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Changing Advocacy Practices in a Changing World: an Evaluation of Oxfam America's Influencing Work in a Shifting International NGO Culture

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Changing advocacy practices in a changing world: an evaluation of Oxfam
America's influencing work in a shifting international NGO culture

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PIM 74

A capstone paper submitted in partial fulfillment of the requirements for a Master of Arts in
Sustainable Development at SIT Graduate Institute in Brattleboro, Vermont, USA.

May 18, 2016

Jeff Unsicker, Ph.D., Advisor

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Date: May 18, 2016

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TABLE OF CONTENTS

Abbreviations	v
Abstract.....	1
Introduction.....	2
Context.....	5
A snapshot of the world in 2016	7
Sustainable Development Goals.....	9
Key development stakeholders	11
New trends in international NGO advocacy.....	12
Oxfam 2020	18
Framing the contribution	21
Influencing MEL.....	22
Methodology	26
Introduction to the Meta Review.....	28
“2015 P&C MEL Meta Review for Oxfam America”.....	33
Introduction.....	33
Purpose	34
The Oxfam context.....	35
Key common lessons and trends.....	36
Looking forward	46
Evaluation and analysis of Meta Review through core advocacy frameworks.....	49
Oxfam contextual analysis.....	52
Applying the Meta Review through a 2020 lens.....	52
Current examples of Southern leadership.....	53
The role of Northern affiliates for transnational influencing.....	53
On implementation: thinking about 2020’s impact on influencing.....	56
Critical observations in closing	59
Bibliography.....	63

Abbreviations

General

INGO: International Non-Government Organization

MDGs: Millennium Development Goals

MEL: Monitoring, Evaluation and Learning

NGO: Non-Government Organization

SDGs: Sustainable Development Goals

UN: United Nations

Oxfam terms

AAR: After-Action Review

BtB: Behind the Brands Campaign

FfD: Financing for Development Conference

OA: Oxfam America

OI: Oxfam International

OUS: Oxfam US (alternative name for Oxfam America)

P&C: Policy & Campaigns division

WIN: Worldwide Influencing Network

ABSTRACT

From hunger and forced displacement to climate change and global economic inequality, society today must contend with the compounding impacts of manmade crises threatening and reshaping our planet and livelihoods in real time. As states and transnational actors approach a new era of development, the role of civil society remains critical to push decision makers and governing bodies to be accountable, inclusive, just, progressive and rights focused.

Toward this end, a growing number of civil society organizations are acknowledging that states, citizens and civil society in the Global South must lead their own development path. This is catalyzing a significant shift among Northern based INGOs to become more geographically balanced. Oxfam is a global development and influencing network of organizations with a collective agenda to end poverty, inequality and injustice by speaking truth to power and empowering active citizens and effective states. The new One Oxfam model seeks to decenter the confederation's leadership from the Global North to the Global South, consequently shifting the role of Northern affiliates.

The core of this capstone paper is a Meta Review of the evaluations for six of Oxfam's policy advocacy and campaigning initiatives in 2015. The review frames nine key and common lessons and best practices. Through this capstone, the lessons are placed within the evolving global, development and new One Oxfam contexts, as well as emerging literature and core advocacy frameworks. The aim is to take stock of how Oxfam's culture of learning can help inform a new approach to influencing within this new organizational model. Ultimately, the paper highlights the strengths and potential in Oxfam's current ways of working and theories of change, while underpinning the need to address the organization's historically Northern roots in order to become even more inclusive, upstream, impact-focused and strategic, and infuse even greater intentionality into doing that which is most effective and sustainable.

Introduction

International NGOs are shifting the way they operate to reflect a new sense of what it means to affect transformational change. Historically, INGOs have taken a needs-based approach to development – providing services, aid and direct benefits to poor countries, communities and individuals – in order to fill gaps in government services to address human poverty. In the last decade, INGOs have embraced the rights-based approach, which focuses on the relationship between states and dominant actors as duty bearers and individuals as rights holders, and increasingly positioned themselves as political enablers and advocates. By framing poverty as an issue of rights versus needs, INGOs help promote conditions that prioritize equality, political participation and empowerment, and accountability toward more sustainably eliminating poverty.¹ Today, the sector is shifting again to prioritize the role of states, citizens and civil society in the Global South as the leaders of their own development. This Southern shift also includes a greater emphasis on advocacy and influencing at the local, national and transnational levels to contribute to systematic changes in power relationships in various contexts.

Oxfam recognizes the essential interplay between state-led sustainable development, citizen empowerment and an enabling policy and political operating environment. Oxfam is a global confederation of 17 development and advocacy organizations with a collective

¹ Foresti, M. and Ludi, E. (2007). *Human rights and livelihood approaches for poverty reduction*. Published through poverty-wellbeing.net, operated by Intercooperation and Overseas Development Institute.

mission to eradicate poverty, inequality and injustice. These affiliates work with diverse stakeholders at multiple levels to empower and engage active citizens as change agents, help foster effective states and accountable duty bearers, and speak truth to power in the name of human rights for the world’s marginalized populations.² In keeping with emerging trends across the INGO sector, Oxfam’s new “One Oxfam” model – or Oxfam 2020 – aims to see the organization become more strategically aligned across the confederation, take greater direction and leadership from Southern affiliates and country teams, and embed influencing across its global work. The influencing capacity and function of Oxfam America has been highlighted as a key strength and asset to support national and global efforts across the confederation.

For my practicum, I worked at Oxfam America in Washington, D.C., as a Graduate Fellow with the Monitoring, Evaluation and Learning (MEL) team for the Policy and Campaigns (P&C) division. Bolstered by my background in nonprofit organizations, I applied my graduate training in policy advocacy and analysis, social change and human rights to meaningfully develop and contribute to concept notes, case studies, evaluations, reports, influence monitoring tools, knowledge exchange projects, Theories of Change and strategic plans. I worked on diverse projects with a wide array of global and DC-based teams whose policy influencing focuses range from extractive industries, to the private sector, climate change, humanitarian response, rural agriculture and gender justice. I

² Oxfam International (2014). *National Influencing Guidelines*. Internal document.

came to understand Oxfam's organizational Theory of Change, value orientation and vision for the world through conversations with my supervisor and colleagues, staff meetings, internal literature and by being thrown into the work. I was also encouraged to apply to my own perspective and expertise when writing reports and advising teams, in order to gently challenge and push the Oxfam orthodoxy.

As a Policy Advocacy Course-Linked Capstone, this paper focuses on a written contribution I developed during my practicum to support Oxfam's advocacy work. The contribution is a high-level, analytic Meta Review of lessons and best practices from Oxfam's influencing work based on evaluations of advocacy initiatives in 2015. The capstone serves to contextualize, frame and expand the Meta Review as a useful point of reflection as Oxfam begins its shift into a new global structure. The capstone offers a sort of time capsule – documenting changes happening in real time within the organization and placing them within the greater global context of emerging changes in the field of development, advocacy and citizen engagement.

The first sections of the paper provide context at the global, international development, and Oxfam levels and describe the methods and sources used to produce the Meta Review. Following the Meta Review, the last sections reflect on and make connections between the larger context, the report and relevant literature on advocacy. The closing section frames strategic considerations for the future and takes stock of how Oxfam's culture of learning can help drive effective influencing in the new model.

In the summer of 2016, the MEL team intends to present the Meta Review and reflections from this capstone to the staff and leadership of Oxfam America, at the invitation of the P&C division Vice President. This high-level discussion can provide an opportunity to consider the strategic value of Oxfam’s influencing MEL work and reflect on the cross-cutting ideas at a division-wide level. Both the Meta Review and this capstone seek to anticipate and help contribute to planning discussions for the upcoming changes and implementation of Oxfam 2020.

Context

The various opportunities and challenges of a shifting social, environmental and political landscape drive the need for international NGOs to adapt their ways of working. The new post-2015 UN Sustainable Development Goals (SDGs) have framed the agenda for the next fifteen years of development, government cooperation and, by extension, civil society advocacy. International NGOs have an important role to play in promoting inclusive, effective pathways for achieving these development targets. Toward this end, a growing number of organizations recognize the essential and central role that citizens and country governments in the Global South have for envisioning, creating and resourcing their own development path. In addition, influencing has become an increasingly pervasive tool for eliminating poverty and promoting human rights.

According to Oxfam, influencing involves “systematic efforts to change power relationships, attitudes and beliefs, and the formulation and implementation of... policies

and practices, in ways that promote more just societies without poverty.”³ This framing relates closely to Unsicker’s (2012) comprehensive definition of policy advocacy:

*Policy advocacy is the process by which people, NGOs, other civil society organizations, networks and coalitions seek to enhance social and economic justice, environmental sustainability and peace by influencing policies, policy implementation and policy-making processes of governments, corporations and other powerful institutions.*⁴

Influencing and policy advocacy both serve as means to a similar end, and Oxfam distinguishes them as taking place on broad and targeted levels, respectively. Taken together, these definitions frame the process of shaping a positive operating environment in which decision makers, civil society and other actors engage with one another and of targeting powerful actors within formal decision making structures that govern society. These processes require recognizing the structural and psychological dynamics of power, interests and decision making, toward shifting those structures to bring about systemic and transformational change.

For Oxfam, prioritizing influencing and the role of Southern actors – including partners, country and local governments and “grass-tops” leaders⁵ and organizations – has manifested in a confederation-wide reorganization. The multi-year process to become more “globally balanced and Southern driven”⁶ has, among other changes, repurposed

³ Oxfam International (2014). *National Influencing Guidelines*. Internal document, p. 9.

⁴ Unsicker, J. (2012). *Confronting Power: The Practice of Policy Advocacy*. Sterling, VA: Kumarian Press.

⁵ Explanation: When working with in-country civil society or representative stakeholders, Oxfam distinguishes between grassroots leaders and organizations – hands-on, local civil society actors directly engaged in community-level work – and “grass-tops” leaders or organizations who do high-level national or regional organizing, service provision and/or advocacy.

⁶ Byanyima, W. (2013). *Oxfam 2020: a case for change*. Internal document.

individual Oxfam affiliates to best serve a more collectively oriented One Oxfam. Within the One Oxfam model, US based efforts will focus on their unique access, power and position to influence US foreign policy, global financial institutions, domestic private sector actors, and multinational corporations, as well as on fundraising and technical expertise, in service of the local and state-level development leadership and influencing.

To understand what this shift seeks to accomplish and why, it is useful to place Oxfam's influencing work, and what's happening in international advocacy generally, within its broader context – namely, changes taking place in the global operating space, in international development, and within Oxfam itself.

A snapshot of the world in 2016

Development actors must contend with the compounding impacts of manmade crises that are threatening and reshaping our planet and livelihoods in real time. Climate change is already having devastating ecological and human impacts, from ocean warming to drought and starvation. A massive surge in the forced displacement of peoples across and between continents is currently challenging democratic states and regions to open their borders and support hundreds of thousands of refugees fleeing oppression and political disenfranchisement. The enormity of waste byproducts from our globalized consumer culture has led to floating trash islands, sludge lakes, and urban centers and waterways overrun by contaminated refuse. The enduring incidence of gender- and identity-based violence, civil and cultural wars, government corruption and violations of human rights traumatize and destabilize families, communities, and whole countries.

Although the number of people living in extreme poverty has halved since the 1990s despite a period of rapid population growth, poverty and inequality are experienced differently in different contexts and remain the reality for over a billion people.⁷ Global economic inequality has reached wild heights, where the vast majority of world's power and wealth is held by powerhouse multinational corporations, international financial institutions, and a select class of super-elites.⁸ Rampant and unsustainable levels of deforestation, mineral mining, and fossil fuel extraction are causing irreversible damage to landscapes and essential natural resources, while also destroying the homes and traditional ways of local and indigenous communities.

These issues demand immediate action by political leaders to protect people, the planet and resources. Further preventative action is also required to address the largely unforeseeable political, social, and environmental ripple effects of these changes. As policy decisions, treaties, funding priorities and government coalitions take shape, many progressive civil society organizations are working to insert a pro-poor lens to humanitarian and development planning. The geographic, political, economic and health conditions faced by the world's poor exacerbate the impacts of these crises, which have largely been created by wealthy nations. The realities of poverty and inequality mean that those who stand to suffer most are those who have the fewest rights, resources, or recourse

⁷ The World Bank (2013). *Remarkable declines in global poverty, but major challenges remain*. Retrieved from <http://www.worldbank.org/en/news/press-release/2013/04/17/remarkable-declines-in-global-poverty-but-major-challenges-remain>

⁸ Fuentes-Nieva, R. and Galasso, N. (2014). *Working for the few: political capture and economic inequality*. Oxford, UK: Oxfam GB for Oxfam International.

to respond or recover. The fairest steps forward will help empower all states and citizens – especially marginalized and poor people – with real opportunities to be safe, secure and self-determined.

Sustainable Development Goals

Announced in the fall of 2015, the SDGs represent the latest global commitment to strategies and priorities for ending inequality, injustice and poverty worldwide. Building upon the successes and failures of the eight Millennium Development Goals (MDGs), seventeen areas of concern will now become the foundation for multilateral, multi-level development agendas. This new anti-poverty framework takes on a more holistic understanding of what affects and hinders development than the MDGs, which focused on hunger, healthcare, education, gender empowerment and epidemic diseases. Intending to embrace the principles of sustainability, the SDGs further integrate environmental issues such as climate change, clean energy, consumption and production, and resource rights, as well as broader social and economic issues of labor, the global economy, technology access, peace and inequality in its totality.⁹

While arguably more expansive, these goals overall are still problematic. A scientific review by the International Council for Science and the International Social Science

⁹ United Nations Development Programme (2016). Retrieved from <http://www.undp.org/content/undp/en/home/sdgooverview/post-2015-development-agenda.html>

Council considered whether and how well the 17 goals and 169 targets adequately address the integrated dimensions of sustainability.¹⁰ The study acknowledges that the SDGs are an improvement from the MDGs, offering a more comprehensive and holistic framework for sustainability. However, the authors take issue with the lack of clear outcomes or a narrative for how the SDGs will be a means to an end. They also critique the uniformity with which the SDGs characterizes the identities and realities of different social groups, and ultimately found only 29 percent of the indicators to be well developed.¹¹

In addition to quantitative gaps such as weak measurable indicators, there are significant qualitative gaps that undermine the transformative potential of global goals. For example, the SDGs have no meaningful or explicit structural targets around corporate power or international finance. Furthermore, they fail to name critical intersectional development issues such as indigenous rights, social inequality and barriers to political participation. Regardless, the framework of the SDGs offers civil society a map for how to best navigate the international development agenda, plan partnerships, build alternative agendas, direct resources and be targeted, effective influencers.

¹⁰ ICSU, ISSC (2015). *Review of targets for the Sustainable Development Goals: the science perspective*. Paris: International Council for Science (ICSU).

¹¹ ICSU, ISSC (2015). *Review of targets for the Sustainable Development Goals: the science perspective*. Paris: International Council for Science (ICSU).

Key stakeholders in development

In addition to states and transnational governance authorities, the international donor community continues to occupy an important role in global development. Large foundations and funders have the political and economic power to influence governments and standard setting agencies, set their own development agendas, innovate and implement development projects, and drive thought leadership and new research. Consequently, their priorities, voices and alliances matter and make them another key influencing target and potential partner for civil society.

As donors, innovators, land and resource users and employers, the private sector has also become a significant actor in global politics and development. Corporate economic and political influence and will drives development decisions and opportunities at local, national and transnational levels. In general, this does not bode well for the average citizen living in fragile states or with limited political voice or ability to organize. In under-regulated states and industries, transnational corporations carry out gross violations against people's human rights and the environment. Free trade agreements are fast-tracked to promote trade and economic development between and among states without a political infrastructure at the transnational level to provide satisfactory, unbiased regulation and oversight. In turn, companies can easily capture these inadequate systems and hide their abuses and carry on business as usual. For this reason, and more, INGOs such as Oxfam recognize the need to both expose and influence corporate policies and practices and push the international community to take greater responsibility for managing a globalized

economy and workforce. The rapid expansion of Oxfam's Private Sector Department speaks toward this trend and increasingly relevant role of companies in international human rights and development.

Another new and critical "player" in development is technology. The advancement and growing accessibility of new technologies offer a game changing opportunity for efficient, ground-up approaches and tools for people-powered development and partnerships. As well, the Internet represents a platform for open, global civil space with vast potential for new voices of authority and participation, although it is largely unregulated and constantly evolving. Advanced technologies promote and link environmental tech solutions, entrepreneurship, social movement building, and the visibility of marginalized groups and issues. The potential of this technological space pushes the nonprofit sector to resource, empower, and amplify the role and capacities of globalized citizens.

New trends in international NGO advocacy

Amidst this rapid change, the role of civil society remains critical to push governing bodies and political systems to be accountable, inclusive, just, progressive and rights focused. INGOs such as Oxfam have historically played the role of watchdog, service provider, development implementer and advocate. Through this work, they strive to link the needs, interests and capacities of rights' bearers to the mindsets and decisions of duty bearers at the top. For all of its value, civil society's work is not without bias or conflicts. International civil society, largely centered in and driven by the Global North, has both fought against and fallen prey to the classic and evolving neoliberal development game

crafted by Northern states and hegemonic transnational authorities. The modern iteration of this tension has inspired a significant shift among INGOs to become more geographically balanced.

The changing nature of development and advocacy reflects the idea that as more countries in the Global South reach middle-income status, the focus of development must help to build capacity on the ground. As well, there is increasing recognition – by NGOs, multilateral institutions, and donor states – that local and country ownership is essential to sustainable development. The notions of active citizens and effective states embody the conceptual framework behind this southern shift in the nonprofit sector, as promoted by author and Oxfam researcher Duncan Green.¹² In this frame, Northern actors have a particular role to play to support this country-level work, through influencing governing bodies and decision makers at various levels in enabling spaces. While values such as local leadership, empowerment, and self-determination are nothing new, the practical implementation of this mentality at the scale of international development is happening now, in real time. New research on these changes in advocacy from the field helps to capture the way the sector is changing and toward what ends.

¹² Green, D. (2012). *From poverty to power: how active citizens and effective states can change the world* (2nd ed). Warwickshire, UK: Practical Action Publishing Ltd in association with Oxfam GB for Oxfam International.

A recent study financed by Plan UK considers the way the world's leading advocacy and development organizations, including Oxfam, are changing to focus on advocacy and campaigning in the Global South.¹³ The study explains how "INGOs are tailoring their approaches across a spectrum from 'top down,' determined by broad global themes, to 'country up,' focusing on local policy implementation."¹⁴ This shift is informed by a core belief in the power of citizen engagement referred to as the participatory advocacy model, particularly in politically and economically fragile states. Ultimately, by building up and demonstrating the capacity and independence of organizations' Southern offices and partners, there stands to be positive ripple effects on the capacity and leadership potential of Southern countries and citizens, as well as on the attitudes and actions of government actors. The study also cites the challenges that emerge from making wide-sweeping organizational change such as variances in skill levels and capacity of country offices, and ways to mitigate negative impacts such as phasing in these changes.

The report synthesizes the common ways that some of the most well-known INGOs are currently restructuring to be more effective in and adapt their advocacy approaches to a shifting global context. Overall, the most salient changes are characterized by the incorporation of influencing widely as a mechanism for development, and the Southern

¹³ Walker, M. and Christie, K. (2015). *Where change happens: how international NGOs are shifting the focus of their advocacy & campaigning toward the Global South*. London, UK: The Eden Stanley Group, Ltd.

¹⁴ Walker, M. and Christie, K. (2015). *Where change happens: how international NGOs are shifting the focus of their advocacy & campaigning toward the Global South*. London, UK: The Eden Stanley Group, Ltd. p. 5.

shift in organizational leadership, power, and level of focus. Rather than leading and overseeing programs, traditional headquarters located in the North will transform to become centers for global influencing, technical support, and coordination. Some key trends include:

- *Having a “flexible framework” that allows for greater in-country leadership.* By framing issues thematically and “irrespective of geography,” organizations may run programs in-country with varying degrees of involvement from Northern partners. The study cites Oxfam’s own shifting vision of “empowered and accountable countries, with headquarters becoming enablers, consolidators and centers of expertise.”¹⁵
- *Focusing on influencing across the organization.* Rather than treating influencing as a sideline condition for or byproduct of development work, NGOs see influencing as a key driver and tool for development at multiple levels. Influencing has empowering properties for local actors, and offers a role for Northern and international advocates to support and build upon country-driven initiatives in broader spaces. Many INGOs, including Oxfam, are transforming their affiliate model to rebrand themselves as “influencing networks.”
- *Sharing best practices and knowledge* within an organization and across countries, where it relates to advocacy and influencing. The study cites Oxfam’s new internal

¹⁵ Walker, M. and Christie, K. (2015). *Where change happens: how international NGOs are shifting the focus of their advocacy & campaigning toward the Global South*. London, UK: The Eden Stanley Group, Ltd. p. 18.

communication platform, the Knowledge Hub, geared toward supporting national affiliates' organizing and advocacy work across themes with cross-country technical expertise.

- *Investing in locally-driven advocacy and active citizen capacity building*, with an emphasis on collective action, increased political participation, representation in decision-making spaces, and youth voice empowerment.
- *Taking an evidence-based approach* informed by beneficiary input, demonstrated impact, and facts linked to the desired policy change. The study also emphasizes the trend toward real-time qualitative evaluation and learning, citing Oxfam's methodology that honors the "messiness of building social contracts between citizens and states."¹⁶
- *Bundling similar work across countries* with similar conditions in order to attract funding and increase efficiency. This relates to the importance of building and working in broad, thematic coalitions to increase impact.

In a critical discussion paper about effective advocacy, authors Schlangen and Coe (2014) consider a vast collection of advocacy evaluation studies to reflect on the perceived relationship between influencing and social change.¹⁷ According to these authors,

¹⁶ Walker, M. and Christie, K. (2015). *Where change happens: how international NGOs are shifting the focus of their advocacy & campaigning toward the Global South*. London, UK: The Eden Stanley Group, Ltd. p. 26.

¹⁷ Schlangen, R. and Coe, J. (2014) *The value iceberg: weighing the benefits of advocacy and campaigning*. Discussion Paper 1. BetterEvaluation.

campaigning and advocacy at any level represent an indirect approach to structural change, versus the direct, service-based interventions that NGOs typically carry out. Value for money, or social return on investment, is critical for NGOs who receive public and donor funding, and represents a key criterion for assessing the effectiveness of influencing. The authors suggest that the qualitative nature of social value is such that understanding it relies heavily on speculation and assumptions; as well, they note the “tendency for organizations concerned with measuring social value to focus on areas that can be more easily measured, and to eschew assessment of more difficult and problematic interventions.”¹⁸ Just as social value is difficult to measure, it is complicated to assess the extent to which advocacy efforts to influence policies, practices, and enabling environments do enough to promote social value, or whether change can be attributed to an individual organization’s efforts.

Based on their expertise in campaigning and evaluation, Schlangen and Coe (2014) offer a handful of compelling suggestions for how to promote advocacy and campaign effectiveness:

- Develop a robust strategic worldview;
- Recognize campaigning as inherently speculative, and always a gamble;
- Learn from experience to inform an awareness of what enabling conditions for effective campaigning look like;

¹⁸ Schlangen, R. and Coe, J. (2014) *The value iceberg: weighing the benefits of advocacy and campaigning*. Discussion Paper 1. BetterEvaluation. p. 3.

- Have a strong evidence base and, when possible, build it as plainly as possible with simple observations and meaningful comparisons;
- Communicate simply and meaningfully by getting to the basics;
- Institutionalize a culture of learning to promote accountability at multiple directions, from constituents and partners to funders, and innovation, reflection and growth; and,
- Seek wide and diverse input on developing advocacy strategies, intelligently and wherever possible, to decrease bias and increase likelihood of strong outcomes.¹⁹

Oxfam 2020

Following in the footsteps of its INGO counterparts such as Plan, CARE and ActionAid, Oxfam is shifting to prioritize the role of its Southern partners and allies and of influencing for achieving global poverty eradication, social justice and sustainable development. In 2013, the Executive Directors of the greater Oxfam confederation took decisive action to reorient the organization's center of power from international head offices in the Global North to country program offices in the Global South. This collective movement intended to streamline the efforts and missions of the affiliated Oxfam offices into a One Oxfam model, as outlined in the Oxfam 2020 plan, with an emphasis on Southern leadership.

¹⁹ Schlagen, R. and Coe, J. (2014) *The value iceberg: weighing the benefits of advocacy and campaigning*. Discussion Paper 1. BetterEvaluation.

Today, the organization is in the midst of implementing this vision through a structural reorganization across the confederation. Oxfam is in the process of thematically reconfiguring its work and organizational structure based on three global strategic areas: inclusive and resilient food systems, humanitarian advocacy, and accountable development finance. The shift reflects a practical and evidence-based belief that “achieving impact on the ground depends on national level change,”²⁰ as well as a core organizational value that believes in the power and voice of rights’ bearers as active citizens.

The 2013-2019 global strategic plan envisions Oxfam as a Worldwide Influencing Network (WIN). Through WIN, Oxfam seeks to reestablish itself publicly and operationally as a more globally balanced, holistic influencing network.²¹ The WIN concept aims having the following impact:

*By 2020, Oxfam will have contributed to achieve more profound and lasting change in the lives of people living with poverty and injustice. We will have done this at a far greater scale by creating a world-wide influencing network (WIN) of One Program teams, united by a common vision for change, adequately resourced, able to use the full range of influencing techniques at their disposal, and actively participating in a wider movement to fight against the injustice of poverty.*²²

Oxfam’s point of view holds that ending poverty, injustice and inequality and creating sustainable, meaningful changes in people’s lives requires empowering active citizens to

²⁰ Oxfam International (2014). *National Influencing Guidelines*. Internal document, p. 12.

²¹ Oxfam International (2014). *National Influencing Guidelines*. Internal document.

²² Oxfam International (2014). *National Influencing Guidelines*. Internal document. p. 6.

be agents of change, and seeing those very rights' bearers take ownership and leadership in national spaces where they can and should have the greatest influence and voice.

Inherent to this appreciation of citizen power, there is the concurrent belief that building up effective states is necessary to ensure that a country's social, political and governance structure delivers essential services and protections to citizens and equitably upholds their rights and promotes well-being. Through strong, citizen-owned influencing outcomes in national contexts, Oxfam envisions leveraging success stories at local and national levels to help shape and support global campaigns.

As per the broader trends in INGO advocacy, Oxfam 2020 intends to see Northern affiliates contribute to the One Oxfam model through focused channels for maximum impact. Oxfam America has a unique and important role within the confederation given the essential place and power of the US around the world. From foreign policy and aid to the financial, energy, and commercial sectors, US-based influencing is globally significant across economic, social, environmental and political planes. As such, Oxfam America is poised to contribute to the new confederation model by:

1. Ensuring program excellence across the three strategic themes driving Oxfam's work,
2. Delivering the power of the US through influencing targeted at foreign policy, financial institutions, and multinational corporations, and

3. Mobilizing US funding for the Confederation²³

As a development and influencing organization, Oxfam prioritizes the essential interplay between sustainable, on-the-ground programs and an enabling policy and political operating environment. Ensuring lasting development outcomes and meaningful impact in people's lives requires social and political conditions at broad and local levels that help entrench change. Looking forward, Oxfam will be strategically embedding influencing across its global work and US offices will work to fulfill their particular role in the One Oxfam vision for creating change and having sustainable impact to eradicate poverty, inequality and injustice.

Framing the contribution

Understanding how change happens – when it goes well, when it goes less well, its inputs, drivers, barriers, and trigger points – helps to inform and refine future advocacy and program planning decisions. In this vein, Oxfam values the importance of capturing, assessing, and learning from the way that change happens, and as such engages in MEL to assess its global campaigns and influencing work. While traditional, field-based M&E is an inherent part of international development work, comprehensive “influencing MEL” as a wide-sweeping organizational practice is less common. Oxfam is arguably a leader for

²³ Offenheiser, R. (2015). *FY17 Priorities Memo: Message to Staff*, Oxfam America. Internal document.

advancing and applying qualitative evaluation and learning principles to its influencing work in order to promote holistic and effective change.

Influencing MEL

In general, the function of the Policy and Campaigns MEL unit is to provide crosscutting MEL support and expertise to teams across the division and in-country offices, as well as to oversee external contractors. The MEL team seeks to improve policy advocacy and campaign effectiveness and the impact of outcomes and to ensure accountability to stakeholders, while appreciating the nonlinear, multidimensional, and context-specific nature

of change. MEL evaluations developed by external contractors are largely aimed at demonstrating outcomes and effectiveness to donors and internal leadership, in addition to providing an objective analysis of the quality of Oxfam’s work.

Internally-led evaluations tend to provide more personalized and context-aware reflections than external evaluations. MEL is also an embedded feature of every P&C team, which will conduct ad hoc debriefs as needed and undertake formal quarterly reviews of their work to demonstrate influencing progress and lessons learned to Oxfam’s leadership.

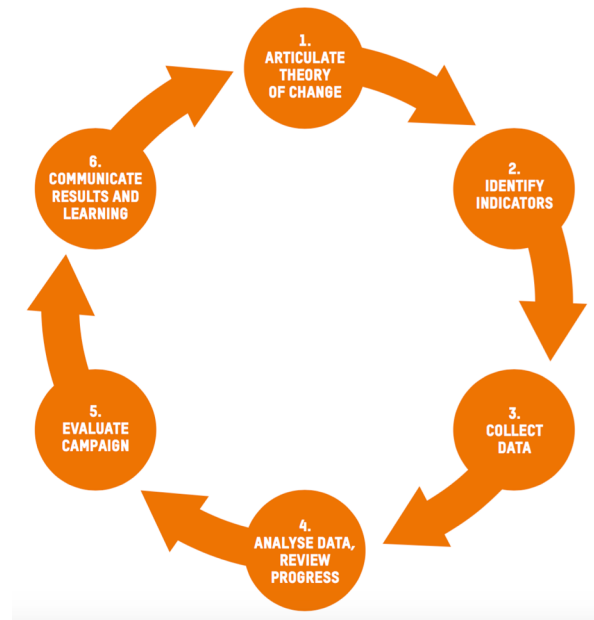


Figure 1: Oxfam's Influencing MEL Analysis Framework

The figure below demonstrates the MEL cycle, as a tool for teams' use and for general guidance as to how MEL works in P&C.²⁴

MEL evaluations span the advocacy and campaign efforts of various policy, campaigns and crosscutting international teams. As issue-based or functional departments, teams may be engaged in various levels or types of influencing, from short-term advocacy at a global convening, to long-term campaign or program influencing, to a campaign “spike” – a supercharged advocacy moment in a campaign that seeks to capitalize on a relevant political moment or is manufactured to spur public and political engagement around an Oxfam issue or theme.

The MEL unit uses a suite of tools and formats for conducting internal advocacy evaluations. The most common are After-Action Reviews (AAR), in-depth assessments which take place at the close of a campaign spike or initiative, and WIN case studies, shorter summaries of the activities, outcomes, and lessons from a campaign or spike. Both use desk research and interviews to capture and evaluate the context, activities, outcomes, and lessons from an advocacy initiative in order to inform a team debrief and wider organizational learning. Although Oxfam has numerous advocacy efforts and campaigns taking place all at once, these reports generally take between 2-6 months to complete and therefore, given limited staff capacity, may only be conducted for a portion of Oxfam's work. Choosing which advocacy campaigns, influencing moments, or campaign spikes

²⁴ Oxfam Community of Practice for MEL in Campaigns (2015). *Monitoring, Evaluation, and Learning in Oxfam Campaigns & Advocacy*. Internal document, updated from 2009 and 2012 versions. p. 1.

will be reviewed is driven by the interests of a given team, the MEL unit and P&C leadership.

In order to develop an AAR, a WIN case study, or any other evaluation, MEL staff will more or less take the following methodological steps:

- Develop a Terms of Reference to establish expectations, roles, and a timeline for project;
- Compile and analyze all related literature, documentation, data, and research;
- Design, conduct, and transcribe in-person and phone interviews with key internal and external stakeholders and partners;
- Triangulate key information and corroborate findings with main point of contact on team;
- Extract and develop lessons and recommendations based on triangulated material;
- Draft and submit report to key staff for review and comments; and
- Develop final draft with attention to comments for sign-off.

My position focused on promoting and evaluating effectiveness within Oxfam's influencing work, toward encouraging a culture of learning as well as the utility of learning. "Effectiveness" intends to qualitatively encapsulate the purpose and various aims of Oxfam's influencing work. Intangible ideas such as effectiveness, success, and impact are inherently contested terms, as they cannot be truly validated or vetted. An internal MEL guidance note suggests that advocacy and analysis methods should be "simple enough to be used, useful enough to help, and deep enough to generate meaningful

learning.”²⁵ As such, “influencing MEL” strives to understand, articulate, and emphasize concepts such as:

- the extent to which policy advocacy and influencing efforts may have a meaningful impact in the lives of vulnerable people;
- the best practices for ways of working within a team;
- the value-add and efficiency of staff time and resource application;
- the social return on investment of different influencing activities;
- the extent to which Oxfam contributes to influencing outcomes, in the context of the operating environment and other intervening factors;
- the Theory of Change and assumptions that link policy advocacy and campaign choices to an overarching strategy for change, informed by the on-the-ground realities and experiences; and
- the relationship between strategic planning, policy and power analysis, and reflective learning.

Toward the end of my practicum, my supervisor encouraged me to undertake a project that would capture key and common lessons from the entirety of our influencing MEL review work from 2015. The vision of this project sought to promote the utility of these reports, which are historically given varying degrees of weight from team to team, in an overarching way. By synthesizing and comparing lessons gleaned from across the division,

²⁵ Stalker, C. (2015). *Policy and Campaigns: Monitoring, Evaluation and Learning (MEL)*. PowerPoint produced for Oxfam America, February 2015. p. 3.

the “Meta Review” would invite stronger cross-team learning and elevate the outcomes and lessons from individual, campaign-specific reports to have division-wide relevance for higher level reflection and planning conversations within OA and, where relevant, the broader Oxfam context. The context of Oxfam 2020 and the unfolding reorganization of OA presented a timely and relevant opportunity to invoke the greater value of influencing MEL.

Methodology

In order to develop the Meta Review, I considered six MEL reports that were developed for P&C during the 2015 calendar year. My supervisor directed me to establish my own criteria and methodology to do a high-level review of the reports, meaning a review that stayed focused and only delved as deep as top-line concepts and major themes. Of the six reports included in the Meta Review, I had personally written or contributed to four of the reports, while the remaining two were written by my MEL colleagues. This meant I had the benefit of being familiar with the campaigns, content and lessons from the majority of the reports.

I used inductive reasoning to observe, extract and analyze the lessons that appeared to be significant and cross-cutting from these reports in order to make overarching observations about the effectiveness of Oxfam’s influencing work. I also decided it would be most useful to present a balance of what influencing strategies and tactics were found to “work well” versus those found to work less well, as per the report findings. This would help

frame the lessons as both points of pride and as provocative platforms to encourage space for more informed conversations.

My process involved creating charts to organize and compare the most significant lessons from each report. I then analyzed what appeared to be relatable and common from the various reports. I determined that each lesson should have at least three examples to ensure that a given idea was sufficiently common. The meta observations were not always directly articulated in a report themselves; at times, different overlapping findings required deeper analysis to reveal a more overarching takeaway about Oxfam's influencing. As the findings from each of the evaluations had already incorporated the necessary desk research, no additional desk research or data gathering was required for the purposes of this report.

In addition to the MEL reports themselves, I drew from conceptual frameworks to establish meaningful criteria for effective influencing, including internal Oxfam MEL guidance documents and the Advocacy Circles framework developed by Unsicker (2012). After developing the meta lessons and their evidence base, I presented my work to my supervisor in order to collaborate on crafting the appropriate language and frame for the intended audience, which included the organization's leadership and the policy and campaign managers. With the review content in place, we proceeded to co-write the remainder of the report. My supervisor focused particularly on developing a conclusion that would raise high-level, provocative questions for reflection by Oxfam's leadership.

Introduction to the Meta Review

The Meta Review uses lessons and experiences from the following 2015 OA reviews:

Activity/Moment	Campaign/Team	Level	Type of Review
Dodd-Frank 1504 Five-Year Anniversary Campaign Spike	Fueling Development & Extractive Industries	US Domestic	AAR
Corporate Campaigning Lessons from Behind the Brands	GROW/Private Sector Department	Global/OI	Strategic learning review (informal format)
Burkina Faso 1% Campaign	Extractive Industries	Regional (West African Regional Office)	WIN Case Study
3rd International Conference on Financing for Development	Oxfam Aid & Development Finance (cross-affiliate)	Global	AAR
G7 Summit	Cross-cutting (Fueling, PSD and GROW)	Global	AAR
R4 Rural Resilience Initiative in Ethiopia	Private Sector Department/ Programs Division	National (plus US & Global)	WIN Case Study

As the Meta Review’s audience is Oxfam staff who are familiar with the various campaigns and initiatives, the following descriptions will help others to contextualize these reports and the lessons that emerged. The campaigns are discussed in the order of the above chart. In addition to describing the specific piece of advocacy reviewed, I will highlight why it was potentially useful for that moment to be chosen for an evaluation, and frame the initiative within Oxfam’s global context and evolving Southern orientation.

Dodd-Frank 1504 Five-Year Anniversary Campaign Spike: Oxfam and its coalition partners have worked for nearly a decade on Section 1504 of the Dodd-Frank Wall Street Reform legislation, which addresses corporate transparency of financial disclosures. In July 2015, Oxfam America campaigned around the anniversary of the passage of the Dodd-Frank bill to publicly highlight the Security and Exchange Commission's (SEC) undue delay in and failure to issue its final implementation rule of Section 1504. The campaign spike capitalized on the anniversary moment to renew attention to 1504 in Congress and in the public, in order to apply further pressure on the SEC. For Oxfam, the spike represented the first campaign collaboration of the new Fueling Development team, which contributed to the choice to conduct a review. The team's tactics focused on secondary targets – the public, media, influential figures and Congress – to generate visible, multi-directional pressure on the SEC through convenings, “killer facts” on transparency, press releases, and digital platforms. The spike was largely US facing; overall, 1504 hopes to empower citizens from developing countries with key financial information about the multinational companies engaged in domestic extractives work.

Corporate Campaigning Lessons from Behind the Brands: Behind the Brands (BtB) is Oxfam's flagship corporate-facing global private sector campaign. The campaign takes aim at the environmental and human rights policies and practices of the top ten global food and beverage producers, using a “critical friend approach” and leveraging consumer engagement to call upon these companies to make substantial changes in seven key areas. The goal is to see meaningful improvements in corporate practices that result in better conditions for workers and improved environmental impact standards. Oxfam uses a

scorecard method to rate the quality of existing practices and drum up a sense of competition between the companies to Race to the Top. The electronic scorecard is a simple education and communication tool directed at both companies and the public. It is regularly updated to reflect corporate engagement and track policy changes, both positive and negative. Beyond the ten companies themselves, the global campaign engages secondary targets and other key actors, including transnational regulatory and certification agencies, national and local governments, and companies further implicated along the global supply chain. In addition to general advocacy, BtB has had three campaign spikes: Cocoa and Gender, Land and Sugar, and Climate Mitigation. This evaluation takes into account the entire global campaign and all three spikes in order to derive lessons and recommendations for future corporate campaigning and the BtB policy implementation phase.

Burkina Faso 1% Campaign: Gold mining is the main export activity in Burkina Faso. Led by local civil society and supported by staff at regional Oxfam offices, the 1% Campaign called on the transitional Parliament to increase the required amount of gold mining profits that is paid by transnational companies to local development funds in communities where they operate. A moment of political upheaval opened up space for civil society to build significant public and media engagement and successfully advocate for and achieve an increase from .5% to 1% of mining profits. The study explains that this increase represents a regional, agreed-upon norm that had been negotiated as acceptable by civil society and industry. The impact of these funds or the policy change has yet to be seen, as the country is currently in the implementation phase of the policy. This campaign was

chosen for review in order to learn from the momentous political and policy win, in order to potentially apply those lessons in similar regional contexts.

3rd International Conference on Financing for Development (FfD): The world's political leaders convened in Addis Adaba for the UN's 3rd FfD conference to mobilize development finance and resources for post-2015 goals. Oxfam staff from across the confederation invested over ten months to influence the outcomes of FfD by lobbying governments, pushing international political agendas and engaging media. Unfortunately, the formal outcome report for FfD did not take up Oxfam's particular policy asks on private, public or climate finance or on tax. On the positive side, Oxfam contributed to deepened awareness among the public and government actors on specific issues and built strong relationships with fellow civil society actors. Reviewing this moment of less successful advocacy offers Oxfam the chance to reflect on gaps, challenges, and needs for future advocacy planning.

G7 Summit: Oxfam staff from confederation affiliates in G7 countries attended the 2015 summit with broad advocacy objectives: first, to raise public awareness of key issues as a tactic to influence the G7 agenda, build momentum for Oxfam global campaigns and increase brand visibility; and second, to secure commitments to Oxfam policy asks by G7 countries. Oxfam was successful at engaging media and getting many of its key issues – such as coal, Official Development Assistance, and inequality – on the agenda for the summit as well as in anticipation of FfD. It is relevant to conduct reviews of high profile, recurring advocacy initiatives such as the G7 Summit in order to track Oxfam's role and

effectiveness over time and the evolution of politics, policies, and the global operating context.

R4 Rural Resilience Initiative in Ethiopia: The R4 Rural Resilience Initiative (R4) in Ethiopia is a unique review in this collection. R4 is an integrated risk management framework designed with high-level partners such as the World Food Programme (WFP) to enable poor and rural farmers to strengthen their food and income security and be resilient in the face of climate change and weather shocks. The R4 team innovated a sophisticated weather-based insurance tool that, coupled with work-for-insurance model that promotes locally owned community development, gives poor farmers access to financial and crop protection that otherwise would seem too risky for insurers.

Rather than being primarily policy and advocacy driven, R4 is an Oxfam in-country development program that has both effectively used influencing to achieve program success and key influencing outcomes with government, the domestic and international private sector, and transnational governing bodies. For example, a Memorandum of Understanding was signed in 2013 between Oxfam, the WFP, and the Government of Ethiopia to scale and institutionalize R4 into a national social safety net system, based on years of evidence-based program success; this significant partnership emerged from key influencing efforts and itself represents a key influencing achievement. The case study highlights the influencing role of R4 in Ethiopia on local, national, and global levels to demonstrate how Oxfam's evidence-based, locally driven work may contribute to meaningful, widespread influencing.

2015 P&C MEL Meta Review, Oxfam America

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Date: March 2016

Introduction

In the context of a Confederation-wide reorganization, our policy advocacy, campaigning and influencing strives to continue to be fit for purpose and impact-focused in a changing, challenging global environment. A key step in determining a course forward, our reflective learning culture compels staff and leadership to consider what is most effective from our policy advocacy and campaigning efforts, and relative areas of weakness, in order to maximize our strengths and be effective in our approaches, processes and value.

This “review of reviews” outlines common and emerging trends among OA’s policy advocacy, influencing and campaigns work from 2015. The aim is to understand the extent to which we are fit for purpose in terms of the effectiveness and impact of our advocacy and influencing, particularly given our strategic orientation and intent vis-a-vis Oxfam 2020, WIN, the ELT reorganization goals, and our evolving Theory of Change.

By definition, the report is limited in scope to those advocacy and campaign efforts which were reviewed for 2015’s MEL reviews. The commentary here is necessarily predicated on research, experience and opinions about what constitutes policy advocacy and campaigning success and what factors contribute to it. As a notable caveat, the thinking around these questions is inevitably subjective because of the challenges that arise in assessing effectiveness and in deriving lessons from experience. As such, we acknowledge that:

- Political and social change is complex and multifaceted – causal relationships are difficult to determine and the effects of specific interventions hard to isolate.
- The notion of success is invariably contested – absolute victory is exceptional and compromise is the norm, allowing for divergent perspectives as to the extent to which any result can be regarded as successful.
- Change becomes discernible only in the long term – policy and practice reforms can be slow and incremental with resolution of issues tending to occur in the long term, and even then not definitively, and with implementation, often lagging significantly behind policy change, if it is linked at all.
- Advocacy and Campaigning are fundamentally conflictual processes – this makes consequences difficult to predict or to map.
- Campaigners tend to be rarely explicit about what they anticipate accomplishing, making objective assessment of actual achievement problematic.

Purpose

This high-level “Meta Review” report captures nine sufficiently common lessons derived from six reviews, case studies and evaluations of our 2015 advocacy, influencing and campaigning efforts. The trends identified here represent our good practices and identify areas of focus for delivering effective advocacy and influencing. The cases under review represent only a select part of Oxfam’s policy advocacy and campaigning, but nevertheless demonstrate the ways and moments where these practices have been effectively applied, as well as those where we have been seemingly less effective in application and why.

Key Common Lessons and Trends

1. Capitalizing on political moments
2. Having an overarching, long-term strategy
3. Being clear about what we’re trying to achieve

4. Conducting a robust power and political analysis
5. Considering the relationship between public campaigning and advocacy
6. Having tactical sophistication: The “critical friend” approach
7. The use of convening power
8. Working in coalitions and supporting local civil society
9. Effectively using social media

These lessons are not listed in any ranking order – rather, they flow thematically from externally-facing, to strategic, operational and tactical, and consider more and less strong examples derived from practice. The natural overlaps and linkages between the different lessons mutually reinforce their strength as reasonable evidence of good practices. Deeper analysis of these trends, their implications and the relationship to the broader Oxfam vision may come through further discourse and discussion, prompted by the closing thoughts in the conclusion. The individual MEL reports that inform this review offer more thorough reflections on lessons learned.

The following P&C MEL evaluations were conducted during FY15 and are cited in this report*:

- Dodd-Frank 1504 Five-Year Anniversary Campaign Spike After Action Review (AAR)
- Corporate Campaigning at Oxfam: Lessons from Behind the Brands
- The 1% Campaign in Burkina Faso WIN Case Study
- FfD3, Third International Conference on Financing for Development AAR
- G7 Summit AAR
- R4 Rural Resilience Initiative in Ethiopia WIN Case Study

*Final Reports are available on the PADARE Campaigns and Advocacy Evaluation Catalog and in Campaigns MEL folder

The Oxfam context

It's important to place these lessons within the evolving Oxfam context and take stock of what our culture of learning can offer us for 2020. One Oxfam aims to be more strategically aligned across the confederation, taking greater direction and leadership from Southern affiliates and

country teams. The influencing capacity and function of Oxfam US has been highlighted as a key strength and asset to support the country-based and global efforts across the confederation. Among other roles, Oxfam US will work to “deliver the power of the US on behalf of the Confederation.^[i]” As per a recent guidance document, Oxfam’s new influencing platform hopes to see “high-impact influencing that delivers irreversible changes in policy, practice, resource allocation, attitudes, beliefs, and power relationships so as to maximize our collective impact on poverty and injustice and transform Oxfam, working together with others, into a Worldwide Influencing Network^[ii].” This memo goes on to emphasize the value of leveraging our experience in programs, advocacy and campaigning in order to do effective influencing.

Indeed, these 2015 reflections reinforce, to some extent, what is most effective about our current ways of working and theories of change, so we may deliberately harness and grow our influencing relevance and impact in service of this organizational change and our mission. They also underpin the expressed need to be even more inclusive, upstream, impact-focused and strategic in our planning, which has historically “northern roots,” and provoke us to infuse even greater intentionality into doing that which is most effective and sustainable.

Lessons and trends: externally-facing

1. Capitalizing on political moments

Our ability to seize a political moment or maximize the opportunities of a policy window and a relatively enabling environment has proven to be extremely effective for doing influencing that leads to concrete changes in policies and practices. In contrast, doing influencing in non-politically enabling environments, or missing political moments, presents significant challenges to making change and compromises the value of staff time and resources. In a rapidly evolving global context, we also observe how ‘political moments’ may increasingly include demand as

per broader global events and crises, such as forced displacement and climate change, where a 'moment' may be interpreted as a 'new normal' to strategically contend with.

More effective examples:

- The Burkina Faso 1% Campaign effectively capitalized on a moment of political upheaval due to a popular uprising. This meant that the transitional Parliament was inclined to act in the interest of public will. The campaign achieved a political win and allowed local civil society to become meaningfully involved in government consultations.
- The 1504 Anniversary Spike used the 5-year anniversary of the Dodd-Frank Bill as a political moment to renew attention to the outstanding rule and keep the issue of corporate transparency on the minds of the public and politicians. The moment also helped set the stage to frame and celebrate a lawsuit victory against the SEC a few months later.
- Over the course of many years, R4 in Ethiopia took advantage of the country government's interest in improving disaster risk management policies for rural farmers to build a formal partnership with a government that is otherwise hostile to civil society.

Less effective examples:

- In the end, the G7 Summit was not the political moment for influencing we had hoped for. The better moment for influencing would have been in the weeks and months prior to the actual summit when negotiations and commitments were being formulated, rather than at the summit itself. A previous external evaluation had suggested this and should have been used as a reference point; we should ensure that we institutionalize our learning.

Lessons and trends: strategic level

2. Having an overarching, long-term strategy

While campaigning is often short-term and immediate in nature, a clear sense of long-range impact and direction is critical for positioning advocacy efforts to contribute to effective, lasting change. Good long-term planning must see beyond policy wins to the relationship between policy and practice, implementation and impact. Furthermore, strategies are most effective when they are part of a coherent advocacy plan that links with other global moments and processes. In contrast, advocacy and campaigning efforts with ill-defined or too short-term strategies tend to fall short of their desired impact. ‘Strategies’ may include plans and pathways for influencing, funding, partnerships and more.

More effective examples:

- R4 in Ethiopia did effective influencing through strategic advocacy, a long-term vision for how to develop, build buy-in for and mainstream their innovation, and focused resources and planning (doing ‘deep’ versus ‘wide’ influencing).
- As the implementation phase of Behind the Brands has been developed separately from BtB public campaigning, the lack of a long-term strategy or plan for implementation had left question marks around our capacity for follow-through. However, the fact that we are prioritizing these discussions and developing strategies for implementation is a significant step in the right direction.

Less effective examples:

- Campaigning and influencing efforts for the Financing for Development (FfD) Conference would have benefited from better coordination and engagement with both targets and allies, as well as more resourcing and capacity.

3. Being clear about what we’re trying to achieve

Similar to the need for a long-term strategy and seeing beyond the ‘win’, the best advocacy and campaign efforts have clear, explicit and reasonable definitions of what they’re trying to achieve. As a result, this clarity helps teams to be more intentional and selective in choosing effective activities, partnerships and approaches. This may also require having clear evidence to support the envisioned pathway to advocacy, or a theory of change. Advocacy efforts that lack such direction tend to fizzle out or fall short of their desired impact.

More effective examples:

- Behind the Brands Campaign has a clear goal to change particular companies’ policies and practices in specific, targeted areas where human and environmental rights are threatened, supported by evidence from the companies’ public information. Planning also went into anticipating the role of second tier targets such as supply chain actors and traders in making substantive change in the lives of workers and communities.
- The Burkina Faso 1% Campaign had a specific policy ask with a clear and explicit link to local development and community empowerment. It should be noted, however, that the effectiveness of the policy at the implementation level has yet to be seen.
- In its long history, the overarching 1504 advocacy campaign has maintained a clear vision of its policy goal in both the campaigning and influencing efforts, including the latest campaign spike.

Less effective examples:

- The G7 Summit, as the After Action Review found, was relatively unclear as to what the policy advocacy outcomes would be.

4. Conducting a robust power and political analysis

Conducting solid power and political analysis is essential to understanding the role of and relationship between targets for influencing and other involved parties. This analysis affects campaign strategizing, resourcing, coalition building, policy development and more. Without developing and meaningfully applying a proper power analysis, advocacy and campaign efforts tend to fall short and follow an unnecessarily indirect pathway to influencing.

More effective examples:

- R4 in Ethiopia made smart partnerships with influential and expert allies and rights-bearers at multiple levels and with an understanding of the right influencing targets to make changes to government policies and practices.
- A rigorous power analysis for Behind the Brands led to an innovative and coherent public campaign strategy and tactics to effectively apply public pressure on private sector targets.

Less effective examples:

- While the FfD Conference team had conducted an accurate power analysis of the key players and moments, this was not backed up by resources within Oxfam to take it forward as effectively as it could have been.
- The influencing efforts of the overall 1504 campaign expertly honed in on key influencing targets to achieve our policy goals. Unfortunately, the 1504 Anniversary Spike pursued relatively weak pathways to influencing key decision makers, resulting in a minimal effect on our goal.

5. Considering the relationship between public campaigning and advocacy

Our current financial context is reinforcing the importance of questioning when, how and why to mobilize the public in order to complement other strategies. Choosing public campaigning as a

tactic must factor in the expected return on investment on the outcome and impact level. Ideally, public campaigning serves to help strategically influence decision makers toward generating sustainable, positive impact in the lives of vulnerable people. Public campaigning, when done well, also serves to engage the public and raise awareness of hidden and marginalized realities. At best, campaigning has the potential to achieve both public engagement and influencing outcomes based on the alignment of context, target, the issue and 'the ask'. However, based on the same criteria, not all public campaigns have this potential.

Challenges: Across the board, INGOs can fall into a trap of mobilizing supporters for the sake of campaigning (often to stay relevant and visible or to fundraise), instead of selecting this tactic for being the most effective and influential approach to achieve influencing goals. Public organizing and advocacy at the national level must contend with how to work with a domestic audience that cares about global inequality in [political] contexts where pathways to change are less open for the public to make a difference. It is therefore difficult but necessary to ask hard questions about the relevance of supporter and public as a tactic during planning, in order to apply resources in a way that optimizes and prioritizes influence, impact and mission.

More effective examples:

- The Burkina Faso 1% Campaign rallied popular support for a policy issue that targeted Parliamentarians, who were both the key decision makers to affect change and accountable to the public and civil society who were the lead voices of the campaign.
- Behind the Brands used public campaigning because the public (consumers) are the relevant group to call out companies to improve their insufficient policies and practices, as the companies are accountable to and reliant on consumers.
- R4 in Ethiopia is a good illustration of effective influencing that did not pursue campaigning as a tactic. Objectives were pursued with a different approach to targeted

public engagement – the public-private-people partnership approach – that successfully involved the relevant impact group as empowered rights-holders and leaders in program development.

Less effective examples:

- The 1504 Anniversary Spike carefully used public campaigning as one of a number of coherent strategies, but this particular tactic was less effective than others given the opaque relationship between the SEC as the spike’s influencing targets for policy action and the public as a secondary target for engagement.
- While the Behind the Brands public campaign was a relevant approach given the potentially strong influencing role of consumers on companies, the independent evaluation nevertheless found it difficult to correlate companies’ engagement in the campaign with responses or changes to policies or practices, which would theoretically lead to impact.

6. Having tactical sophistication: The Critical Friend approach

Oxfam has a good reputation for having relative sophistication in its analysis for an optimum influencing approach. The critical friend role – using arms-length partnership as an insider-influencing tactic – is one such hypotheses of how change might happen. On an organizational level, this approach and positioning serves to reinforce our unique voice and trusted position in the influencing spaces in which we operate, particularly for our private sector work. This well-crafted advocacy and campaign strategy is most effective when it is complemented by other best practices, such as conducting a rigorous power analysis and developing a long-term impact-oriented strategy.

Multiple 2015 MEL reports identified distinct strengths and challenges to this strategy that are worth highlighting here:

Strengths: Being a critical friend can generate a more receptive attitude among targets. As well, this approach gives Oxfam deeper engagement with and understanding of targets, allowing for better tailored and target-relevant engagement strategies and advocacy asks.

Challenges: Being a critical friend can also result in lowering our expectations, for example by compromising or emphasizing asks that seem 'realistic' to targets instead of ambitious. This can complicate working in coalitions and jeopardize relationships with some allies.

More effective examples:

- The Behind the Brands Campaign represents a definitive example of the critical friend, using the 'carrot and stick' approach to popular campaigning and company engagement to promote public accountability for and partnership in making policy and practice changes. The campaign
- In the Burkina Faso 1% Campaign, Oxfam helped local civil society to rally public pressure on the government while simultaneously working in consultation with the government to help build their case and odds against the opposition of the powerful mining lobby.

Lessons and trends: operational/tactical levels

7. The use of convening power

Our convening power represents another point of pride for the organization and is becoming increasingly central to our influencing role as we move toward Oxfam 2020. The enthusiasm of diverse actors from around the world – in government, private sector, civil society and academia

– to participate in our convening illustrates the place Oxfam has in helping shape global conversations and push forward a value-driven, pro-poor development and policy agenda.

Most effective examples:

- In addition to a Hill event, the 1504 Anniversary Spike campaign convened an expert panel for financial industry actors and investors. The event helped expose and onboard new players to the role of community consent tools and transparency legislation in risk management and the relationship to the investment market.
- The Burkina Faso 1% Campaign convened public debates on local and international media outlets that helped rally support from the public, as well as a public conference and workshop for media to educate them in the stakes of the campaign and the mining sector in West Africa. This led to significant and informed journalistic campaign coverage.

8. Working in coalitions and supporting local civil society

We know from practice and theory that working in coalition with other NGO voices and influential allies strengthens the credibility of an advocacy ask, demonstrates sector and cross-sector solidarity, brings more voices and expertise to the table, helps reach a broader base and deepens capacity. While the common political and operational challenges of coalitions can often overshadow their value, well managed, strategic coalitions are overwhelmingly positive and effective to promote inclusion and change. As well, it is critical to prioritize the inclusion of local civil society and other self-representing groups and to promote the capacity and visibility of local actors to advocate for their own rights, as per the tenets of sustainable development, self-determination and social change.

Most effective examples:

- Oxfam helped to fund civil society partners in the civil society-led Burkina Faso 1% Campaign and to raise their profile and voices with government through involvement in public consultations.
- While the 1504 Anniversary Spike did not involve the PWYP coalition as much or as meaningfully as in other moments, the highly visible and ongoing solidarity of the coalition plays a significant role in all 1504 advocacy efforts.
- R4 in Ethiopia's public-private-people partnership model sets a progressive new standard for meaningful inclusion and participation of local civil society actors and impact populations.

Less effective examples:

- The FfD Conference AAR raised learning points for better coordination, preplanning and cohesive message building with fellow civil society actors and more effective ways of working with Southern partners.

9. Effectively using social media

Social media, and other new technologies, are increasingly closing the knowledge, access and visibility gaps of marginalized populations around the world and are increasingly valuable for effective advocacy and campaigning. FY15 saw us make more and less effective efforts to apply this important tool. In our emerging work, it is essential for us to be smart – and become even smarter – about effective social media and continue to grow our capacity to capitalize on this game-changing social innovation.

Most effective examples:

- Burkina Faso 1% Campaign used social media to both educate the public about the campaign issue and demonstrate popular support for the new policy. Public engagement

and outcry were strategically critical as the campaign targets were especially vulnerable and accountable to appease the public's will.

- The G7 Summit rallied support for calls for the global tax body through social media, crucially as part of a longer term global advocacy objective
- The BtB Scorecard effectively served as a social media hook and ultimately was stronger as a public engagement tool than a target-influencing tool.
- Operationally, the design and implementation of the 1504 Anniversary Spike social media efforts resulted in strong public engagement. However, the public engagement was not as strategically significant for influencing, as per the lessons around the relationship between campaigning and advocacy and conducting power analyses.

Looking forward

In their totality, these 2015 evaluations and reviews clearly validate our approach to analysis, our prioritization of the rights-based approach, and the sophisticated and flexible application of appropriate Theories of Change. Knowing that no single prescription can solve the problems of inequality, poverty and injustice, this review also highlights opportunities for reflection and fine-tuning of our advocacy and campaigning to maximize our effectiveness, to apply resources wisely and to focus on sustained impact.

In a shifting internal context, Oxfam America's ideal role is to lead by supporting and following those with clear national agendas with knowledge, energy, communications capacity and political will, as illustrated by substantial parts of this review. The lessons in this review further provoke us to be thoughtful, strategic and inclusive in our work in order to uphold our organizational values while pursuing change. Ultimately, challenging power dynamics and social norms – in ways that change the environment in which policy is made – is vital for giving voice and influence to marginalized people and for helping to ensure that change is sustainable.

On the broader sector level, we know that change is not so easily achieved or quickly winnable, and that nobody wants to be associated with advocacy or a campaign that doesn't win. Even in the policy domain, the focus will be on small wins and rearguard actions. There's nothing wrong with small victories, but there are different dimensions, and scales, and timescales of change. The caution is that if we set thin objectives, we'll get thin change. The risk is that advocacy and campaigning could increasingly become about change within the system not to the system, i.e. change-lite. Anything too difficult will be outside the INGO sector's remit. Everyone will be successful, but it will just be difficult to tell what the actual difference is.

Indeed, more broadly, as social and political contexts evolve, the space for meaningful change through traditional issue-focused INGO advocacy appears to be progressively shrinking. There is a risk that the future for INGOs may be one of fighting increasingly rearguard actions in increasingly unfavorable conditions, as rights, services and material conditions are increasingly eroded. We propose three reasons why this is possible:

1. In a world of austerity and a shrinking financial pot, issue-specific advocacy and campaigns are more likely to be in a zero-sum game. Campaigns can end up operating in an "issue marketplace" where some "win" at the expense of others. (For example, funding for humanitarian response v. development)
2. Representative democracy is in malaise, reducing conventional opportunities for influence. Government and governance are becoming increasingly shambolic. Power is becoming diffused, fragmented, and privatized. The problem becomes the system and how it is conceived, versus how the various elements work within it. Efforts to get things to work a bit better than they otherwise would, can be vital, but are more at the level of symptoms than causes.

3. Following the economic crash of 2008 and the subsequent fragile recovery, refusing to accept the world as it is, is both a more compelling and a more viable standpoint. This is the worldview modeled by social movements, such as Occupy, and manifested in protests in around the world. NGOs that focus on mitigating the worst effects of the system risk falling behind the curve.

With these in mind, Oxfam faces some big, strategic questions as a key player in the INGO advocacy community in the coming years. Is it time that the INGO component within civil society became more proactive in challenging dominant ideologies and addressing deeper, structural barriers to social justice? How much is advocacy about systemic change, how much is it about pushing on (or walking through) half-open doors? How can Oxfam use the lessons here to stimulate discussions that help to drive our effectiveness – strategically, sustainably and mindfully?

[i] FY17 Priorities Memo: Message to Staff, Ray Offenheiser, October 2015

[ii] Oxfam Campaigns New Governance Structure, Oxfam International, March 2016

Evaluation and analysis of Meta Review through core advocacy frameworks

The policy advocacy frameworks offered by Unsicker (2012) and Shultz (2002) provide a useful theoretical grounding for the lessons identified in the Meta Review. Overall, the Review is consistent with these frameworks, reinforcing the importance of reflexively using theory to inform practice and vice versa. As theorists and practitioners, both promote a mindset toward advocacy that incites the need to use logic, embrace complexity and be systematic while also being flexible. Lessons from Oxfam's work introduce new practices and ideas that complement the frames, such as the critical friend approach and the use of convening power. Qualifying the Review within these tools further encourages the relevance and value of these evaluations for Oxfam.

Unsicker's (2012) Advocacy Circles visually depict the nature of and interdependent relationships between the various inputs and considerations for doing effective advocacy and campaigning. According to Unsicker, these elements include: the broader operating environment (context), the actors and interests involved (politics), the specific policy issue and change goals (policy), the approach to influencing (strategy) and the duty of advocates to balance and incorporate each of these ingredients into their thinking and practice.²⁶ Each of the lessons from the Review fulfill and correspond with the circles, suggesting that the Review as a learning document provides a thoughtful and holistic set of reflections and

²⁶ Unsicker, J. (2012). *Confronting Power: The Practice of Policy Advocacy*. Sterling, VA: Kumarian Press.

recommendations for Oxfam. For example, “considering the relationship between public campaigning and advocacy” invokes the concepts of strategy, politics and advocates and the ways they interact. “Capitalizing on political moments” speaks to the importance of context as the basis of and a driver for thoughtful strategy development. More tactical lessons, such as the “critical friend approach,” offer innovative approaches within the strategy and politics circles.

Unsicker (2012) also describes the importance of doing evaluations and learning exercises to promote thoughtful, informed, best practice-driven advocacy and campaign planning. He explains that although advocates and organizations often have limited capacity or time to pause for meaningful reflection, this practice boosts the potential and effectiveness of the very outcomes organizations seek to achieve. Asking critical questions about impact, outcomes and process drives intentionality and inspires better, more critical advocacy work in the future. Indeed, Oxfam’s commitment to MEL and reflective practice demonstrates how organizations can maximize this tool and way of thinking in practice.

Shultz’s (2002) book lays out a similar set of criteria for effective advocacy and campaigning.²⁷ Shultz offers a guide for democratic activism, giving detailed insights into different tools used by advocates, and frames the way democratically-run states, with citizen engagement in policy making, can and should steer governance systems to best

²⁷ Shultz, J. (2002). *The Democracy Owner's Manual: A Practical Guide to Changing the World*. New Brunswick, N.J.: Rutgers University Press.

serve constituents. His Advocacy Road Map calls for similar considerations to Unsicker's and further bolsters the lessons in the Meta Review. For example, Shultz's depiction of strategy planning is particularly relevant for linking the idea of having a long-term strategy with knowing what you're trying to achieve, doing problem and power mapping, and considering the right tools to achieve those ends (such as public campaigning versus targeted advocacy). He lays out simple questions for advocates to ask themselves for thinking expansively about strategizing: "What do you want? Who can give it to you? What do they need to hear? From who do they need to hear it? What actions can deliver that message effectively?"²⁸ These questions offer a specific and holistic set of starting blocks for doing effective advocacy planning. Shultz also emphasizes the importance and dynamics of working in coalitions for strengthening issue inclusion, public image, resource and moral support.

Perceived differences between the Meta Review and the two frameworks actually provide complementary and mutually enhancing ideas. In their work, Unsicker (2012) and Shultz (2002) both highlight the importance of research to the process of building informed policy solutions and understanding a given policy issue in depth. Although it is not a standalone lesson in the Review, Oxfam does its best to practice evidence-based policy making; the idea is referenced in the lesson concerning being clear about what initiatives

²⁸ Shultz, J. (2002). *The Democracy Owner's Manual: A Practical Guide to Changing the World*. New Brunswick, N.J.: Rutgers University Press, p. 72.

aim to achieve. Particular tactical lessons from the Meta Review – the power of convening power and the critical friend approach – offer useful examples of how to blend political mapping, target engagement, and coalition work to achieve effective advocacy ends.

Oxfam contextual analysis

Maximizing the utility and relevance of the Meta Review requires positioning it within the context of Oxfam’s transition, as well as within the emerging changes in INGO advocacy. Oxfam America is currently in the process of shaping its new ways of working in a “2020 world.” The initiatives and lessons captured in the Review speak to OA’s readiness for this shift – what’s happened to date versus what’s poised to happen in the future – and can help contribute to the process of planning. While the spirit of 2020 is well reflected in sector’s emerging trends, the proof will certainly be in the pudding; operationalizing this vision well will drive its potential for success and impact. As both the Review and literature suggest, “doing well” requires that planning prioritize the upstream inclusion of global offices and partners who will be most affected and involved downstream, being impact-focused, and being strategic in order to infuse even greater intentionality into doing that which is most effective and sustainable.

Applying the Meta Review through a 2020 lens

The initiatives used in the Meta Review may be divided into examples of current Southern leadership in influencing, and examples where Northern affiliates currently play a dominant role in campaign strategizing and implementation. As outlined in the latter

examples, it will be particularly critical for Oxfam to consider how the values of 2020 become reflected in the future planning and orientation of these streams of work.

Current examples of Southern leadership

R4 in Ethiopia is perhaps one of the better examples of how One Oxfam as a theory can succeed in practice. This initiative can serve as a model for Southern-based and country-level leadership from development to implementation, a focus on community capacity building, integrating multi-level influencing and engagement into programming, and regional, results-based program scalability. Also of note is the role played by Oxfam America and other Northern affiliates in this initiative, providing key, high-level influencing support and relationship building, as well as funding and technical support.

The Burkina Faso 1% Campaign also demonstrates how Northern affiliates such as Oxfam America may best support domestic civil society-led advocacy efforts, with primary support and engagement to local civil society funneling through Oxfam's regional office. The 1% Campaign embodies much of what is deemed best practice in the literature and the Review, including being nationally led, aimed at empowering citizen activism, and using northern-based influencing access to tap the power of international media and government attention to apply top-down pressure on Burkina Faso's Parliament as a complement to ground-up advocacy.

The role of Northern affiliates for transnational influencing

The G7 and FfD are both important transnational influencing moments where it is certainly appropriate and necessary for affiliates like Oxfam America to drive policy and campaign leadership on behalf of the confederation. Based on the 2015 evaluations, these advocacy moments were moderately effective but would in the future benefit from reflective planning based on the lessons from those individual reports as well as the Meta Review. Considering the initiatives' seeming results gap in the context of the 2020 shift, there is an opportunity to turn the more focused, concentrated role for Oxfam America's influencing into even more productive and intentional campaigns surrounding these global influencing moments.

The Meta Review and lessons from literature provide a useful filter for analyzing the readiness of Oxfam's Northern-led global campaigns for One Oxfam, in this case the private sector-facing Behind the Brands Campaign and the Fueling Development US-based 1504 Campaign. BtB has arguably achieved stand-out influencing outcomes, including extensive public and key corporate engagement in issues surrounding human and resource rights; access to harder-to-reach actors along the food production supply chain; staking Oxfam's claim as a connected and powerful leader in both private sector and food justice advocacy; and a number of high-level policy commitments by some of the targeted food and beverage companies. On their own these outcomes suggest campaign success and reflect the kind of US-facing and transnational influencing and mobilization that Oxfam America should continue to pursue.

However, the largely Northern-based campaign strategy planning has today resulted in a problematic narrative flow from policy advocacy to policy implementation. In the wake of these high-level influencing outcomes, Oxfam rightly finds itself wanting to ensure that the policy commitments bring positive changes on the ground by playing watchdog, critical friend, or advocate at local levels. Yet the exclusion of country and regional offices in upstream campaign planning has presented limitations to the full, successful follow-through that Oxfam envisions.

Objectively, it reads as if there was an implicit expectation of, or disregard for, these program implementing offices having the capacity, skill sets, or interest to carry out the next steps necessary to drive and monitor policy implementation, without having been meaningfully included in the planning process. To remedy this in future global campaigns, Oxfam is encouraged to apply its own lessons and consider best practices – being inclusive, strategic, methodological, and clear about objectives and needs during planning. Intentionally flattening the classic global hierarchy is essential if wedding global-to-national influencing and local ownership under the One Oxfam umbrella is to succeed.

The US-based 1504 Campaign focuses its policy advocacy on US corporate transparency legislation, based on a Theory of Change that links financial disclosures by transnational extractives companies to the empowerment of national actors and civil society in affected countries. The argument holds that country governments and citizens have the right to know what profits are being made at their expense and how fair their cut is; that

transnational companies will “behave” under public scrutiny; and that greater public accountability will lead eventually to better political and economic outcomes and equality in poor states. The theory behind transparency legislation speaks to a common principle of “knowledge is power.” However, the theory lacks the empirical evidence to show that poor countries and citizens do better when they have greater access to this kind of financial information. If Oxfam America is continuing its commitment to the 1504 work, interrogating this alleged disconnect and prioritizing a strategic, evidence-based plan for implementation will be essential to its success.

Broadly speaking, a 2020 vision suggests that global influencing campaigns should be primarily informed by the value of the driving concept or policy ask at the country and community level. Both BtB and 1504 represent Northern-facing influencing campaigns within larger global campaigns – the GROW Campaign and the Extractives Program, respectively. Both cases also demonstrate how a different approach to Northern campaign planning could promote more inclusive and long-term success. The following section suggests ideas for implementation that may help guide a 2020 influencing model.

On implementation: thinking about 2020’s impact on influencing

A key challenge will be developing and implementing an operating framework for 2020 that is strategic, methodological and inclusive. The realignment of Oxfam’s work into three global themes under a collective model will have dramatic impacts on the way the organization operates at all levels. For Oxfam America, the thematic shifts will undoubtedly present a challenge for currently disparate teams and divisions to consolidate

and streamline their work, as well as manage the politics of this process. In the flurry of change, functional needs such as organizational charts and budgets tend to take priority. In addition to these implications of the thematic shift, however, there is an additional challenge to anticipate and plan for the way 2020 will – and should – impact the way Oxfam America does influencing.

What might it mean for 2020 to impact Oxfam America’s influencing? If One Oxfam aims to take greater leadership from its Southern affiliates, Oxfam America will be inclined to approach its work more substantially vis-a-vis this line of thinking for its global campaigns and US-facing and transnational policy advocacy work. For campaigns at global and US levels, this means adapting and being intentional about an internal process for determining what to prioritize, who is involved and when, and how decisions are made. One positive outcome of this shift should see Southern affiliates taking a stronger role further upstream in the strategizing and decision making process. Furthermore, Oxfam can deliver even stronger links between influencing and policy wins to implementation and follow-through with country-level impact. Although this paper does not delve into the process of or suggestions for strategizing for policy implementation, Stachowiak et al (2013) offer a useful discussion on the role for advocates in implementation beyond policy wins.²⁹

²⁹ Stachowiak, S. et al (2013). *Beyond the win: pathways for policy implementation*. Seattle, WA: ORS Impact and Atlas Learning Project.

One Oxfam also seeks to boost influencing at the national level. Oxfam America has a broad and adaptable suite of influencing tactics, which itself is critical knowledge. Having this sophistication in advocacy and campaigning creates an opportunity to laterally support the efforts and growth of offices in the Global South in developing their influencing and leadership chops. Doing indirect influencing by helping build the influencing capacity and skills of the wider confederation is a significant value-add by Northern affiliates. Indeed, the literature encourages that organizational-wide influencing includes building out this type of internal capacity and knowledge. Although their explicit intention is to support learning and knowledge sharing without an influencing angle, Oxfam's Knowledge Hubs present a strong opportunity to provide a resource and network to support in-country influencing through thematic, horizontal knowledge sharing.

As the analysis of the initiatives from the Meta Review shows, strategically approaching how 2020 is incorporated in practice will pay in dividends. Being intentional about this process at this critical juncture can help make or break the success and validity of the 2020 vision in action. Being explicit will boost a sense of ownership and transparency within the organization and will also be important to demonstrate accountability and authenticity to funders during this vulnerable period of change. The following offers useful, but not exhaustive, prompts for starting the conversation about cross-cutting, proactive planning:

Inclusion: What might the inclusion of Southern affiliates in upstream planning for US-based influencing work look like? How might Oxfam America develop an explicit bridge

between Southern affiliates' input, needs and interests to informing policy and campaign goals? What might be implications on the prioritization, content, delivery, and direction of campaigns and policy asks? How does Oxfam define "leadership," when referring to a more Southern-led confederation?

Methodology: What are the important criteria for ensuring meaningful inclusion of southern affiliates? How does inclusion become meaningful, rather than just in name? How will Oxfam America prioritize its campaigning and do so fairly, consistently and predictably? In what ways will policy development be more or differently informed by input and leadership from southern affiliates? How might it be useful to represent or visualize this process as a tool? What do Southern and Northern staff feel are the important criteria and steps for including southern affiliates in planning and decision making? What might an internal accountability system look like? What kind of communication works best at different phases of planning?

Strategy: What is the Southern leadership agenda and how does this methodology include and support it? What are the short, medium and long term considerations for driving sustainability and impact from the policy and influencing level to the lives of constituents?

Critical observations in closing

A realistic discussion of implementation must address the financial drivers of this transformation. The thematic shifts are an opportunity to focus Oxfam's work around issues and trends that have emerged at the global level to be most current and pressing –

food security and production systems, adaptation to climate change, the rights of people in humanitarian crises, the global economy, unequal systems of power, and responsible development. On the most practical level, this shift in focus is also coming at a time of real budgetary limitations for the broader confederation; indeed, the shift is largely driven by global funding needs. To this end, the Meta Review and this capstone are reflecting on an evidence-base of work that may in ways cease to exist, even in cases that are reflective of the Southern focus to which Oxfam aspires.

For example, the human and environmental rights work of the Global Extractives Program has experienced significant cuts at the country and country engagement level, due to restructuring. This work supports and defends civil society and indigenous communities in countries where rights are or are at risk of being violated by international oil and gas and mining companies. Oxfam's role is critical for supporting local civil society capacity and coalitions; as well, leveraging the Oxfam name is a huge value-add for uplifting the perceived credibility of communities and domestic advocates to government and international audiences. However, as this stream of work wanes, there stands to be a felt impact on the ground in terms of resources, support, and other changes to Oxfam's ability to continue contributing to these local advocacy efforts. This will likely also have implications for Oxfam's credibility with civil society partners at the country level. Overall, what these sacrifices mean for Oxfam's ability to truly fulfill its 2020 vision has yet to be determined.

The financial component of this shift also speaks to aligning meaningful work with that which may be most attractive and plausible for fundraising. An early memo framing the draft form of the new themes included “empowered citizens in unequal economies,” which has since been replaced with “accountable development finance.” The two ideas ostensibly overlap, as empowerment and accountability both imply the rights of citizens. However, the orientation of the new theme pivots away from a citizen and rights-based focus, toward a donor- and power-facing focus.

To be fair, Oxfam currently takes both of these approaches in tandem and knowingly embraces their positive tension. Oxfam’s reputation provides a critical platform for speaking truth to power and elevating stories that speak to the realities of poverty, inequality and injustice. Playing the part of public campaigner and critical friend at the global level serves to hold space in an enabling environment for pro-poor development agenda, and is not easy.

Yet the distinction between the two sets of language has nuanced implications, both optically and perhaps substantively. For example, “active citizenship” has a seemingly less logical grounding in “accountable development finance,” and yet this work will be funneled under this heading along with many other current foci. While it may not be the intent, this streamlining and language potentially shrinks the space for continuing with active citizenship work in the long-term. Oxfam would do well to be mindful of and openly critique this risk, in order to make explicit its intentions and plan to maintain citizen-facing work. Balancing these dual goals – citizen engagement and speaking truth

to power – in positive tension works as a narrative that reflects the complexity of human rights and development work. But in tangible ways, actively defunding the citizen empowerment work may tip the scale off balance.

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