



OXFAM AUSTRALIA
Aboriginal and Torres Strait Islander
Peoples' Program

STRAIGHT TALK VALUE FOR MONEY ASSESSMENT

Author Michelle Besley, Independent Consultant
July 2015

CONTENTS

ACRONYMS AND ABBREVIATIONS	4
EXECUTIVE SUMMARY	4
PROGRAM ASSESSMENT SUMMARY	6
FULL VALUE FOR MONEY ASSESSMENT	12
METHODOLOGICAL RATIONALE AND THEORETICAL UNDERPINNINGS OF THE OXFAM AUSTRALIA VALUE FOR MONEY ASSESSMENT TOOL	26

Melbourne, Australia: Former Straight Talk participants, Lefan Jard and Vonda Moar-Malone at the Oxfam offices in Melbourne. They are now members of our Steering Group for 2013 Straight Talk. Photo: Lara McKinley/OxfamAUS.



ACRONYMS AND ABBREVIATIONS

AACES	Australia Africa Community Engagement Scheme
ACRP	Australian Community Rehabilitation Program
BER	Basic efficiency resource
DFAT	Department of Foreign Affairs and Trade
MEL	Monitoring, Evaluation and Learning
MTR	Mid-term review
NGO	Non-government organisation
OGB	Oxfam Great Britain
SROI	Social Return on Investment
ToC	Theory of Change
VfM	Value for Money

EXECUTIVE SUMMARY

Oxfam Australia’s definition of Value for Money

Oxfam Australia defines Value for Money (VfM) as “the best use of resources to contribute to positive significant change in the most vulnerable people’s lives”. Significant change includes:

- consideration of scale (the number of people benefitting);
- depth (the intensity and sustainability of change); and
- inclusion (the change benefits people who are vulnerable and marginalised).

VfM has four core dimensions referred to as the four Es:

Economy	Costs and inputs — what went in? Reasonable cost to acquire good quality inputs that will enable realisation of the desired changes
Efficiency	Inputs to outputs — what happened? A measure of productivity; how much you get out in relation to what is put in (increasing output for a given input, or minimising input for a given output, with a regard for maintaining quality)
Effectiveness	Outputs to outcomes — what resulted? Is the program generating positive and sustainable outcomes?
Equity	Equal inclusion of vulnerable groups Is the program appropriately engaging and producing equal benefits for different groups?

Within the concept of VfM the four Es are interdependent, such that VfM cannot be determined in the absence of one or more of the four Es. Oxfam’s approach is weighted towards effectiveness (delivery of desired outcomes and sustained impacts) and equity (benefits are distributed fairly).

Development of a Value for Money assessment framework

Oxfam Australia sought to progress its understanding of VfM and how it can be practically applied within its programs. In 2015 it engaged Michelle Besley, an independent consultant, to work with three program teams to facilitate reflection on the VfM of their programs, and conduct three independent VfM assessments:

- **Oxfam in South Africa Australia Africa Community Engagement Scheme (AACES)** — capacity development support to partners component
- **Oxfam in Sri Lanka Australian Community Rehabilitation Program Phase 3 (ACRP3)** — institutional strengthening support to Community Based Organisation partners in Eastern Sri Lanka component
- **Oxfam Australia’s Aboriginal and Torres Strait Islander Peoples’ Program (ATSIPP) Straight Talk program** — whole of program

The VfM tool was developed iteratively as the assessments were undertaken by testing its application in different ways and in different contexts. Assessment was based on evidence obtained through traditional evaluation methods such as desktop reviews, stakeholder interviews and questionnaires. The process explored the use of different methods and ways to incorporate different stakeholder perspectives on the VfM of these programs. Some assessments used highly participatory methods, such as partner workshops whereby partners themselves rated Oxfam’s performance, and some assessments were conducted more remotely and informed by desktop review and staff focus group discussions.

The three VfM assessment processes were tailored according to the different contexts and needs of program teams. For the Oxfam in South Africa AACES and Oxfam Sri Lanka ACRP3 VfM assessments, formal assessments with ratings were undertaken. This was because these programs were nearing completion and there were internal and donor imperatives to formally assess VfM. The Aboriginal and Torres Strait Islander Peoples’ Program Straight Talk assessment was completed without ratings. This was because the process had a focus on learning and was carried out as the team wanted to get a sense of how the program was tracking on VfM and explore how VfM could be better incorporated into the program’s upcoming re-design.

Assessment is made against two sub-criteria within each of the four Es (eight sub-criteria in total). These criteria were developed through a consideration of how VfM can best be assessed in relation to Oxfam’s particular development approach and programming context. Each

of these sub-criteria are then aggregated to produce an overall VfM proposition. The assessment framework recognises that an assessment can only be made on the basis of evidence; it does not make an unsubstantiated judgement due to lack of evidence or penalise programs by rating VfM as poor due to a lack of data. Rather, the assessment notes the extent to which the judgement is well supported by evidence, or if a tentative judgement is made noting gaps in data. When insufficient information is available to enable an informed judgement to be made, this is stated. As with evaluation methodologies, the judgement is ultimately the subjective interpretation of the evaluator.

The approach recognises that Oxfam delivers programs in complex settings, and that context specific factors determine VfM options and considerations. For example, contextual factors may have implications for the different components such as costs of operating in specific countries and presence and capacity of other in-country actors that a program engages with. These factors may make it costlier or difficult to implement activities or achieve outcomes, or conversely make it more affordable and easier to implement programs and achieve outcomes. A program should therefore only be judged in relation to what it can feasibly and realistically achieve in light of these factors. The approach does not attempt to compare across contexts or programs; assessment is based on how well the program has been designed and delivered to bring about changes within its scope of control in light of the level of investment, the operating context and what alternative approaches may have been possible. Additional information on the theoretical underpinnings of the tool is provided on page 27.

VfM can be approached from a compliance and/or quality perspective. The process adopted sought to apply a VfM lens to see if this could enhance program quality and improvement. As such, the tool seeks to draw out learnings and recommendations related to the VfM of a program and how it can be improved. It also aims to strengthen the assessment of costs and investment, which is often lacking in program review, and help teams to better consider cost and investment options and make evidence-based VfM decisions. The process recognises that assessment of VfM can only be made if appropriate data across the four Es is available. The approach therefore uses VfM assessment as an opportunity to help teams strengthen their Monitoring, Evaluation and Learning (MEL) frameworks to collect particular information to inform on VfM in the future, and better manage for VfM.

PROGRAM ASSESSMENT SUMMARY

Program background

Straight Talk is an Oxfam Australia program managed by the Aboriginal and Torres Strait Islander Peoples’ Program. The program began in 2009, and has been implemented for the last seven years. It is funded through donor funds and Oxfam Australia unrestricted funding. It is a core program that will be re-designed in the coming months, and will continue to be implemented on an ongoing basis.

The program was established by Oxfam Australia’s Political Engagement Unit. It began as a four-day event called the National Summit, held every 18 months. This event supported Aboriginal and Torres Strait Islander women to travel to Canberra to visit parliament and meet with a range of female politicians (including representatives of all major political parties) and talk with them about the issues they face in their communities. It aimed to help

women learn about how the political system works and to form connections with female politicians.

The Straight Talk program then moved to a different unit and has subsequently been managed by the Oxfam Australia Aboriginal and Torres Strait Islander Peoples’ Program. Over the years, the Straight Talk program has evolved and adapted, introducing new activities. It currently remains an event-focused program and has expanded to include a range of regional events across Australia. The introduction of regional summits aimed to provide an opportunity for Aboriginal and Torres Strait Islander women to exchange ideas, knowledge and experiences with each other, work together to develop strategies to share information around common issues, and develop ideas that can be shaped into concrete positive outcomes for Aboriginal and Torres Strait Islander Peoples. The regional gatherings build on the National Summit, delivering workshops on a range of community and campaign-related skills specific to the local context in which they are delivered, providing an opportunity to go into detail about solutions, or innovative programs at a community level.

Straight Talk current program logic/Theory of Change

Broader social goal	<ul style="list-style-type: none">Aboriginal and Torres Strait Islander Peoples have the skills to challenge injustice through engaging with decision-makersAboriginal and Torres Strait Islander Peoples participate in decision-making that affects their communitiesAboriginal and Torres Strait Islander women demonstrate increased participation in decision-making and have increased access to positions of power
Program goal	<ul style="list-style-type: none">Aboriginal and Torres Strait Islander women use skills and relationships to effect change in the community
Intermediate outcomes	<ul style="list-style-type: none">Women share issues and work on them collectivelyImproved relationships between Aboriginal and Torres Strait Islander women and female politiciansAboriginal and Torres Strait Islander women build relationships with other Aboriginal and Torres Strait Islander women
Immediate outcomes	<ul style="list-style-type: none">Aboriginal and Torres Strait Islander women increase understanding of the political system and ability to work with politiciansFemale politicians increase awareness of issues relevant to Aboriginal and Torres Strait Islander women and their communitiesWomen connect and learn from each otherBuild on existing skills and learning tools for change
Activities/ strategies	<ul style="list-style-type: none">Using culturally appropriate facilitation and toolsProviding a safe space for women to come together to talk about political issuesUsing participant experience to improve the programOpenly and transparently engaging with the community in a culturally appropriate manner

The major activities of the program currently include a National Summit every 18 months and two regional gatherings each year. Straight Talk focuses on developing Aboriginal and Torres Strait Islander women’s skills to make positive changes through political engagement, while also increasing engagement in public and political life. The current program provides a platform for women to share stories and solutions together and form networks with each other and with women of Federal and State Parliament.

Value for Money assessment process

Oxfam Australia’s Straight Talk program was selected for this process, as the program team had commissioned a program impact evaluation and were also interested in applying a VfM analysis to the program. The assessment was conducted to support staff to see how the Straight Talk program was tracking in relation to VfM and how it could be enhanced. The process therefore had a focus on learning for improvement and did not intend to formally evaluate VfM. As a result, the Straight Talk assessment was completed without the rating system used in the other two assessments.

This VfM assessment was undertaken at the same time as the 2015 Straight Talk evaluation. It was completed before evaluation data was obtained and analysed. The assessment fed into the analysis undertaken as part of the wider evaluation. It is expected that the findings and recommendations presented in this assessment will feed into the upcoming Straight Talk re-design process.

This VfM assessment is drawn from information obtained through a desktop review and from discussions with program staff. Initially a desktop review was carried out of available program documentation in relation to the four Es. Based on this a “preliminary thinking on VfM” document was produced which analysed VfM in relation to the program’s Theory of Change. It considered how the Theory of Change had evolved and how resources had been weighted towards achieving different outcomes. The assessor then carried out a focus group discussion with the Aboriginal and Torres Strait Islander Peoples’ Program team to obtain their reflections on the document, clarifications and additional information regarding the Theory of Change and additional program context. Staff also provided additional information relating to program efficiency, which was a gap in existing program documentation.

No partners or program participants were engaged in this VfM assessment. This was because the VfM assessment was carried out concurrently to a participatory impact evaluation which strongly engaged women who had participated in the program. The assessment aimed to apply a VfM lens to support analysis of existing and new data collected through the evaluation, rather than

facilitate a participatory VfM assessment process.

Summary of key findings

The assessment found that as the Straight Talk program has evolved over time and been managed by different Oxfam Australia units, the investment had not been re-adjusted and appropriately aligned to adaptations to the program’s Theory of Change. The majority of the program’s investment has been directed towards the national and regional summit events. Insufficient investment has been directed towards post-event activities. It found that essential resourcing requirements which enable program staff to build and maintain relationships with Aboriginal and Torres Strait Islander women and provide effective follow-up support have been overlooked in the structuring and resourcing of the program.

The program’s Theory of Change has shifted as the program moved from Oxfam Australia’s Political Engagement Unit to the Aboriginal and Torres Strait Islander Peoples’ Program Unit. The program’s early driver was on skilling women to engage with Australia’s political system. The more recent focus has been on supporting women to be effective leaders and change agents through facilitating different layers of engagement, with knowledge and engagement of the political system becoming a core aspect of a wider program.

The program appears to have used the right resources (costs and inputs) to strengthen women’s understanding of the political process. This is evidenced by clear increases in women’s knowledge outlined through event evaluations. Events have also been appropriately re-designed in such a way as to produce a range of other outcomes that have emerged organically over the course of the program. Additional investment has more recently gone into bringing about other intermediate program outcomes (related to women connecting with others and working collectively on issues) with the introduction of regional workshops. Regional summit evaluation reports reveal that regional events are producing these intended outcomes, indicating an appropriate level of investment.

However, the program has not invested sufficiently in supporting women to use and apply their skills and relationships to effect change in their communities, which is the stated goal of the program. While program staff are working to support a smaller number of women (approximately 15–20%) on an ongoing basis, this aspect is not appropriately resourced. Staff are struggling to take the time required to maintain contact with participants and support women on an ongoing basis after they have attended the event by linking them with other organisations and programs or providing mentoring as requested by alumni.

The assessment highlights the importance of relationship building and trust between Oxfam Australia staff and Aboriginal and Torres Strait Islander women. The relationship Oxfam staff have with women impacts on how much women engage with the wider organisation and their opinion of Oxfam and the program. Oxfam staff noted the large amount of time this requires and that it has not been factored into staff roles, position descriptions or work planning. Furthermore, funding arrangements were found to have limited flexibility; as the funding is tied to the event, it is difficult to use funding for activities sitting outside of the event, constraining the program by not allowing it to seize opportunities.

Efforts have been made to ensure a diversity of women participate in the program, including youth and elders, and women from remote and rural communities. The assessment highlights opportunities to more strongly address equity considerations, and leverage internally and externally to achieve greater VfM as the program is redefined and expanded.

Key learnings

- **For inherited and ongoing programs with relatively stable funding, there may be no external pressures to trigger a revisiting of a program's Theory of Change** — while learning and adaptation may occur, there is value in revisiting the ToC to see if resources are appropriate and sufficient to activate the outcomes sought and ensure the stated outcomes are current.
- **The need to ensure resources are invested to bring about different outcomes and being clear when outcomes are expected to occur without dedicated resources** — resources have been directed towards bringing about immediate and intermediate outcomes. Until recently it appears limited resources have been directed towards bringing about the program goal or broader social goal. It is not clear if these are expected to flow on from lower level outcomes without resources and activities connected to them.
- **The need to manage and resource post-event engagement** — if Oxfam does not consistently maintain the foundation for communication with alumni (ie sending communications and updates) and engage consistently and genuinely, risks to the program may be created such as a decrease in applicants due to reputational loss.
- **Funding arrangements have limited flexibility** — as the funding is tied to the event, it is difficult to use funding for activities sitting outside of the event, constraining the program by not allowing it to seize opportunities.

- **The importance of building in time to be responsive** — program staff emphasised the importance of the program's ability to be agile to achieve impact. For example, if women identify opportunities and come to Oxfam for support, and Oxfam cannot help or connect them with others, the program's effectiveness and relevance will be limited. This factor should be articulated as an assumption underpinning the Theory of Change and factored into planning.
- **Two different types of participant groups have emerged** — the program is supporting two groups of women within the program: one group who are at the beginning of change process (and experience benefits though becoming more motivated), and the second, a smaller group who are already active and want to make more significant change.
- **Inefficiencies can be created if the delineation between program governance and management is not clear** and does not enable timely operational decision-making and delivery.
- **The importance of capturing unintended outcomes through Monitoring, Evaluation and Learning (MEL), and then structuring inputs to produce them** — additional unintended outcomes have been captured through program MEL and subsequently included in the Theory of Change. These include: women forming useful links; fostering feelings of empowerment (confidence and boost to act); fostering feelings of connection and unity; and supporting women to analyse and plan to advocate strategically.
- **Expectations of sustainability were not clear from the outset**, and were not examined and articulated as the program transitioned into the Aboriginal and Torres Strait Islander Peoples' Program and gained a stronger development focus.
- **Equity can be conceptualised in this context in terms of "targeting"** (ie giving different people the opportunity to learn about and to attend Straight Talk), and **creating an enabling environment** for different participants to ensure they can engage and participate equitably.
- **Program staff and members of the Steering Committee have different understandings of the extent to which the program should strive to ensure inclusion** — it is not clear if these issues have been navigated in relation to Oxfam Australia's policies.

Key recommendations

- **Clarify aspects of the Theory of Change and structuring of investment to bring about different outcomes** — including the relative importance of: raising awareness of parliamentarians; of Aboriginal and Torres Strait Islander women's subsequent use of the political system; of sustained connections between women and parliamentarians; and of helping some women to be more interested, motivated and confident in active citizenship.
- **Clarify investment in relation to reach and depth** — the program works with a large group of women during summit events, and a smaller group of alumni who seek follow-up support to move to a deeper level of active citizenship and leadership. The costs and inputs required to support these processes are significantly different. The program could explore different ways of directing and balancing investment in relation to these two groups to produce an optimal arrangement.
- **Map the kinds of requests for support received by women with other available programs (ie training and grant schemes)** — this will support the team to be better able to determine which partnerships to invest in and form links with.
- **Clarify how many participants can be supported post-events** — the program would benefit from mapping out the time taken to provide follow-up support to actively engaged women after an event, and provide an estimate of how many women can be supported by one role to a quality standard so that the program can develop a clearer idea of how many people it can realistically support well. It can then consider how to package and fundraise for the wider program to ensure other critical components are resourced.
- **Put clear parameters in place for follow-up support** — when working to provide responsive support to different alumni, the program is subject to a range of different requests and cannot do everything. Having a clear set of parameters to inform decision-making will help to streamline support.
- **Review and restructure staffing arrangements** — explore separating the two support roles with one person holding responsibility for logistics, and the other for strategic engagement and follow-up support to alumni.
- **Revise the function of the Steering Committee** — the program needs to be governed, managed and implemented in a timely, responsive and culturally appropriate manner; program staff need to be given the time required to perform their own roles.
- **Formally embed seizure of internal engagement opportunities into program planning and staff roles** such as exploring opportunities to link internally for research, evaluation and logistics.
- **Distinguish between ongoing engagement and sustainability** — considering sustainability in more detail will help the program to determine up to what point it should continue to provide follow-up support to alumni and when it should exit from individual relationships.
- **Map equity scenarios and factoring in equity costs** — the program could develop costings for targeting and including different groups of women in Straight Talk and explore how to balance these in relation to the number of women reached. For example, funding the inclusion of more participants with disability per year may mean less participants can attend an event in total, but this may be more appropriate as it supports inclusion (some inclusion costs may also be minimal and may not have implications for overall attendance numbers).
- **Develop a shared understanding of equity across program stakeholders** — when clarity is reached on how equity is to be incorporated into the program, a process should be put in place to ensure all program staff and governing members understand how they should contribute to program decision-making in a way that appropriately weighs up and responds to equity considerations.



Photo: James Henry/OxfamAUS

FULL VALUE FOR MONEY ASSESSMENT

Program information

Program type:	Active citizenship/women’s empowerment
Region:	Regional and national
Country:	Australia
Program period:	Annual program implemented since 2009 (6 years)
Program cost:	Annual average budget of AUD \$50,000
Stage in program cycle:	End of program (concurrent to a program evaluation)
Theory of Change in place:	The program did not have an original Theory of Change but it has been re-designed as part of the evaluation
Goal of program:	Aboriginal and Torres Strait Islander women use their skills and relationships to effect change in the community
Investment located (individual, community, NGO):	Individuals



Photo: James Henry/ Oxfam

COMPONENT 1: ECONOMY (Costs and inputs — what went in?)

Reasonable cost to acquire good quality inputs that will enable realisation of the desired changes.

Relevant contextual factors and implications for investment options

- The program was initially designed as an event by the Oxfam Australia Political Engagement Unit and has evolved into a more complex development program with multiple components since transitioning to the Aboriginal and Torres Strait Islander Peoples’ Program Unit.
- Many Aboriginal and Torres Strait Islander women reside in remote and rural communities, while Oxfam is based in Melbourne and the National Summit event is held in Canberra, creating domestic travel costs for face-to-face engagement.
- The program initially worked with Aboriginal and Torres Strait Islander women participants as the main “partner” of the program, yet it has more recently formed partnerships with other organisations.

ECONOMY SUB-CATEGORY 1: THEORY OF CHANGE (TOC)

ASSESSMENT QUESTIONS:

Has Oxfam invested in the “right” types of partners to achieve the change sought?

The program has worked directly with a range of Aboriginal and Torres Strait Islander women across the country. Working directly with women in this way allows Oxfam to direct the majority of its investment to women themselves, rather than to an intermediary, with Oxfam playing to its own strength and value-add of creating opportunities for others to come together, discuss, reflect and learn. While the approach aims to target women who are already taking action within their own communities, and women are clearly benefiting in a range of ways (as outlined in component 3), insufficient data collection and analysis has occurred to enable assessment as to whether the program is selecting the individuals best placed to make change.

The program has recently begun to trial new partnerships with other organisations to further support women’s change journeys outside of the summit events. This element of the program is currently at too early a stage to assess as part of this VfM assessment.

Has Oxfam used the “right” resources to support the changes sought? (Has it invested appropriately and sufficiently?)

The program’s ToC has shifted as the program moved from Oxfam Australia’s Political Engagement Unit to the Aboriginal and Torres Strait Islander Peoples’ Program Unit. The program’s early driver was on skilling

women to engage with Australia’s political system. The more recent focus has been on supporting women to be effective leaders and change agents through facilitating different layers of engagement, with knowledge and engagement of the political system becoming a core aspect of a wider program. The majority of the program’s investment has been directed towards supporting summit events. The program appears to have used the right resources (costs and inputs) to strengthen women’s understanding of the political process, evidenced by the clear increases in women’s knowledge outlined through event evaluations. The event has also been designed in such a way as to produce a range of other outcomes that support women (as outlined in component 3).

Additional investment has more recently gone into bringing about other intermediate program outcomes (related to women connecting with others and working collectively on issues) with the introduction of regional workshops. Regional summit evaluation reports reveal that regional events are producing these intended outcomes, indicating an appropriate level of investment.

The program does not appear to have invested sufficiently in supporting women to use and apply their skills and relationships to effect change in their communities, which is the stated goal of the program. While program staff are working to support a smaller number of women (approximately 15–20%) on an ongoing basis, this aspect is not appropriately resourced, with staff struggling to take the time required to maintain contact with participants and support women on an ongoing basis after they have attended the event.

LEARNING FOR IMPROVEMENT QUESTIONS:

Could the Theory of Change have been better constructed to ensure investment is appropriately aligned? What learnings does the program hold in this area?

- **For inherited and ongoing programs with relatively stable funding, there may be no external pressures to trigger a revisiting of a program's Theory of Change** — while learning and adaptation may occur, there is value in revisiting the ToC to see if resources are appropriate and sufficient to activate the outcomes sought and ensure the stated outcomes are current.
- **The need to ensure resources are invested to bring about different outcomes and being clear when outcomes are expected to occur without dedicated resources** — resources have been directed towards bringing about immediate and intermediate outcomes. Until recently it appears no resources have been directed towards bringing about the program goal or broader social goal. It is not clear if it was expected that these outcomes would naturally flow on from the lower level outcomes (without additional support) which appears unlikely, highlighting the need to ensure outcomes can be realistically achieved.
- **The importance of building in time to be responsive** — program staff emphasised the importance of the program's ability to be agile to achieve impact. For example, if women identify opportunities and come to Oxfam for support, and Oxfam cannot help or connect them with others, the program's effectiveness and relevance will be limited. This factor should be articulated as an assumption underpinning the Theory of Change and factored into planning.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How could resources be better directed to achieve the program's intended outcomes?

- **Clarify aspects of the Theory of Change and structuring of investment to bring about different outcomes** — including the relative importance of: raising awareness of parliamentarians; of Aboriginal and Torres Strait Islander women's subsequent use of the political system; of sustained connections between women and politicians; and of helping some women to be more interested, motivated and confident in active citizenship.

- **Clarify investment in relation to reach and depth** — the program works with a large group of women during summit events, and a smaller group of alumni who seek follow-up support to move to a deeper level of active citizenship and leadership. The costs and inputs required to support these processes are significantly different. The program could explore different ways of directing and balancing investment in relation to these two groups to produce an optimal arrangement.
- **Be cognisant of the different intervention aspects on investment** — summit events can be characterised as having "simple and complicated" aspects, as a group of women are participating in a single event which seeks to bring about relatively straightforward outcomes, meaning the context is more stable and predictable and investment can be more easily planned. Supporting women in their change journeys after the event can be characterised as having "chaotic" aspects, as Oxfam Australia is supporting a range of women, working to achieve different outcomes in different ways and within different contexts, meaning investment is more difficult to plan. Investment options within these categories should also be explored. For example, supporting a group of women over time to undertake collective action may be more valuable than supporting a range of individuals.
- **Map the kinds of requests for support received by women with other available programs (ie training and grant schemes)** — this will support the team to be better able to determine which partnerships to invest in and form links with.

ECONOMY SUB-CATEGORY 2: COMPETITIVENESS

ASSESSMENT QUESTIONS:

Have costs been kept reasonably low while maintaining quality? (Outline in relation to other comparable options available to implement the same activities OR the way in which the program has been implemented so reducing or increasing costs/inputs.)

The National Summit costs approximately AUD \$200,000 and approximately 60 women participate, resulting in a unit cost of AUD \$2,000 per person. Approximately 80% of National Summit event costs are used to cover participants' expenses during the summit, such as travel, accommodation and food. Other associated costs include:

- fees and expenses of facilitators, Steering Committee members, panel speakers, Oxfam Australia staff and people to perform the Welcome to Country;
- advertisement of the event; and
- printing of logos and T-shirts.

The National Straight Talk Summit 2013 Handover document outlines actions taken to navigate the recruitment of a photographer, videographer and political engagement contractor by weighing up issues related to competitive costing, available contractors and alignment with Aboriginal and Torres Strait Islander Peoples' Program values (ie supporting indigenous business). It appears that costs are reasonable and have been used to cover essential inputs.

The program has engaged Aboriginal and Torres Strait Islander facilitators through competitive tender processes. Facilitators have performed their roles appropriately and to high standards as validated through respondent feedback. Facilitators were engaged on a casual contracting basis which is appropriate. The program engages a lead facilitator at a daily rate of AUD \$1,500 per day, which is above the standard rates paid by Oxfam Australia for this type of work. It also engages group facilitators who are Straight Talk alumni and play a group mentor role. While these women are not professional facilitators and the program aims to provide these women with an opportunity to develop their skills in facilitation, they are paid a daily fee of AUD \$200, which represents a large discrepancy in allocation between the lead and group facilitators.

The program has been highly conscious of the need to create a culturally safe and respectful experiential learning environment for participants to share and learn. This focus appears to be the primary driver guiding program investment at all levels — operational, summit content and structure, and Monitoring, Evaluation and Learning). Regional workshops have been introduced to complement the National Summit event. This allows an increased number of women to learn about the political process (not necessarily to the same extent) using a lower cost model, with a unit cost per person of AUD \$1,500.

Have funding arrangements allowed costs and inputs to be used as necessary according to the program context?

The program is funded through contributions from donors (whereby funding is tied to the National Summit event) and through Oxfam Australia unrestricted

funding. This funding has enabled a relative stability of program planning and implementation, supporting a relatively large group of women to attend annually, and has covered all necessary associated costs of the event.

Funding has not enabled sufficient administrative or alumni follow-up support to be provided. Staff noted they have missed important opportunities to support women after the event due to lack of time. Staff also noted that the program lacks the dedicated resource functions for administration and knowledge management, resulting in databases not being well maintained.

LEARNING FOR IMPROVEMENT QUESTIONS:

What learnings are provided for managing and sourcing the funds required and ensuring the most economical use of funds?

- **Funding arrangements have limited flexibility** — as the funding is tied to the event, it is difficult to use funding for activities sitting outside of the event, constraining the program by not allowing it to seize opportunities.
- **Strong feedback processes have been instituted at the end of events** which has supported the design and delivery of events to adapt and strengthen over time and ensure appropriate use of funds to deliver the planned event-related outcomes.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How can funding arrangements and management of costs be improved?

- **Clarify how many participants can be supported** — the program would benefit from mapping out the time taken to provide follow-up support to actively engaged women after an event, and provide an estimate of how many women can be supported by one role to a quality standard so that the program can develop a clearer idea of how many people it can realistically support well. It can then consider how to package and fundraise for the wider program to ensure other critical components are resourced.
- **Prioritise investment and check in periodically** — providing a rationale for why the program is and is not investing in certain areas; vis-à-vis the program's Theory of Change would support planning and evaluation. The program would benefit from greater mining of financial data and from periodically checking that investment is balanced to meet

priority areas and support achievement of key outputs and outcomes.

- **Review facilitator rates** — assess the discrepancy between the lead and group facilitators. Ensure group facilitator rates are set appropriately and consider increasing these rates, particularly if alumni have played facilitator roles in several events and gained experience.

STRENGTH OF EVIDENCE

Poor evidence	Average evidence	Excellent evidence
Judgement made on best available data, not well supported by evidence.	Tentative judgement made on the balance of evidence, noting some gaps.	Informed judgement well supported by a range of quality evidence.

- List the primary sources of information used to inform the assessment:
 - Budget expenditure — Straight Talk program’s outgoing 2014–2015.
 - Program reports and evaluations.
 - Focus group discussion with program team members.
- List the strengths in the information and how they enabled assessment:
 - Detailed program expenditure.
- Note gaps in Monitoring, Evaluation and Learning (MEL) which made it difficult to make judgement, or what additional information would assist in making a more robust and nuanced assessment:
 - Percentage breakdown of costs of line items per year (ie MEL, participant costs, other associated event costs).
 - Breakdown of non-event related costs and inputs provided per year.

COMPONENT 2: EFFICIENCY
(Inputs to outputs — what happened?)

A measure of productivity — how much you get out in relation to what is put in (increasing output for a given input, or minimising input for a given output, with a regard for maintaining quality).

Relevant contextual factors and implications for efficiency

- Straight Talk is a program for indigenous people, run by a non-indigenous organisation — Oxfam Australia has had to set up atypical governance arrangements (a Straight Talk Steering Committee) to foster legitimacy and transparency.
- The program has been housed within two different Oxfam Australia units — the program was originally managed by the Political Engagement Unit and transferred to the Aboriginal and Torres Strait Islander Peoples’ Program Unit in 2013. As a result, program staffing positions were not designed in relation to the Aboriginal and Torres Strait Islander Peoples’ Program team structure but were retrofitted.

EFFICIENCY SUB-CATEGORY 1: PRODUCTIVITY

ASSESSMENT QUESTIONS:

Did the project bring about the outputs it had sought to?

OR

How do outputs compare to outputs produced by the same project in previous years OR similar projects?

OR

How has the project created efficiencies and inefficiencies?

The program has consistently and successfully supported Aboriginal and Torres Strait Islander women to attend the National Summit every 18 months. From 2012, it has facilitated two regional gatherings every 12 months. The program to date has reached over 550 Aboriginal and Torres Strait Islander women. The program has supported approximately 150 women each year to attend either a national or regional summit.

Event evaluations reveal that summits have been high quality, producing positive benefits for participants. There is clear evidence that ongoing adjustments have been made to summit events to enhance the quality of participants’ experiences. For example, more opportunities have been provided for women to: network and connect with other participants; share information about what is happening in other parts of Australia; and learn from experienced leaders through the Trailblazers component. Comprehensive event evaluations have been carried out each year which capture and analyse participants’ feedback

on their experience of logistical arrangements and operational support and appropriateness of content, program activities and program structure. However, documentation which outlines what adjustments have and have not been made in relation to feedback and rationale for decisions are not provided.

As outlined in the economy section above, the program is investing in areas outside of the national and regional summit events, supporting a smaller group of women on an ongoing and ad hoc basis. Inefficiencies are evident in the current staff arrangements whereby two roles share responsibility for event logistics and providing ongoing support to participants outside of events. These roles are significantly different and require different skill sets and relationships whereby the current structure creates overlap. The outputs sought by the program in relation to supporting women to make change after the event are not outlined in program documentation, making assessment in this area difficult. As the inputs required and deliverables for this follow-up support component have not been clearly articulated, inefficiencies are likely to be present as staff are struggling to respond.

The relationship between the Straight Talk Steering Committee and the Oxfam Australia program team responsible for managing and implementing the program has not supported efficient governance and management of the program. Oxfam program staff’s dependence on the Steering Committee for operational decisions has not given staff the level of responsibility required to make timely program decisions. Additionally, staff reported spending disproportional amounts of time managing and supporting the committee compared to performing other functions. While the nature of the program (non-indigenous organisation implementing an indigenous program) may indeed require additional

investment to establish a well-functioning governance structure, it appears that Oxfam has been unable to satisfactorily address this issue over the six years of the program, which has drained program resources.

LEARNING FOR IMPROVEMENT QUESTIONS:

What can be learned about trying to produce certain outputs in relation to the context and program type and the implications of this for investment?

- **The need to manage and resource post-event engagement** — if Oxfam does not consistently maintain the foundation for communication with alumni (ie sending communications and updates) and engage consistently and genuinely, risks to the program may be created such as a decrease in applicants due to reputational loss.
- **The importance of relationship building and trust** — a large amount of staff time goes into establishing and maintaining relationships with Aboriginal and Torres Strait Islander women. The relationship Oxfam staff have with the women reportedly impacts on how much women engage with the wider organisation and their opinion of Oxfam and the program. This also has implications for Oxfam’s promotion of the program. For example, if Oxfam requires a photo and story for International Women’s Day, it is not acceptable for staff to call a participant having had no other contact since the event. The perception would likely be that they feel Oxfam is using them, and cares only about the program and not the participants. If staff maintain ongoing relationships with participants they are then likely to be honoured, keen and proud to be involved in sharing their story and representing the program and organisation.
- **Inefficiencies can be created if the delineation between program governance and management is not clear** and does not enable timely operational decision-making and delivery.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How could Oxfam produce more or better outputs with a commensurate level of investment?

- **Review and restructure staffing arrangements** — explore separating the two support roles with one person holding responsibility for logistics, and the other providing strategic engagement and follow-up support to alumni.
- **Put clear parameters in place for follow-up support** — when working to provide responsive support to

different alumni, the program is subject to a range of different requests and cannot do everything. Having a clear set of parameters to inform decision-making will help to streamline support.

- **Revise the function of the Steering Committee** — the program needs to be governed, managed and implemented in a timely, responsive and culturally appropriate manner; program staff need to be given the time required to perform their own roles.
- **Provide a rationale for the optimal number of participants** — documenting how the program can accommodate 150 participants per year and why this number is optimal would demonstrate how the program is running at maximum efficiency.

EFFICIENCY SUB-CATEGORY 2: LEVERAGING

ASSESSMENT QUESTIONS:

How well has Oxfam strategically used and mobilised resources (ie the ideas, skills, funds and resources of other individuals/organisations, and its own skills, knowledge and networks)? Outline how it has leveraged and missed opportunities to leverage.

The approach taken during events is strength-based in that it supports women’s learning and empowerment by encouraging women to share their own experiences and listen to those of other women. In event evaluations, respondents consistently noted the value of learning from other participants. In this way, the program has leveraged the knowledge, skills and experience of participants, in addition to that of the experienced facilitators and speakers engaged.

The program has recently explored how it can partner with other stakeholders to enhance and extend the support options available to women who want to take further actions to effect change in their communities. It is currently piloting a partnership with a local council to help further the engagement of women alumni. The high political profile of Straight Talk is likely to encompass large potential to leverage. It has been acknowledged by staff that this has been a gap in the past, resulting in missed opportunities, and will be better integrated in the upcoming re-design process.

Until recently, the program has not effectively engaged other Oxfam Australia units such as the Research Unit, Program Performance Unit or the Political Engagement Unit, which could provide valuable input and support to the program. Internal engagement does not appear to have been well factored into planning and no staff role holds responsibility for fostering this engagement.

LEARNING FOR IMPROVEMENT QUESTIONS:

What can be learned about trying to leverage in relation to the context and program type?

- **The design of the program and focus on collective learning and sharing** between Aboriginal and Torres Strait Islander women has being essential to maximising program efficiency and effectiveness.
- **Straight Talk is a unique leadership program** — there are a number of leadership programs being implemented; Straight Talk is different as it has the political engagement event at its heart.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How can leveraging of internal Oxfam agency resources and external resources be enhanced?

- **Explore opportunities to engage alumni in other Oxfam programs** — the Straight Talk program is connected to a large number of alumni and due consideration has not been given to how Oxfam can strategically engage these alumni as part of Straight Talk and other Aboriginal and Torres Strait Islander Peoples’ Programs and Oxfam Australia programs.
- **Formally embed seizure of internal engagement opportunities into program planning and staff roles** such as exploring opportunities to link internally for research, evaluation and logistics.
- **Program to leverage Straight Talk’s niche and point of difference** — care must be taken to ensure the program’s unique political focus is retained so that it does not become “just another leadership program”; success could be enhanced by extending the program through connecting with others.

STRENGTH OF EVIDENCE

Poor evidence	Average evidence	Excellent evidence
Judgement made on best available data, not well supported by evidence.	Tentative judgement made on the balance of evidence, noting some gaps.	Informed judgement well supported by a range of quality evidence.

- List the primary sources of information used to inform the assessment:
 - Assessment of efficiency was largely based on a focus group discussion with staff regarding their experiences of managing and implementing the program. Information has not been validated or triangulated through other means such as data collection with other Oxfam teams or the Straight Talk Steering Committee.
 - All Straight Talk evaluations which detail participants’ experiences of the program were reviewed and have been drawn on for assessment of efficiency.
- List the strengths in the information and how they enabled assessment:
 - Comprehensive event evaluations made it relatively easy to assess the quality of the program by clearly documenting participants’ experiences of different aspects of the event.
- Note gaps in MEL which made it difficult to make judgement, or what additional information would assist in making a more robust and nuanced assessment:
 - There was relatively little analysis of efficiency in program documentation; only references to issues related to the Steering Committee were included.
 - A breakdown of the number of participants attending each year was not provided making it difficult to compare over time.
 - There was no documentation outlining what adjustments were/were not made in relation to participant feedback outlined in event evaluations and rationale for decisions.
 - Documentation outlining how the program has weighed up different options to use inputs to maximise the quality of experience for women and reach an optimal number of women with the resources available, would support the program to demonstrate its efficiency.
 - An outline of the deliverables that staff are expected to achieve in their support to women as part of the alumni follow-up component (ie approximate numbers and forms of support) to produce the related outcomes within the Theory of Change would support assessment.

COMPONENT 3: EFFECTIVENESS
(Inputs to outputs — what resulted?)

Is the program generating positive and sustainable outcomes?

Relevant contextual factors and implications for effectiveness

- The program was conceived by a different Oxfam Australia Unit — as a response to a political imperative, it was designed as an event rather than a program and did not have a strong focus on bringing about sustainable change.

EFFECTIVENESS SUB-CATEGORY 1: REACH AND DEPTH OF CHANGE

ASSESSMENT QUESTIONS:

Did the program bring about the outcomes it had sought to?

As stated in Component 1, the Theory of Change has adapted over the course of the program. The outcomes have also been revised and appear to have emerged organically from the program. For example, the program was found to be facilitating certain outcomes which were then articulated with the program seeking to strengthen and enhance these.

In terms of the current ToC, documentation reveals the program is consistently and successfully achieving the program’s immediate outcomes and intermediate outcomes, which relate to changes in the knowledge and skills of women and connections between them as a result of the event. However, it is not currently clear if (and to what extent) the program goal and broader social goal — which relate to women’s use of their new knowledge, skills and connections to effect change in their communities — are being met. The evaluation currently underway is expected to provide information to inform on the level and depth of outcomes supported by the program.

Did the program produce reasonable reach (numbers of people benefiting) and depth of change (systematic change) in relation to the level of investment?

There is currently not sufficient information to make this assessment. While it appears a large number of women have benefited from their engagement in the program (550 women), comparison to a similar program would enable a more robust assessment. Further information regarding the extent to which the program has supported women to make systemic change is required to make an assessment.

LEARNING FOR IMPROVEMENT QUESTIONS:

What lessons can be learned regarding the resourcing of critical pathways/strategies to support change in this program context?

- The importance of capturing unintended outcomes through Monitoring, Evaluation and Learning, and then structuring inputs to produce them** — additional unintended outcomes have been captured through program MEL and subsequently included in the Theory of Change. These include: women forming useful links; fostering feelings of empowerment (confidence and boost to act); fostering feelings of connection and unity; and supporting women to analyse and plan to advocate strategically.
- Change comes through the combination of program activities** — program staff assert that it is the combination of program variables (tools for learning, links created and stimulating environment) that creates women’s transformations.
- Two different types of participant groups have emerged** — the program is supporting two groups of women within the program: one group who are at the beginning of change process (and experience benefits though becoming more motivated), and the second, a smaller group who are already active and want to make more significant change.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

Could Oxfam have invested differently to enhance the quality, scale or depth of outcomes? Are there alternative ways in which the program could be implemented that Oxfam should explore (other models/strategies used by Oxfam or other agencies)?

- Clarify outcomes and expected reach and scale** — for example, by defining what percentage of women the program approximately expects to continue to engage with the political process, maintain

connections with parliamentarians and enter into politics, and by monitoring this to ensure an optimal use of resources to bring about the changes sought.

- Set clear and realistic objectives** — it was not clear if the program realistically expects 100% of women to make change in their communities afterwards. Both types of changes being brought about by the program (ie changes in personal confidence and motivation, and taking action to a deeper level) are important. To ensure these types of changes are valued and ensure the program is not expected to bring about unrealistic changes, Oxfam needs to be clearer on what it realistically expects to achieve to ensure it is not assessed unfairly.
- Increase the program team’s exposure to other leadership and active citizenship programs** —by giving staff the opportunity to research and learn about similar programs implemented by Oxfam or external agencies and explore ways in which to enhance aspects of the program.

EFFECTIVENESS SUB-CATEGORY 2: SUSTAINABILITY

ASSESSMENT QUESTIONS:

Are the outcomes sustainable, or is there evidence to indicate likely sustainability?

Assessment of sustainability of program outcomes cannot be made due to a lack of data in this area. While between 15–20% of women are following up and remaining engaged it cannot be assumed that other women (who do not have further contact with Oxfam) are not active. The program evaluation is expected to provide information in this area.

LEARNING FOR IMPROVEMENT QUESTIONS:

What can be learned about ensuring sustainability of program outcomes in relation to the context and program type?

- Expectations of sustainability were not clear from the outset**, and were not examined and articulated as the program transitioned into the Aboriginal and Torres Strait Islander Peoples’ Program and gained a stronger development focus.
- The outcomes and value of the program have not been clearly considered in relation to the investment** — it could be argued that the increases in women’s confidence and knowledge bought about by the program justify the investment, even if this does not translate into further action.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

What measures could have been taken to enhance sustainability and would this require additional investment?

- Outline expectations regarding sustainability** — it is not clear which aspects of the program are expected to be sustainable. Articulating this more clearly in the re-design will assist in defining the inputs required to support sustainability and its assessment.
- Distinguish between ongoing engagement and sustainability** — considering sustainability in more detail will help the program to determine up to what point it should continue to provide follow-up support to alumni and when it should exit from individual relationships.

STRENGTH OF EVIDENCE

Poor evidence	Average evidence	Excellent evidence
Judgement made on best available data, not well supported by evidence.	Tentative judgement made on the balance of evidence, noting some gaps.	Informed judgement well supported by a range of quality evidence.

- List the primary sources of information used to inform the assessment:
 - Evaluation reports
- List the strengths in the information and how they enabled assessment:
 - Evaluation reports captured a range of intended and unintended outcomes, making it possible to capture a fuller range of outcomes.
- Note gaps in MEL which made it difficult to make judgement, or what additional information would assist in making a more robust and nuanced assessment:
 - Outcomes are not clearly defined at different levels from the outset, particularly in terms of depth and reach. For example, it is not clear to what extent women are expected to use the political system for the program to be successful. If the program aims to achieve only the immediate and intermediate outcomes (ie gain new knowledge and connections) but not



necessarily use these, the program should state this (and ensure the logic is realistic).

- There is a lack of monitoring of outcomes relating to participants' experiences and use of knowledge, skills and links after the event (some anecdotal stories are provided).
- There is little information provided on how women are making changes in their communities, making it difficult to see what changes Oxfam is/is not contributing to.
- MEL data does not capture the extent to which specific program activities have helped women to bring about change after the event.
- There is little information with outlines the challenges women experience when trying to make change in their communities, which would better enable assessment of the appropriateness of Oxfam's support.
- There is no MEL data on the outcomes experienced by parliamentarians who participate in Straight Talk (noting this is a difficult stakeholder group to engage in MEL).

COMPONENT 4: EQUITY

(Equal inclusion of vulnerable groups)

Is the program appropriately engaging and producing equal benefits for different groups?

Relevant contextual factors and implications for equity

- The program works exclusively with women participants — as women are more often primary caregivers, many participants are responsible for children, which may constrain their ability to travel unless adjustments are made.
- Oxfam Australia does not have a presence in the communities in which the majority of women are located, making it difficult for staff to network and promote the program directly to vulnerable women.

EQUITY SUB-CATEGORY 1: EQUITY OF PROCESS

ASSESSMENT QUESTIONS:

How well is the program appropriately targeting and ensuring the participation of vulnerable groups? (ie women, men, children and people with disability)

The program has exclusively engaged women as program participants. Within its program selection, Oxfam has established selection criteria to ensure a diversity of women participants, including: remote, regional and city based women; women of different ages; and women from different sectoral backgrounds. The event is advertised on: the Straight Talk website; through email (previous Straight Talk alumni and Aboriginal and Torres Strait Islander Peoples' Program networks); Straight Talk and Change Course Facebook pages; and through newspapers (the Koori Mail, National Indigenous Times and Torres News). To support accessibility (particularly for those residing in remote areas) applicants have the option to return forms by email, fax or post. The option of completing applications via phone is also given, however not often utilised. This process has resulted in a diversity of women submitting applications.

The program's selection process does not actively seek to target and engage particular women, including women who are not literate and people with disability. On the application form, women are asked to identify if they have any support requirements, though staff noted this is commonly left blank. Staff noted that a woman with a hearing impairment was supported to attend a National Summit, whereby Oxfam funded a sign language interpreter to support her inclusion.

The program is conscious of the need to ensure equitable engagement of women with young children. Women have not brought children to Straight Talk events (due to a decision by the Steering Committee). The introduction of regional events was in part an attempt to reach and include women who were unable to travel to the National Summit event. The program is considering hiring a day-care centre during regional events in response to requests made by some participants. However, to date they have been unable to do this due to a lack of funding restrictions and the decision of the Steering Committee. The program has demonstrated flexibility for women who have had to withdraw from attending the National Summit event due to family commitments, by allowing them to reserve their place until the following year.

While the Steering Committee has given opportunity for some women to play a direct role in governance, there is perhaps opportunity to rotate this membership and give other women the opportunity to play leadership and governance roles in the program.

LEARNING FOR IMPROVEMENT QUESTIONS:

What can be learned about supporting equity in relation to the context and program type?

- **Equity can be conceptualised in this context in terms of "targeting"** (ie giving different people the opportunity to learn about and to attend Straight Talk) and **creating an enabling environment** for different participants to ensure they can engage and participate equitably.
- **Program staff and members of the Steering Committee have different understandings of the extent to which the program should strive to ensure inclusion;** it is not clear if these issues have been navigated in relation to Oxfam Australia's policies.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How could equity be more strongly integrated into the Theory of Change, the design and implementation of the program? What resource implications would this have?

- **Unpack gender** — articulate the rationale for working exclusively with women and consider if and how the program could be expanded to work with men as the program grows.
- **Clarify which women the program is targeting and why** — the current forms of targeting (through internet and newspaper) are likely to attract women from a higher socio-economic background. The program’s approach and investment with regards to equity needs to be more clearly considered and defined. For example:
 - a) Does the program aim to facilitate equal inclusion, guided by the premise that all women should have equal opportunity to increase their understanding and ability to engage? In this instance, design would focus on how to reach an equal cross-section of community. Inclusive strategies and investment would be directed towards targeting particular groups rather than only responding to expressions of interest/ requests. OR;
 - b) Does the program aim to reach women who are the best placed and most likely to lead change in their communities, guided by the premise that engagement is more valuable if it leads to action? In this instance strategies and investment would be targeted towards reaching the most receptive and active individuals.
- **Map equity scenarios and factoring in equity costs** — the program could develop costings for targeting and including different groups of women in Straight Talk and explore how to balance these in relation to the number of women reached. For example, funding the inclusion of more participants with disability per year may mean less participants can attend an event in total, but this may be more appropriate as it supports inclusion (some inclusion costs may also be minimal and may not have implications for overall attendance numbers).
- **Develop a shared understanding of equity across program stakeholders** — when clarity is reached on how equity is to be incorporated into the program, a process should be put in place to ensure all program staff and governing members understand how they should contribute to program decision-making in a

way that appropriately weighs up and responds to equity considerations.

- **Support equity of women’s participation in governance** — consideration should be given to ensuring different women have opportunity to participate in the Steering Committee and other roles in the program (ie session facilitation).

EQUITY SUB-CATEGORY 2: EQUITY OF OUTCOMES

ASSESSMENT QUESTIONS:

How equitably have different groups benefited? Has supporting inclusion had cost implications?

The 2014 Straight Talk report provides a snapshot of demographic breakdowns of participants. The event benefited Aboriginal and Torres Strait Islander women from over 40 different language groups. 34% of women were from major cities and there was an equal 22% split of the locations of other participants (remote, outer regional and inner regional). This indicates that the majority of participants that benefited were from remote and regional Australia (66%). Participants were selected from each state, with most participants residing in Queensland (36%), New South Wales (26%) and Western Australia (15%), with between 5–8% of participants residing in Victoria, South Australia and the Australia Capital Territory, and the smallest amount of participants coming from Tasmania (4%).

In terms of age demographics, youth (ages 18–25) made up 12% of participants, women aged between 26–54 made up 25%, and women aged 55 and over made up 14% of participants. This indicates that the program is making efforts to obtain a balance of youth and elders. The majority of women had completed university or Tafe and secondary college, with only a very small number of women having only completed primary school, indicating the program is largely benefiting more educated women.

Program MEL does not reveal which women (within these categories) are benefiting the most from the Straight Talk program. Some of this information will be captured and analysed during the 2015 program evaluation.

LEARNING FOR IMPROVEMENT QUESTIONS:

What learnings does this hold for ensuring different groups benefit equally?

- **The need to consciously manage biases of event structure** — it is not clear if the content, format and structure of the program supports some participants to learn more effectively than others. For example, are less educated women able to derive the same benefits as other participants?
- **There is a lack of clarity on the lack of inclusion of less educated women** — it is not clear if less educated women are not being selected due to an unconscious lack of targeting, or if they are not being targeted purposefully (as the program seeks to engage more educated women), or if it is because it is seen as a less important selection criterion (ie age and location are given preference during selection).
- **There is a lack of analysis of equity within benefits** — while demographic breakdowns are provided in reports, there is little analysis of these statistics, such as why some groups are included more than others and how the program has been designed and delivered to manage issues related to different groups. Only one report provided some information relating to this, noting that the National Summit event schedule was too full and tiring for older people. Such documentation would better demonstrate how the program is integrating and managing equity considerations.

RECOMMENDATION QUESTIONS (CURRENT/FUTURE PROGRAM):

How could groups benefit more equitably?

- **Actively target and select hard to reach groups such as people with disability and less educated women** — this would enhance equitable participation.
- **Provide greater analysis of who is benefiting and who may be being excluded** in reports to ensure equity is continually being assessed and enhanced.

STRENGTH OF EVIDENCE

Poor evidence	Average evidence	Excellent evidence
Judgement made on best available data, not well supported by evidence.	Tentative judgement made on the balance of evidence, noting some gaps.	Informed judgement well supported by a range of quality evidence.

- List the primary sources of information used to inform the assessment:
 - Project documentation outlining selection criteria
 - 2015 Straight Talk Evaluation
 - Focus group discussion with Aboriginal and Torres Strait Islander Peoples’ Program staff
- List the strengths in the information and how they enabled assessment:
 - Evaluations provided a comprehensive breakdown of participant demographics, making analysis of the inclusion of different groups within attendance possible.
- Note gaps in MEL which made it difficult to make judgement, or what additional information would assist in making a more robust and nuanced assessment:
 - A clear rationale describing how the program aims to navigate equity issues, including who is being targeted for selection and the inclusion strategies put in place during program delivery, would support assessment of the appropriateness and effectiveness of approaches.
 - A breakdown of the number of participants with disability participating in the program.

METHODOLOGICAL RATIONALE AND THEORETICAL UNDERPINNINGS OF THE OXFAM AUSTRALIA VALUE FOR MONEY ASSESSMENT TOOL



Canberra, Australia: Carla McGrath, Straight
Talk 2011 participant in front of Parliament House.
Photo: Anna Zhu/OxfamAUS.

Purpose

This document outlines the theory behind the VfM assessment tool used to assess the Oxfam Australia Straight Talk program. It aims to orientate the reader as to why the particular approach has been taken and why certain elements have been included. The assessment framework draws on a range of VfM research and analysis that has taken place over the last 10 years. This document provides an outline of what the VfM tool does and does not aim to do and why, with reference to this literature.

The approach

The approach takes Oxfam's definition of VfM — "the best use of resources to contribute to positive significant change in the most vulnerable people's lives"¹ as the starting point for the tool. It aims to articulate the links between resources invested and outputs and outcomes achieved (with reference to the four Es: Economy, Efficiency, Effectiveness and Equity) and examine if and how Oxfam could achieve greater change given the level and type of investment and operating context.

The approach recognises that Oxfam delivers rights-based programs in complex settings, and that assessment of VfM must recognise the context specific factors that determine VfM options and considerations. It draws on Bond's proposition that one way of approaching VfM is for NGOs to "build a robust and defensible case for how an intervention balances economy, efficiency and effectiveness and delivers the most value for poor and marginalised people."² Oxfam sees VfM as integrated throughout the program management cycle, and believes that if these processes are followed, its projects will deliver VfM. The tool provides a practical way to assess initiatives to see if this holds true and consider how VfM can be enhanced. It seeks to progress Oxfam Great Britain (OGB)'s finding of needing to "find ways to demonstrate VfM that are more than good management but may not go as far as monetary measurement of impact."³

Defining the "Value" in VfM

The approach does not aim to assign value in the way approaches such as Social Return on Investment (SROI) do, using proxy indicators to come up with an overall value proposition. This focus does not systematically answer the fundamental VfM question: "could the use

of resources be improved?" The approach does not seek to determine or rate the value of the changes made and ask the question "was it worth it in relation to the investment put in?" as some other approaches do. This is because Oxfam has not taken this approach and there are competing interpretations of what value is, or should be, and who ought to define it⁴ and because value takes time to deliver, especially at scale⁵, and may only be realised after the program has been completed. In addition, Oxfam works to progress human rights enshrined in national and international conventions (which arguably must be progressed regardless of their perceived value). Oxfam recognises that pathways to achieving rights are non-linear, context specific and must be strengthened through the application of strong Monitoring, Evaluation and Learning (MEL), and has therefore focused on better understanding and improving its change pathways with a VfM lens.

Placing Theory of Change at the heart of VfM

The central role of Theory of Change (ToC) in VfM is being increasingly acknowledged as development agencies seek to apply VfM concepts at a programmatic level. London School of Economics (LSE) research conducted in relation to VfM approaches and debates notes that "many stakeholders mention a Theory of Change as it reveals the organisation's understanding of value, illustrated through their rationale connecting inputs, outputs, outcomes and impact."⁶ Findings of an OGB evaluation that included a VfM assessment highlighted the importance of focusing on ToC to advance VfM. It states, "by carefully identifying the point at which success is measured (between activity and impact), and carefully tracking the types of interconnected inputs into the activities which contributed to such change, the assessment of value for money — and program quality itself — can gradually be strengthened."⁷ The assessment tool takes this suggested approach forward, using ToC to locate these elements, examining VfM in relation to the change processes Oxfam and its partners contribute to. As highlighted by Oxfam, this is important to ensure that "the value is not considered in the achievement of an activity, but in the occurrence of change, progress towards the outcomes and final vision as expressed in the Theory of Change."⁸

1 Value for Money Discussion Paper, Oxfam Australia, Program Quality Unit, Sept 2013, Page 1.

2 Bond for International Development, 2012, Integrating value for money into the programme cycle

3 OGB VfM training slide pack, June 2013, Page 78.

4 LSE, Value for Money: Current Approaches and Evolving Debates, 2011, Page 3.

5 OGB VfM training slide pack, June 2013, Page 64.

6 Women's Right to Be Heard: An evaluation of Oxfam GB's "Raising Her Voice" portfolio, June 2013, Page 59.

7 LSE, Value for Money: Current Approaches and Evolving Debates, May 2011 Page 3.

8 Women's Right to Be Heard: An evaluation of Oxfam GB's "Raising Her Voice" portfolio, June 2013, Page 58.

Using ToC is also important to ensure VfM assessment is strongly located in the programming context and is not reductionist and disconnected from context, which very much influences level of cost and investment required to achieve specific changes. As highlighted through the OGB evaluation, “the monitoring of value for money needs to be able to link outcomes to inputs and those to financial resources. It is important to build in ways to relate these elements together without losing the complexity and nuance of how change happens.”⁹

Comparison as a means of assessment

“An intervention can only be VfM compared to a different option, not by itself” ¹⁰; “Nothing is good or bad, except in comparison to something else.” ¹¹ While the need to build comparison into VfM assessment is acknowledged in the literature, challenges related to this undertaking such as determining comparable data sets, comparing programs that are implemented in different contexts, and finding available data to enable comparisons are also widely noted. The approach recognises that it is difficult to do this in any precise way, but aims to trial some comparative methods in a flexible way. As observed by a director of NGO performance, “we have to encourage comparisons. We’re going to lose some nuance — that’s OK. We cannot make decisions without losing some nuance.”¹²

The tool aims to document the costs and inputs in relation to the different strategies/activities used to effect change in different thematic and sectoral programs. It also aims to document the contextual factors that affect VfM considerations to support comparison. In time, this may support Oxfam to compare across its own programs with similar desired outcomes. ¹³ The approach

to comparison draws on work undertaken by Oxfam Great Britain ¹⁴ which identifies three forms of comparison:

1.

Benchmarking measurement (comparing program achievements with similar achievements outside the program — external agencies)
1.

Trend measurement (which shows progress over time can demonstrate cumulative effect or show comparative improvement over time)
1.

Stand-alone measures (show what has been achieved within a reporting period and can be compared against the plan for that period). Those steering OGB’s work argue that programs often undertake comparison in relation to stand alone measures, but need to move towards external benchmarking. In the early stages of the VfM assessment process, the assessor tried to work with teams to identify available external comparators. However, in practice when undertaking the three assessments, this could not be achieved at this early stage of formal VfM assessment and trend measurement and stand-alone measures were used.

Leveraging as an indicator of VfM

The VfM framework explicitly integrates “leveraging” as defined by Oxfam International in a 2014 paper “Leverage: Reaching scale in our work”: “leverage is working strategically with others in a ‘clever’ way, in order to lever a bigger change than we could ever achieve on our own. It depends on developing a rich web of mutually beneficial relationships and alliances at country, regional and global level. Leverage emerges out of that connectivity.” ¹⁵ Leveraging is not new and is something Oxfam does widely throughout its programs. However, integrating leverage in a VfM assessment aims to help program teams to consider how they are and can more explicitly harness the networks, resources, ideas and assets of others to achieve goals more efficiently and effectively and create larger change — enhancing VfM. It also ensures an assessment of VfM includes what others bring to the change process, rather than explicitly focusing on Oxfam’s actions and resources. As highlighted in Oxfam International’s paper, “a leverage approach means we must systematically strengthen these networks at all levels. Leverage is about being far sighted as to what we want to achieve, clear sighted and strategic about who will do it and especially, astute about understanding what kind of actions will create the alliances and momentum we need in order to bring about the big changes we seek.” ¹⁶

Assessing scale and depth of change in VfM

Christian Aid has developed a considered and eloquent approach to VfM. Its approach is about achieving the best results it can with the money and resources it has. It defines “best” results as the scale (numbers of people benefiting), depth (intensity and sustainability of change) and inclusion (in other words, a change has greater impact if it benefits people who are more excluded and marginalised) ¹⁷. Oxfam shares this approach, and the VfM tool seeks to capture numbers reached, level/depth of change, and levels of equity within outcomes. While it is challenging to define and measure depth of change, the framework seeks to assess the extent to which changes in practice and structural/institutional changes brought about are expected to be sustained beyond the life of the program. Noting that impact can be difficult to measure and may not be realised until years later, the framework seeks to assess the strength of outcomes produced.

Participation of partners and community in assessment of VfM

A VfM assessment must importantly consider from whose perspective value is defined. This VfM assessment tool is based on evidence collected through participatory monitoring and evaluation processes. Community participation in this VfM assessment is encouraged through the methodology. There are different ways in which communities can be involved throughout the assessment and the approach aims to encourage teams to explore different ways of engaging stakeholders. This approach draws on DFAT’s approach to VfM, which incorporates ethics (transparency and accountability) into its definition of VfM ¹⁸.

Evidence-based VfM assessment

Assessment is based on evidence. This includes regular MEL data and program documentation, and additional data collected by the assessor in the event of gaps in available data in relation to any of the four Es. Assessment is based on evidence obtained through traditional evaluation methods such as desktop reviews, stakeholder interviews and questionnaires, and participatory reflection workshops. The approach recognises that a VfM assessment can only be made on the basis of evidence, and does not seek to facilitate a process whereby assessment makes an unsubstantiated judgement due to lack of evidence, or penalises projects by rating VfM as poor due to a lack of existing data. It is recognised that in some cases it may be difficult to make a judgement due to lack of data. As with many evaluation methodologies, the judgement is ultimately the subjective interpretation of the evaluator. The approach uses VfM assessment as an opportunity to help teams strengthen their MEL (and application of the wider program management cycle), and explore how they can better integrate VfM into their MEL frameworks, which is key to managing for VfM.

9

Women’s Right to Be Heard: An evaluation of Oxfam GB’s “Raising Her Voice” portfolio, June 2013, Page 13.

10

LSE, Value for Money: Current Approaches and Evolving Debates, 2011 Page 24. According to Nicholles “the objective of understanding VfM is to make decisions and these are usually between more than one thing. This is powerful and useful within an organisation, but not necessarily between organisations because often it is hard to compare like for like.”

11

OGB Page 3, Bond OGB VfM Discussion Paper BER, Clair Hutchins, Page 3.

12

LSE, Value for Money: Current Approaches and Evolving Debates, 2011 Page 25.

13

This approach is also supported by LSE research which states ‘discussions with interviewees, as well as the analysis of the methodological underpinnings of VfM, suggest that one purpose of VfM could be to compare interventions with the same desired outcome. As such, VfM would refer to a way of achieving the same outcomes with more efficient use of inputs’ (LSE Value for Money: Current Approaches and Evolving Debates, 2011, Page 26. Ideally its programs could be compared to external agencies, however this requires other organisations to document their models and associated investments and make these publically available. Concerns

14

have been raised regarding the competitive environment this approach would create and the ‘race to the bottom’. LSE Value for Money: Current Approaches and Evolving Debates, 2011, Page 26.

14

OGB VfM training slide pack, June 2013, Page 89.

15

Oxfam International “Leverage: Reaching scale in our work”, 2014, Page 1.

16

Oxfam International “Leverage: Reaching scale in our work”, 2014, Page 1.

17

Christian Aid, How Christian Aid Assesses Value for Money in its Programmes, July 2012, Page 1.

18

An Oxfam presentation 2012 states, “Ethics is described by AusAID as ‘gives attention to the way VfM assessment is conducted to ensure that the research or data collection is undertaken with permission of participants and in a way that is honest and understood by those involved.’”



Photo: James Henry/OxfamAUS

ABOUT OXFAM

One person in three in the world lives in poverty. Oxfam is determined to change that world by mobilising the power of people against poverty.

Around the globe, Oxfam works to find practical, innovative ways for people to lift themselves out of poverty and thrive. We save lives and help rebuild livelihoods when crisis strikes. And we campaign so that the voices of the poor influence the local and global decisions that affect them.

In all we do, Oxfam works with partner organisations and alongside vulnerable women and men to end the injustices that cause poverty.

© Oxfam Australia, August 2016

Oxfam Australia
132 Leicester Street, Carlton Victoria 3053 Australia
Tel + 61 3 9289 9444 | Fax +61 3 9347 1983
enquire@oxfam.org.au
www.oxfam.org.au

Author: Michelle Besley, Independent Consultant

Editor: Melissa Spurgin

Designer: Kate Bensen



OXFAM
Australia