitoring and reporting system and is better documented than the other sectors covered by this Evaluation, but that is a poor benchmark. There are three main weaknesses:

- Rigorous external evaluations of the campaigns are rare and much of the available documentation is reporting on media coverage and publicity;
- There has been little systematic, Oxfam-wide effort to link MTF monitoring and evaluation work with the monitoring of field-level livelihoods programming. It may be too early to expect significant or large-scale impacts on people's lives, but the system for capturing such changes should be in place from the start, so as to establish baselines.
- In MTF as in other joint affiliate work, there is no systematic recording or reporting of direct and indirect costs. Until affiliates agree on and apply common programme and financial categories and definitions Oxfam will not be able to judge the cost-effectiveness of its work.

9.3 Cost-benefit of the Evaluation

The Evaluation has taken nearly one year and the budgeted cost was approximately US\$ 400,000. This is an enormous investment of time and money. It is for Oxfam, as client, to decide whether the benefits justify the costs. In this context, two comments are appropriate:

- First, during the course of the first four years of the current strategic plan, the combined expenditure of the Oxfams will amount to some US\$ 2 billion. The estimated cost of this evaluation represents approximately only 0.02% of the total combined expenditure: a very low level of investment in monitoring, evaluation and learning.
- Second, if affiliates and OI as a whole invested in a continuing and well-organised monitoring and evaluation system, "mega evaluations" such as this, which are disruptive and which (because of their infrequency) arouse defensive reactions, would not be necessary.

9.4 Conclusions and recommendations

On the basis of the experience of the Evaluation Team and the observations of the external evaluators, our conclusions and recommendations are as follows:

- In setting Learning and Accountability as an objective without investing adequately in Monitoring and Evaluation, Oxfam has put the cart before the horse, leaving Learning and Accountability as a slogan;
- Oxfam should **study and agree on those areas of M&E work which can best be carried out collectively**, and those which need to be done at affiliate level;
- One option would be to **pilot collaboration on M&E in one high priority area** of work during the next strategic plan period. (This suggestion is also made in Chapters 3, Education and 5, Gender Equality).
- Having defined the scope of collective M&E work Oxfam should **establish the necessary architecture, toolkit and resources** to carry it out as a service to the confederation as a whole. Information systems – storage, classification, retrieval and dissemination – need to be brought up to the standards required to support the agreed M&E objectives;
- **M&E needs to become – and to be seen as – an integral, normal and continuing part of management** (like financial accounting), not as an occasional, optional add-on.

- M&E is an important contributor to Learning and Accountability but it is not the only one. Linkages should also be established with **policy-development, programme planning staff training and development.**
- Oxfam’s M&E work seems to have swung far enough in the “qualitative” direction. This should now be balanced by **greater attention to quantitative data.** Narrative information should be more closely aligned with financial data. Without this Oxfam cannot judge the cost-effectiveness of its campaigning or field-level service delivery programmes. This weakness undermines accountability, learning and campaigning.