

For a
just world | without
poverty



Oxfam Australia strategic plan 2007–2013

Mid-term review report summary
December 2010



Overview

Rajasthan, India. Kotha Bai and her daughter in law Raj Kumari work harvesting in the village of Purumpur, October 25, 2010. Photo: Ami Vitale/Oxfam.

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Cover photo: Malawi, Southern Africa. “We pool our labour to cultivate large pieces of land. That way we can grow more and attract better customers — like the Mulanje canning factory. I hope the benefits of the scheme continue so that our children have a better foundation for the future” Leyla Kayere, 76. Photo: Abbie Trayler-Smith/Oxfam.

Oxfam Australia’s strategic plan for 2007–2013, *A just world without poverty*, contains a vision that by 2013:

“Oxfam Australia will be an effective force for social change, equity and justice, enjoying the active support and involvement of many thousands of Australians, as well as strong partnerships and alliances around the world.”

This review finds that in most areas we can assess progress against the plan as being “good” or “mostly on track”. However, in the areas of *economic justice and rights in crisis*, and in the inter-linked domains of *organisational cohesion, accountability and living our values*, our positioning for the future needs to be strengthened. This is, in part, because of several key trends, which we will need to respond to.

It is likely our world will see an increasing scarcity of resources and volatility of food and oil prices, impacting on many of the world’s citizens, which will have unpredictable effects. Our current economic, political and social systems and institutions will not adequately protect people from these shocks. Changes in global geo-politics and the “rise of the east” will shift power balances. Demands for resources and for duty bearers to be more accountable to provide human security and fulfil human rights will become more prevalent and potentially involve more conflict. Development agencies will come under increasing scrutiny as organisational and government aid budgets increase. Individual supporters of non-government organisations will also seek to be more closely connected to the work of development agencies.

Responding to these **challenges** requires addressing several common issues, which would have a positive impact across all areas. They include:

- clarifying what successes looks like;
- improving our ability to work across the organisation;

- making clearer links between our external and organisational change goals;
- being the “change we want to see”;
- engaging and communicating more effectively with our stakeholders; and
- addressing the overwhelming feeling of too much change in the agency.

We don’t need to radically change our focus, but strengthen the way we work as an organisation. We suggest six possible “acupuncture points” as triggers that are likely to produce what is needed to address our positioning for the rest of the plan period.

These actions are focused in the following areas:

- fostering an integrated approach;
- developing an organisation-wide vision on rights in crisis;
- promoting effective leadership;
- generating better evidence-based learning and decision making;
- refining our public identity; and
- achieving clarity on our growth trajectory for the future.

Introduction

As part of our commitment to learning and accountability, our organisation undertakes regular reviews and evaluations of its work. This mid-term review has been undertaken three years into *A just world without poverty*, the agency's strategic plan for the period 2007–2013. The review has attempted to answer the broad question:

“How effectively have we pursued our goals and responded to the changing context, and is our organisation and strategic plan fit for purpose?”

Approach

The review has drawn upon the results of existing reflection and evaluation processes to make an overall judgment about progress and positioning. These have been complemented by

surveys of staff, members, partners and supporters, and reviews of external debates, articles and papers. In addition, independent researchers undertook several in-depth studies, with a particular focus on our accountability and performance assessment processes and humanitarian work.

Findings and actions

The findings and suggested actions will inform our direction for the remaining three years of the plan, including the budget processes.

The actions are focused on key organisational-level processes and priorities. Other more specific findings contained in the full report will inform other levels of decision-making, for example, within sections or change goal hubs (see *full mid-term review report*).

Goals and highlights

External change goals and central commitments:

1. Economic justice

More women and men will realise their right to secure and sustainable livelihoods.

2. Essential services

Women and girls will realise their rights to accessible and affordable healthcare, education, water and sanitation.

3. Rights in crisis

All women and men in humanitarian crises will be assured the protection and assistance they require, in a manner consistent with their human rights.

4. Gender justice

More women will gain power over their lives and live free from violence and there will be an increase in women's engagement and leadership in institutions, decision-making and change processes.

5. Active citizenship and accountability

We are committed to helping people living in poverty achieve their full rights as citizens. We are also committed to supporting them hold government, corporations and international organisations, including Oxfam, to account.

External goals: highlights

- *Close the Gap* helped secure an additional \$1.6 billion in government funding for Aboriginal and Torres Strait Islander health.
 - *Make Poverty History* contributed to the achievement of a bipartisan commitment to increase the Australian Government aid budget to 0.5% of gross national income (currently 0.33% of GNI).
 - We mobilised nearly 150,000 activists in support of our campaigns.
 - We responded to 24 emergencies — in 2009–2010, 9 of them concurrent.
 - We contributed to a focus on financing for climate change adaptation (\$100 billion pledged at the United Nations climate change summit in Copenhagen).
 - More than 180,000 young Australians were engaged on social and environmental issues using digital media and other creative mediums.
 - Joint Oxfam HIV and AIDS program in South Africa reached approximately 103,600 people directly (66% female) and 495,000 indirectly.
 - Our response to the 2004 Asian tsunami was successfully closed.
 - We strengthened and increased our work on gender-based violence.
- ### Organisational change goals
1. Be a **cohesive global agency**
 2. Support our **people**
 3. Be a **highly accountable** agency
 4. Be **innovative, flexible and responsive**
 5. Grow our **income**
 6. Grow and mobilise our **Australian constituency**
 7. **Live our values** in our daily life
- ### Organisational goals: highlights
- In 2009–2010 3,174 volunteers contributed more than 115,000 hours to Oxfam — well beyond targets.
 - In 2008, our public annual report won the PricewaterhouseCoopers *Not For Profit Transparency Award*.
 - We attracted research grants totalling \$1.3 million and a \$3 million research partnership with Monash University.
 - We maintained growth in income from public and institutional donors, despite the global financial crisis.
 - Awareness of Oxfam's public brand increased to 10%.
 - We developed a reconciliation action plan, environmental sustainability plan, diversity policy, and established a gender coordination group.

What's going on?

There are a number of **significant trends** that we need to consider as we think about the first three years of our current strategic plan. Some are the continuation of long-running changes that were apparent when the plan was created. Others are either newer trends or factors that have become more important in the years since the plan was started.

Key trends

More shocks

The world is experiencing more “shocks” and this is a trend that is likely to continue. The Global Financial Crisis and emergence of the G20, the large global food price hikes of 2007–2008, the mega-disasters experienced in Haiti and Pakistan are all examples of these. The growing inter-connectedness of our financial, communication and social systems means that shocks in one part of the world spread quickly to other parts of the world.

Climate change

Climate change is clearly likely to make these shocks worse, as well as produce a number of additional effects, such as greater migration and the growth of environmental refugees.

Gender inequality and women's rights

There has been greater attention, at least at a rhetorical level, to the issue of gender inequality and women's rights. This suggests there is finally a growing recognition of the well-known fact that achieving gender equality is essential to the elimination of poverty. It also highlights the stark reality that in many parts of the world gender-related indicators are not improving and domestic violence is increasing.

Millennium Development Goals and aid

The Millennium Development Goals (MDGs) and aid effectiveness have been the subject of much publicity and debate, including questioning about the willingness of those that are part of the aid “industry” to overcome their vested interests. Australia's commitment of 0.5% of gross national income means a doubling of the aid budget by 2015, and AusAID becoming the fifth or sixth largest governmental department in terms of spend. This means that public scrutiny on aid and its overall effectiveness will increase. Also, the number of “non-traditional” donors, such as China, who are not part of the

Paris and Accra agreements on aid effectiveness, is growing.

Governance and corruption

There has been continued emphasis on tackling governance and corruption, but also a growing recognition that attempts by donors to date have been overly focused on the “machinery of government”, and have largely ignored informal governance institutions such as clan, religious or customary groups. There has been an explosion of initiatives to enhance social accountability, often using social media. There are many examples in the aid and natural resource arena designed to fight corruption and promote transparency and accountability.

Conflicts and scarcity

There has been a decline in the number of conflicts since the end of the Cold War. However the failure of peace deals, the destabilising impact of climate change, and the associated competition for scarce resources cast doubt on a continued decline. The economic cost of conflicts is estimated to be roughly twice as much as the world has spent on international aid in recent decades.

Quality of life debates

There is growing debate about how we should measure progress and wellbeing. In particular there is an emerging view that we have over-emphasised economic indicators at the expense of other measures. This has led to ideas such as “prosperity without growth” being considered within some mainstream policy discussions.

Complexity of development

There is a growing understanding of the complexity of development processes. Systems that involve people do not behave like predictable machines. This means the outcomes of development work is often uncertain.

Addressing inequality

The challenge is addressing increasing inequality, as well as absolute poverty. About 75% of the poorest people in the world live in middle-income countries¹. The biggest causes of poverty in many places, therefore, are not the lack of development in the country as a whole, but the marginalisation of particular groups in countries that are otherwise doing well. This suggests the need for us to re-think how aid and development is understood and delivered.

Gressier, Haiti. An earthquake on January 12, 2010 leveled Haiti's capital Port-au-Prince. Oxfam assisted people with water, sanitation, material distribution and cash for work schemes. Photo: Pablo Tosco/Oxfam.



¹ Sumner, Andy. Sussex, 2010. *Global Poverty and the New Bottom Billion: What if Three-Quarters of the World's Poor Live in Middle-Income Countries?* IDS Working Paper.

How are we going?

External change goals and central commitments

Despite major changes in the external environment, performance against the external change goals and central commitments in the first half of the plan has been relatively good. We need to pay particular attention however to **economic justice** and **rights in crisis**, for the remainder of the plan.

1. Economic justice

Overall progress against the plan



Positioning for the future



What does it mean?

The **economic justice** area faces severe challenges such as climate change and the need to challenge powerful global players — those institutions, corporations and governments who have vested interests in the status quo. It is a highly complex area, yet also represents a high proportion of our program work. We need to improve our ability to “make sense” of this area, and better affect change at a policy level.

Photo: Abbie Traylor-Smith/Oxfam.

2. Essential services

Overall progress against the plan



Positioning for the future



What does it mean?

We have effectively supported the delivery of **essential services** that reach vulnerable and marginalised groups and address issues of inequity and diversity in innovative ways. Although we have tried to build the capacity of government agencies and other service providers, we need to do more to empower citizens to hold governments and others to account for the provision of adequate, appropriate and equitable essential services.

Photo: Jerry Galea/OxfamAUS.

3. Rights in crisis

Overall progress against the plan



Positioning for the future



What does it mean?

For **rights in crisis**, we have strengthened our ability to respond to emergencies; however disasters will continue to occur more frequently and on a larger scale. For the next three years we need to confirm our position within Oxfam International, in terms of leading humanitarian work in Indonesia and Sri Lanka in particular, and develop the appropriate capabilities.

Photo: Lara McKinley/OxfamAUS.

4. Gender justice

Overall progress against the plan



Positioning for the future



What does it mean?

Our work in **Gender justice** has progressed well. Given that the issues of gender-based violence and women’s leadership remain critical to achieving gender justice, we propose a focus on ways of working rather than any changes in thematic focus. The establishment of the Gender Coordination Group has resulted in the development of organisation-wide standards on gender.

Photo: Abbie Traylor-Smith/Oxfam.

5. Active citizenship and accountability

Overall progress against the plan



Positioning for the future



What does it mean?

The concepts of **active citizenship and accountability** remain central to our thinking about change. The feedback loop from the people the aid system seeks to benefit is either broken or non-existent and there is a growing need to develop public concern to shift political agendas. We have been good at mobilising activists and initiating projects, but we need to improve how we provide ongoing support, to ensure changes in policy create changes in people’s lives.

Photo: Kelly Dent/OxfamAUS.

How are we going?

Organisational change goals

Progress on organisational change goals against the plan has been good or mostly on track. Our analysis of future positioning shows we need to focus on improving **accountability** and **living our values**. We also argue that the area of **cohesion** requires particular attention because as a “foundation” goal, it impacts the ability to achieve most other change goals (organisational and external).

1. Cohesion

Overall progress against the plan



Positioning for the future



What does it mean?

This review suggests that there is less cohesion in Australia. We need to define shared goals, work together across organisational boundaries, and resolve conflicts related to poor collaboration. Greater cohesion will also come through truly integrating field staff.

2. People

Overall progress against the plan



Positioning for the future



What does it mean?

We have extraordinarily high levels of staff engagement with the organisation’s purpose and mission, and people are proud to work for the agency. Recent years have seen great improvements in the performance of immediate managers and in recognising achievement. To maintain this commitment we need to invest in developing the next generation of leaders in the organisation and continue to provide meaningful work for staff and volunteers.

3. Accountability

Overall progress against the plan



Positioning for the future



What does it mean?

While we have developed a good track record in terms of transparency, we need to better understand where our primary accountabilities lie. We also need to define what accountability means on a personal level, across the organisation, and then improve our engagement with external stakeholders.

4. Innovation and flexibility

Overall progress against the plan



Positioning for the future



What does it mean?

Work has been focused on quality, learning and improving our ability to respond to changes in context. This review found that we could fairly be described as a “learning organisation”, strong in interactive and reflective learning. Improvements should be made, however, in developing a stronger “evidence-base” to help guide decision-making.

5. Money

Overall progress against the plan



Positioning for the future



What does it mean?

We have grown our total income from \$54.5 million in 2006–2007 to \$68.6 million in 2009–2010, despite the global financial crisis. We need to ensure that we drive growth, rather than growth driving us. As we grow and our needs evolve, we need to continue to keep an intelligent mix of funding to support what we want to do. Work to develop an agency-wide income strategy is in the pipeline and will need to be monitored and reviewed over the course of the next three years, including analysis of the emerging implications of growth in any one area of funding.

6. Constituency

Overall progress against the plan



Positioning for the future



What does it mean?

We have increased the number of individual donors to 177,696 and activist supporters to 146,782 as at June 2010. Our overall brand awareness has increased 10% from 2008. Oxfam members feel we could support them better to attract others to the cause. We need to better engage our external stakeholders, for example, by using the planned Oxfam “*food security in a resource-scarce world*” campaign to unify messaging to our full constituency, including those that give, take action and volunteer.

7. Living our values

Overall progress against the plan



Positioning for the future



What does it mean?

Living our values is also an area that affects all other change goals. Progress has been made in terms of developing plans and coordination groups in key areas of reconciliation (in relation to Aboriginal and Torres Strait Islander People), environmental sustainability and gender equality. The challenge that lies ahead is to create change in practice through these plans and groups.

Key issues to address

When we look at how we are going and how we are positioned for the future, some common themes and issues emerge. Addressing the following issues will have a positive impact across all areas.

1. Clarifying what success looks like

While there is a shared understanding of what we are trying to achieve in terms of our mission and external change goals, there is much less clarity and understanding of progress, ways of working and how different parts of the agency contribute to overall performance. The challenges of cross-cultural communication and distance management make this harder.

2. Improving our ability to work across the organisation

Differences across the agency can become a source of frustration and division instead of being a rich source of learning about how different approaches might combine to produce something great. A better understanding of who we are ultimately accountable to, both personally and as an organisation, can assist in resolving some differences.

3. Making clearer links between external and organisational change goals

Progress in areas such as economic justice and gender justice, essential services and rights in crisis depend on the way we are developing and behaving as individuals, teams and as an organisation. The organisational change goals need to be understood, and reviewed in light of the degree to which they are enabling us to progress towards our external change goals.

4. Being the change we want to see

If there is too much of a gap between what we ask of others and how we behave, then we lack the credibility we require. We need to enhance the ability of managers to provide strong strategic leadership and decision-making in the face of growing uncertainty, and be role models for working collaboratively.

5. Engaging and communicating more effectively with our stakeholders

In the future we will need to engage with new, unlikely and diverse partners to tackle the problems we are faced with. This will require a coordinated, innovative and intelligent approach to stakeholder engagement and collaboration across teams and sections.

6. Addressing change overload

A recurring theme throughout this review is change overload. Many report that we are better at beginning new things than we are at finishing them off. This review must not create a series of new change processes or additional priorities. We need to remain focused, yet strengthen our ways of working so that we are able to adjust to a changing world.



Liquica, Timor-Leste. Children from families who are members of the Haburas Sare cooperative help to plant rice. Photo: Tom Greenwood/OxfamAUS.

What should we focus on?

Addressing the issues raised will require balancing three mutually dependent things.

1. How we assess our progress and adapt as a result
2. How we behave
3. How we relate to our stakeholders

We suggest six possible “acupuncture points” as triggers that are likely to produce what is needed to address our positioning for the rest of the plan period.

Key triggers for change

1. Fostering an integrated approach

Use the **2011–2013 Oxfam International economic justice campaign** with its theme of “*food justice in a resource constrained world*” to drive aligned and integrated approaches across the agency and in our engagement with external stakeholders.

2. An organisation-wide vision

Develop a clearer **organisation-wide vision** for our work in **rights in crisis**, which will clarify our ambition and propose ways to build our capacity across the organisation to manage humanitarian disasters.

3. Promoting effective leadership

Build the attributes and capacities necessary to lead and manage change in an uncertain world. This could be assisted by developing Oxfam Australia ethical standards or a “ways of working” agreement that gives more explicit guidance on how our organisational values translate into expected behaviours and ways of working.

4. Generating evidence-based learning and decision-making

Review our performance framework and develop more evidence-based processes for assessing external and organisational change goals and how they relate to each other. This should also involve clarifying **accountabilities**, recognising our commitment to being more accountable to those we seek to benefit.

5. Refining public identity

Contribute to the **Oxfam International global identity project** and use this as an opportunity to refine our public identity in Australia.

6. Achieving clarity on our growth trajectory

Develop a clearer agreement of the pace, location and nature of the organisation’s **growth trajectory**. This will also serve as a guide for work being done on our overall investments and budgeting, as well as the development of an organisational income strategy.

KwaZulu Natal, South Africa.
Grace Nomsebenzi Bewa (74 years old), provides for her children and grandchildren with support from Oxfam partner Woza Moya.

Grace farms over 12 sheep and has a vegetable garden that grows mainly corn and cabbages.
Photo: Matthew Willman/OxfamAUS.





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Photo: Timothy Allen/Oxfam.