

TRANSFORMING PARTNERSHIPS

A Learning Review of Oxfam Pilipinas' Strategic Partnership Model



OXFAM
Pilipinas

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About the cover:

The cover design is a stylized graphic representation derived from the collaborative workshop outputs featured in this publication. The visual composition reflects the interconnected ways of working, strategic partnerships, and innovation, symbolizing a collective effort toward resilience, gender justice and humanitarian action.

About the publication:

This publication presents a learning review of Oxfam Pilipinas' Strategic Partnership Model (SPM) that reflects on its experiences, challenges, and lessons from the past five years. It offers insights from Oxfam Pilipinas and its partners on the evolving dynamics of development partnerships, local leadership, and transformative collaboration. The review aims to inform and strengthen future strategic partnerships for impactful social change in the Philippines.

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LIST OF ACRONYMS



CSO	Civil Society Organization
DRF	Disaster Risk Financing
EJ	Economic Justice
GJ	Gender Justice
INGO	International Non-Government Organization
FGD	Focus Group Discussion
LGU	Local government unit
MELSA	Monitoring, Evaluation, Learning and Social Accountability
NEAR	Network for Empowered Aid Response
NGO	Non-Government Organization
RIC	Rights in Crisis
SPM	Strategic Partnership Model
UN	United Nations

CONTENTS

INTRODUCTION.....	5
CONVERSATION ON STRATEGIC PARTNERSHIPS - THE CONTEXT.....	6
Overview of development partnerships.....	6
Partnership debates and challenges.....	7
Oxfam Pilipinas partnership journey.....	8
CONVERSATION ON STRATEGIC PARTNERSHIPS - THE PROCESS.....	10
Objectives of the learning review process.....	10
General approach.....	10
Key learning areas and questions.....	10
Steps in the learning review process.....	11
Participants and partnership profiles.....	14
CONVERSATION ON STRATEGIC PARTNERSHIPS - INSIGHTS, LEARNING POINTS AND ACTION STEPS.....	16
Learning point 1 – Revisiting the multi-faceted foundations on which partnerships stand.....	16
Shared intent and aspirations, aligned objectives.....	16
Local leadership, power and identities.....	17
Shared language, vocabulary.....	18
Learning point 2 – Setting up partnerships, how do effective and appropriate partnerships start.....	20
Learning point 3 – Attributing results, promoting innovations.....	23
On humanitarian action.....	23
On resilience.....	23
On gender justice.....	24
Learning point 4 – Influencing the broader ecosystem, facing complex power dynamics and connecting different tribes.....	25
Influencing and learning from other development actors.....	25
Donor policies and practices.....	25
Learning point 5 – Nurturing partnerships, managing complex and complicated ways of working.....	26
Equitable partnerships, behaviors and attitudes.....	26
Other ways of working issues.....	28
<i>Inter-portfolio collaboration</i>	28
<i>Capturing and communicating results</i>	28
<i>Resources</i>	31
CONCLUSION.....	32
ANNEXES.....	34
Annex 1 – Background to the learning review.....	35
Annex 2 – Systematization approach – overview.....	39
Annex 3 – Highlights of SPM assessment documents.....	41
Annex 4 – Inception report.....	45
Annex 5 – Summary of online survey results, RIC FGD.....	51

INTRODUCTION

Collaboration with other development actors, encompassing diverse forms and modalities of partnerships, has been an integral element of Oxfam's history. In the Philippines, Oxfam has a longstanding tradition of collaborating with a wide range of stakeholders, including government agencies, civil society groups and corporate private sector entities. These collaborative initiatives and partnerships have contributed significantly to the achievement of Oxfam's objectives of alleviating poverty and reducing inequality.

In 2017, Oxfam in the Philippines launched its Strategic Partnership Model, which codified their experiences in development partnerships. Oxfam has regularly assessed the model since then, recognising the evolving nature and continuing challenges inherent in partnerships and collaborative work.

In late 2022, Oxfam Pilipinas has decided to undertake a learning review of the partnership model to take stock of their experiences over the last five years and identify lessons and areas for improvement.

However, the experience in the last five years needed to be framed vis-a-vis the longer narrative of Oxfam's history of partnerships in the Philippines, along with relevant changes in the broader development and humanitarian landscape as well as organizational transformations of Oxfam and individual partners.

The learning review took place against the backdrop of ongoing discussions and debates about partnerships around the world. These discussions highlighted key matters such as the importance of local leadership in humanitarian and development work, the need to shift power and resources to local actors, more accountability in development work, decolonization of aid, addressing racism in the development sector and reimagining the role of international NGOs.

Many of the issues, lessons and insights discussed during the learning review were not new. However, these topics require revisiting, especially given that new individuals are now participating in these relationships. They will need to construct their own narratives of partnerships, explore innovative ways of working, and even re-evaluate and challenge existing assumptions about partnership policy and practice. There have been changes and variances in the participation, experience and level of engagement of both organizations and individuals in these partnerships as well as in the learning review process itself.

It is equally important to acknowledge the impact of the Covid-19 pandemic on the practice of partnerships during the period under review.

It is our aim to ensure that the valuable voices of the participants in the learning review process - staff of both Oxfam Pilipinas and partners - come through and are given justice in this report. Given the wide range of issues on partnerships, the learning review participants decided to focus on the specific topics they deemed were relevant, urgent and aligned with their current needs.

Oxfam Pilipinas and its partners consider their current partnership to be in a good place. However, they all feel that this learning review is not the end of conversations and learning that need to be had with regards to the issue of partnerships. Learning is ongoing; learning requires time.

CONVERSATION ON STRATEGIC PARTNERSHIP – THE CONTEXT

Overview of development partnerships

Partnerships in development and humanitarian work has been around some time. These partnerships encompassed formal development cooperation arrangements between governments and international organizations and collaborative efforts across various development stakeholders - government agencies, non-government organizations and corporate private sector entities. More recently, philanthropic donors have risen in prominence particularly in the climate change and just energy transition arenas. These partnerships covered various forms from top-down, donor-beneficiary arrangements to political solidarity-based cooperation.

Starting in the late 1980s, the development and humanitarian landscape underwent a significant change with the rise of neoliberalism, which advocated smaller government roles and a larger part for non-government organizations in the delivery of vital social services. This shift gave prominence to non-government and civil society organizations, including those with progressive and political orientations as well as non-government organizations in the global north.

This transformation also influenced changes in partnership terms and expectations between donors and their civil society partners. This shift was marked by the increased prominence of terms such as “good governance,” “aid effectiveness,” “capacity development” and “absorptive capacities,” all within the rubric of a strongly managerialist approach to development.

Collaborative approaches, or partnerships, are currently a key feature in the development and humanitarian landscape.

Multi-stakeholder approaches and partnership have taken centre stage, with the thinking that collaboration among governments, businesses, non-government organizations and other stakeholders are essential for addressing complex humanitarian and development challenges. Goal 17 of the Sustainable Development Goals sees the need for global partnerships for sustainable development. Many donors have increasingly resorted to “consortium” or “collaborative” modes to funding access or mobilization.

Technology has increasingly become a critical tool in promoting and sustaining partnerships. On the one hand, it has improved connectivity and communication, allowed for wider stakeholder engagement, expedited resource transfers and streamlined coordination efforts. Remote collaboration technologies have helped development and humanitarian organizations navigate many of the challenges posed by the Covid-19 pandemic. Digital technologies have also opened ways to monitor and evaluate partnerships, thereby enhancing transparency and accountability. On the other hand, technology has also enabled, intentionally or unintentionally, micromanagement across the development and humanitarian ecosystem.

In the best of times, partnerships in the development and humanitarian sector provide benefits arising from **collaborative advantage**, significantly enhancing effectiveness, efficiency and sustainability of development and humanitarian initiatives. These collaborative efforts promote the sharing and optimal use of scarce resources, development and sharing of expertise and capacities, and coordinated actions – including joint advocacies – towards achieving common goals, thus maximising impact and minimising redundant efforts. They harness unique insights and resources from diverse actors, especially those at the frontlines, for locally driven and locally owned development. Partnerships cultivate mutual trust, respect and dialog among participants and stakeholders, all of which are crucial for sustainable development.

Partnership debates and challenges

Over the years, changes in the broader political and economic context, including shifts in individual donor countries' foreign policies, geo-political and economic dynamics, have informed, shaped and challenged the understanding, policy and practice of partnerships in the development and humanitarian sector. Alternative voices and expectations from certain segments of the non-government, civil society and social movement community have also played a significant role in this evolution, if not in the persistent challenge to what some see as deeply entrenched mainstream policy and practice of development partnership.

Calls for authentic and inclusive partnerships underline the urgent need for transformation in the policy and practice of partnerships throughout the humanitarian and development landscape. These calls emphasise the importance of partnerships centred around local leadership, reform of the aid system, decolonization of aid and addressing racism within the development sector. They advocate a departure from top-down approaches where donors monopolise resources (funding, technical, knowledge) and dictate the agenda. They also identify other issues such as lack of trust, divergent objectives, insufficient transparency and accountability, burdensome procedures and a deficient approach to capacity assessments. These challenges highlight the considerable complexities involved in establishing, managing and nurturing genuine partnerships, even in collaboration amongst non-government and civil society organizations.

These efforts - involving organizations both from the global north and global south - simultaneously expose the continuing need for change as well as the **persistence of entrenched policies, practices and habits** despite several efforts aimed at system transformation.

In the early 2010s, CONCORD, the organization of European humanitarian and development NGOs¹, raised the importance of European NGOs rethinking their role in global development, advocating for solidarity, equality and a stronger connection with social movements as elements of their partnership with organizations in the global south. This rethinking is rooted in their realization of the need to reimagine their identity. Another effort in 2014, Doing Development Differently, advocated for locally led development.

In 2015, the Start Network, via its large program - the Disasters and Emergencies Program (DEPP) - attempted to address key aspects of humanitarian work using the prism of localization through several sub-components of the DEPP program such as locally led capacity development, shifting power to local humanitarian actors, exploring new funding modalities, among others.

In 2022, BOND, the British consortium of development and humanitarian non-government and civil society organizations, shared their own efforts to rethink their identity and identify possible **new roles** for them in international development partnerships, mentioning roles as interpreters, knowledge brokers, connectors, critical friends and sidekicks, among others.² A critical aspect of development partnerships is the ability to bridge knowledge gaps. This demands openness, co-learning and effective communication.

Localization was one of the key themes of the humanitarian summit and Grand Bargain of 2016, which subsequently led to the Charter for Change initiative. The Charter for Change, a commitment comprising eight points by international NGOs, was aimed at effecting transformation within the humanitarian system. Also launched at the same time was NEAR (Network for Empowered Aid Response), a network of local non-government organizations across the globe, working to transform the global aid agenda through shifting more power to local actors and organizations. Oxfam International developed its own local humanitarian leadership agenda and policy document in 2017.

¹ See Devex. NGOs need to rethink their role in global development – CONCORD chief. <https://youtu.be/C487FwYV-F4>

² See Bond (2022). The Future of International Development: A New Agenda for NGOs. London: BOND

Interestingly, in a series of regional consultations on the Grand Bargain localization work-stream from 2018-2019, which was attended by international organizations, Charter for Change signatories, NEAR members and other non-government organizations, one of the key issues is that there was still no substantively agreed definition or **shared language** of “localization” and “local leadership.”

More recently, initiatives have emerged aiming to enhance aspects of humanitarian work. These initiatives strongly advocate a shift towards locally driven development, local leadership and decolonization of aid. They stress the necessity for substantive engagement with marginalised and traditionally excluded groups, while increasing the focus on **accountability to communities of poor people**.

Development partnerships are likely to become more complex and diverse, reflecting the multi-faceted, complex and volatile nature of global changes and challenges in an increasingly interconnected and interdependent world. Development cooperation, collaboration and partnerships need to be **agile and adaptive**. At the core of inclusive and genuine partnership is the **question of power**—as long as people hold on to power-based behaviors, there will be challenges. However, embracing the idea of collaborative advantage—that **power shared is power gained**—can meaningfully transform traditional hierarchies and foster equality within the development sector.

Oxfam Pilipinas partnership journey

In 2017, Oxfam sought to systematise its partnership approach by introducing the Strategic Partnership Model (SPM). The SPM was constructed based on Oxfam’s extensive history of collaborative relationships with local development actors. As a summary document published by Oxfam in 1998 stated, “Oxfam worked alongside development actors, offering crucial project and program appraisal, monitoring and evaluation support. Owing to an in-country presence and a local staff, regarded as its most valuable resource, Oxfam’s partnerships were deeply rooted in an understanding and appreciation of the local context. These learning and capability-building partnerships, distinguished by focused support and the ability to learn from both shared and individual experiences, constituted Oxfam’s strengths.”³ Notably, out of approximately 150 partner organizations listed in the document, only three are currently still Oxfam partners. The document also highlighted Oxfam’s awareness of the need to extend their partnerships to include “non-traditional” partners such as government agencies and the private sector.

Through the years, Oxfam has indeed expanded its partnerships to include non-government organizations, local government entities, academic institutions and corporate private sector companies.

³ See Oxfam in the Philippines: 10 Years Involvement and Partnership, published by Oxfam in the Philippines in 1998



Figure 1: The Oxfam Strategic Partnership Model (2017)

Over the past five years, Oxfam in the Philippines has endeavoured to operationalise the model, regularly evaluate their experiences⁴ and effect some adjustments to the model. Concurrently, Oxfam has undergone significant transformations. It has developed a new country strategy, shifted towards a portfolio-based programming approach, and established mechanisms to manage the constraints posed by the Covid-19 pandemic. Perhaps most notably, Oxfam in the Philippines has transitioned from an Oxfam International program country to a fully-fledged affiliate of the Oxfam International confederation, changing its name to **Oxfam Pilipinas** and transitioning to a new **identity**.

As Oxfam Pilipinas' Strategic Partnership Model (SPM) marked its five-year anniversary in 2023, the organization proposed a comprehensive learning review of experiences and lessons learned. Interestingly, this review coincides with the publication of a number of similar country-level **partnership reviews and conversations**.⁵ These initiatives underscore the need to continually learn from and improve development partnership policies and practices of development actors, citing such issues as the need to challenge donor-driven behaviors, the importance and attendant difficulties to optimal collaboration, taking a long-term view of development and thus development partnerships, putting program/project participants at the heart of development initiatives and the need for greater accountability.

In a way, strategic partnerships can be seen as a **messy middle** between the high-level aspirations of inclusive and transformation development work, and the practical requirements of program/project management, accountability and acquittals.

⁴ See discussion in section

⁵ See for instance, Bainbridge, David. Making localization a reality: five takeaways from CBM Global's partners in Madagascar, 10 May 2023, <https://cbm-global.org/blog/five-takeaways-from-cbm-globals-partners-in-madagascar>, and van Wessel et al (2023). Reimagining Civil Society Collaborations in Development. New York: Routledge

CONVERSATION ON STRATEGIC PARTNERSHIP – THE PROCESS

Objectives of the learning review process⁶

The general objective of the proposed learning review was to assess how OP's strategic partnership model, with its various components, has contributed to more effective and impactful work on social transformation in the Philippines. The specific objectives included the following:

1. Examine the quality and resilience of relationships between OP and its partners
2. Determine how the strategic partnership contributed to the achievement of common outcomes and impact among partner communities and other social actors, including identification of relevant helping and hindering factors as well as adaptive and innovative measures taken by OP and its partners vis-à-vis the operating context
3. Understand how the strategic partnership model has contributed to systemic change and local leadership of development and humanitarian work in the Philippines
4. Identify and consolidate relevant lessons/learning from the experience re: strategic partnership model to underpin sustained conversation/discourse on partnerships between OP and its partners.

General approach

The SPM is a multifaceted framework. Thus, it was critical for the learning review process to accurately frame and focus the *problematique* in terms of their relevance to Oxfam and their strategic partners. It was clear from the beginning that the learning review must involve Oxfam Pilipinas' strategic partners in a substantive manner.

The learning review employed a participatory systematization approach, highlighting the dialogic nature of learning – especially given the focus on partnerships – to foster collective understanding of shared experiences, emphasising shared language, analyses and learning. The systematization approach is viewed as a mutual-learning conversation in a safe space and facilitating broader systemic discussions on reshaping the development landscape.

Methodological principles underpinning the study include creative methodologies, participatory and multi-stakeholder perspectives, complexity-aware and adaptive approaches, systems thinking, alignment with feminist principles, emphasis on values, identity and relationships, evidence-based conclusions, and adherence to informed consent and confidentiality. These principles contribute to a comprehensive understanding of the strategic partnership model within the broader ecosystem of organizations working on related themes and concerns at national and sub-national levels.

Key learning areas and questions

A systematization process involved the identification, documentation and communication of key lessons from an initiative (in this case, the Oxfam Pilipinas SPM) for quality improvement, strategic thinking, advocacy and influencing, scaling, accountability and systemic learning. This inclusive approach started by defining relevant learning areas and questions agreed upon by participants such as Oxfam Pilipinas and its strategic partners. The subsequent learning process was collaboratively developed, addressing both individual and organizational levels.

⁶ As confirmed by the review Reference Group, based on the initial Terms of Reference prepared by Oxfam Pilipinas.

The key learning areas and questions initially agreed between Oxfam and their strategic partners (via a reference group) include the following:

Local leadership and transformative partnerships

How can transformative partnerships address local ownership and empowerment while managing funding challenges? What role will Oxfam Pilipinas play in localization as an Oxfam affiliate, and how does this transformation in Oxfam identity impact partnership dynamics? What strategies can enhance collaboration and outcomes within these partnerships?

Partnership practices and ways of working

What are the key factors for realising sustainable, harmonized and adaptive systems and strategies for Oxfam Pilipinas and partners? How can capacity-building activities align with shared values and goals? How can interconnectedness of humanitarian, development and peace efforts be strengthened, and what are best practices for establishing, reviewing and maintaining partnerships that foster effective collaboration?

Learning from and influencing the broader ecosystem

How can Oxfam Pilipinas and partners effectively communicate SPM principles, capture and share good practices, and learn from others? How can inclusive partnerships, innovation and lessons from other experiences be fostered to enhance the partnership model? What strategies can grow and influence partnerships while adapting practices from other organizations and involving a wider range of stakeholders?

Influencing funding chain actors

How can Oxfam Pilipinas and partners maximise donor relations and networks to influence transformative donor agendas and practices? What mechanisms and strategies can be employed to sustain and strengthen donor networks, ensuring long-term support for transformative partnership initiatives?

Results and relationships

How can Oxfam Pilipinas and partners examine processes and narratives to better understand partnership dynamics and their impact on people's lives? What assumptions and motivations influence significant changes? How can challenges in fund management and accountability be balanced with partnership requirements to create mutually respectful and empowering collaborations?

Gender dimensions and feminist principles

How can Oxfam Pilipinas and partners better mainstream gender and feminist principles into partnership practices and influencing efforts? What strategies can be employed to ensure the integration of gender mainstreaming, funding and identity establishment in the efforts of Oxfam Pilipinas and partners? How can a gender-sensitive approach be applied and feminist principles be integrated in partnership practices and learning?

Steps in the learning review process

The learning review was designed as a dialog between Oxfam Pilipinas and their identified strategic partners, their voices heard and shared through the following key steps in the learning review process:

Review of Oxfam Pilipinas SPM assessment documents.⁷ From the launch of the Strategic Partnership Model in 2017, Oxfam Pilipinas (and at times with the involvement of some partners) conducted numerous evaluations and assessments of the SPM, both as a stand-alone subject and as it was embedded in various Oxfam thematic pillars and portfolios.

⁷ See highlights of the document review, Annex 3.

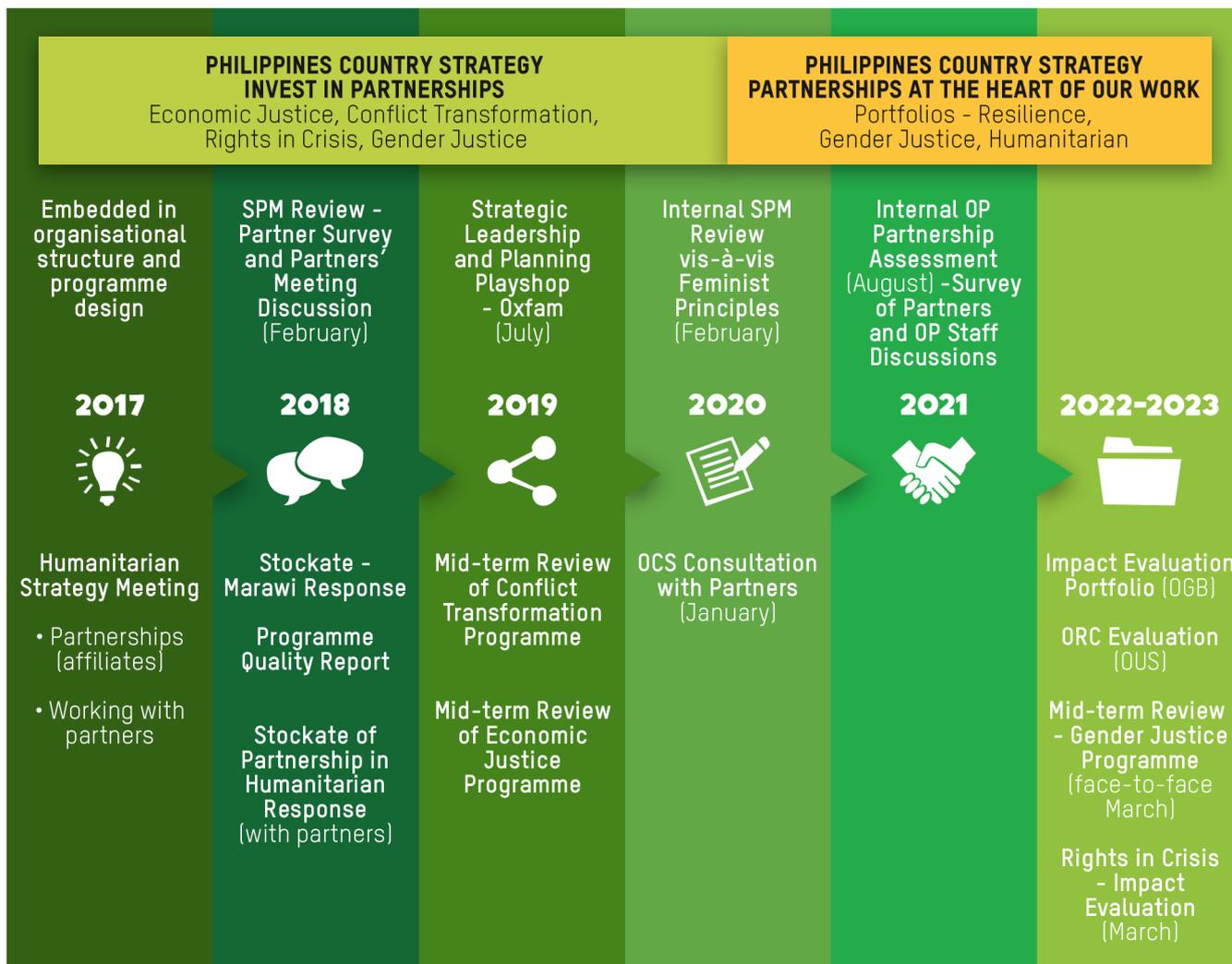


Figure 2: SPM rollout and review timeline (2017-2023)

The reviews highlighted Oxfam’s strong commitment to forming partnerships with local NGOs, communities and other development actors to develop empowering and sustainable solutions to poverty and inequality in the Philippines. Oxfam has been working to build partnerships across various themes, including conflict transformation, economic justice, gender justice and rights in crisis, which were the pillars in their 2015-2020 strategic plan, and translated into the resilience, gender justice and humanitarian portfolios in their 2020-2025 strategy.

Oxfam has recognised the advantages of working strategically with local partners and other local development actors, including maximization of partner networks, coordination with local governments, and humanitarian and development responses based on local needs and priorities. Oxfam partnerships were referred to as functional and layered, supportive of community organization and mobilization. At the same time, Oxfam has faced a number of challenges including engaging with unique cultural contexts, behavior and attitudes, funding and logistics, and the requirements of ensuring sustainable and durable solutions.

Engagement with other contemporaneous processes. The learning review process diligently addressed the issue of “consultation fatigue” among the intended participants. To avoid overwhelming participants with repeated or duplicated engagements, the review involved various potential participants and respondents in unique ways while still ensuring a broad source of information.

Rather than organising a separate internal session on the Strategic Partnership Model (SPM) review, the review was included in Oxfam Pilipinas’ year-end staff assessment in March 2023. During this engagement, Oxfam staff were introduced to the review design, consulted on key learning questions, and participated in preliminary discussions on suggestions and recommendations for improvement.

One element of the review was to examine the partnership model’s contribution to the outcomes of Oxfam Pilipinas thematic programs, pillars or portfolios. Instead of calling partners from the three portfolios to additional consultation sessions, the learning review integrated review questions into other ongoing review processes. However, this was only implemented for the “rights in crisis” review due to timing conflicts with other planned thematic reviews (gender justice and humanitarian action).

Online survey. An online survey was implemented in end-March to early April 2023. Three sets of online surveys—with common and distinct questions—were administered to three respondent groups. The first group was Oxfam Pilipinas staff, with the online survey serving as a follow-up to the face-to-face Oxfam Pilipinas yearend assessment meeting. The two other groups were gender justice and humanitarian action partners selected from the 50 identified strategic partners who were not attending the face-to-face meeting. The survey was intended to generate as diverse ideas as possible, especially since a majority of partners and Oxfam Pilipinas staff would not be participating in the face-to-face meeting. Those who were invited to the face-to-face meeting were excluded from the survey.

In the end, six out of 20 partners responded while seven out of 40 staff responded. The survey results were organised, documented and served as significant starting points for the face-to-face learning workshop.

Face-to-face learning workshop. This was considered the apex event in the systematization process and intended as a space for collaboration and conversation between Oxfam and partners, starting from making sense of the various information available to-date, i.e., review of OP documents and survey results (including feedback from the RIC impact evaluation FGD).

The face-to-face learning workshop was held on April 19-20, 2023 and was attended by representatives from OP and 11 strategic partners. The final participants to the face-to-face workshop included 10 representatives from strategic partners (five men and five women) and eight representatives from OP (two men and six women). Six of the OP staff attended fulltime while two attended the second day of the workshop. These different sources of information and perspectives informed the agenda for the face-to-face workshop.



Figure 3: Key steps and information sources for the SPM learning review

These are captured in a learning constellation (see below) that situated the basic subject of the discussion (i.e., the SPM model and experience) within the broader elements of (a) foundations, i.e., the history and other pre-conditions that preceded the SPM as well as the evolution/progress in shared aspirations and language underpinning the SPM experience to-date, (b) the broad context of poverty and inequality, mediated through the partnership experiences in the three key OP program portfolios of gender justice, resilience and humanitarian action, and (c) the broader ecosystem of other development and humanitarian actors including donors whose policies and practices of development partnership influence/inform the practice of SPM, and vice-versa.



Figure 4: The SPM review learning constellation

Participants and partnership profiles

Partners. Partners were expected to participate in the learning process in a number of ways: (a) representation in the reference group, (b) participation of a bigger number of partners in the online survey, (c) participation of a smaller number of partners in the face-to-face learning workshop, and (d) feedback to the draft learning report.

For the purposes of the learning review, Oxfam Pilipinas identified 50 key partners, encompassing national non-government organizations (34, including youth and women’s rights organization), international NGO (1), academic institutions (3) government (6) and private sector (business) entities (4). The 50 partners can also be categorised according to their geographic scope, i.e., national coverage (18), sub-national/provincial or regional coverage (28), national and sub-national (3) and global (1). Portfolio-wise, the 50 organizations were distributed as follows: resilience (11), gender justice (14), humanitarian action (10) and multi-portfolio engagement (15).

Oxfam Pilipinas. Oxfam Pilipinas identified its main (and secondary) point persons for the systematization process. The point persons interfaced with the steering committee composed of the OP Executive Director and Oxfam in Asia Regional Program Quality Lead. Oxfam Pilipinas also nominated three representatives to the reference group. All OP staff were invited to participate in a pre-face-to-face meeting survey while a smaller number of staff were nominated to participate in the face-to-face meeting.⁸

⁸ The balance between Oxfam Pilipinas and partners participants in the face-to-face learning workshop was a key consideration.

Reference group. An important feature of this learning review process was the formation of a reference group (otherwise known as echo group in systematization literature) consisting of representatives from OP and partners. The reference group was composed of three representatives from OP, three representatives from partners and the external facilitator, all of whom interfaced with members of OP SPM review project group.

External facilitator. The independent consultant assumed the role of main learning review facilitator, supporting the sensemaking process and preparing the review report.

Note that majority of the participants in the face-to-face learning workshop were not present when the SPM was developed.

CONVERSATION ON STRATEGIC PARTNERSHIP - INSIGHTS, LEARNING POINTS AND ACTION STEPS

“Those who have a ‘why’ to live can bear with almost any ‘how’”
Viktor Frankl, Man’s Search for Meaning

LEARNING POINT 1 – Revisiting the multi-faceted foundations on which partnerships stand

Discussion questions: What are the foundations and starting points upon which strategic partnerships are built and nurtured? How can transformative partnerships address local ownership and empowerment in the midst of significant challenges in the development and humanitarian ecosystem? What role can Oxfam Pilipinas play in localization as an Oxfam affiliate, and how does this transformation in Oxfam identity impact partnership dynamics?

Shared intent and aspiration, aligned objectives

The conversation. Oxfam Pilipinas is committed, along with the global Oxfam community, that partnerships and strategic collaborations are essential for achieving meaningful and durable social change. In essence, the elements of this commitment are expressed in their strategic partnership model, i.e., mutually empowering, mutually supportive, complementary, respectful, transparent, mutually accountable and long-term relationships that are aware of power dynamics in development cooperation. The strategic partnership model was focused on creating impact, fostering growth, responsible resource utilization, supporting co-creation of programs, learning and knowledge building, innovation and experimentation, fostering growth, strengthening organizations and moving away from a sub-contracting modality.

Oxfam Pilipinas’ partnership principles reflect its view of its relationships with partners on a co-leadership and co-equal bases and their commitment to being a responsible and effective partner. Moreover, it has adopted a systems perspective, recognising the importance of interacting with diverse stakeholders to create a comprehensive impact on rights, resilience, poverty and all forms of inequality, with a particular focus on gender inequality in the Philippines.

Oxfam Pilipinas and partners are committed to working together to address poverty and inequality, based on shared strategic intent that resonate with the mentioned aspirations. As indicated by results of the online survey and relevant discussions in the face-to-face learning workshop, Oxfam Pilipinas and partners are committed to fostering developmental and transformative partnerships, solidarity and mutual legitimacy, and alignment of goals and strategic directions, for promoting rights, gender equality and sustainable solutions to poverty and inequality. They expect these partnerships to continue to prioritise innovative work, community-led and place-based programming, participatory budget construction, and empowerment of marginalised groups.

The face-to-face workshop participants also emphasised the importance of parties to a partnership to be clear about their respective roles and responsibilities within the partnership. Such effort includes championing the promotion of local (partner) leadership, on one hand, and Oxfam Pilipinas optimising its global links to facilitate, broker, fundraise and support innovation, on the other.

Suggested action steps. Cognizant of the need for continuous reassessment and rejuvenation of shared goals and objectives of partnerships, the face-to-face learning workshop participants proposed an updated, explicit formulation of the shared goals and objectives of strategic partnership between Oxfam Pilipinas and its partners. Strategic partnerships should sustain mutually empowering solidarity relationships among development and humanitarian actors, rooted in co-creation and shared leadership, with emphasis on strengthening local initiatives. The partnerships should support influencing, long-lasting innovations, institutionalization of good practices, and increasing knowledge, skills, credibility, legitimacy and resilience of all the parties involved. Additionally, the partnerships should generate interest from other stakeholders to support and contribute to the shared goals.

It is essential to link the high-level aspiration to operational, practical aspects, particularly with mechanisms to strengthen accountability to local communities. This aspect of the partnerships connects the strengthening of local initiatives with influencing, innovation and the diffusion of successful initiatives more broadly to achieve wider and lasting impact.

Finally, these shared goals and objectives are not set in stone. As external and internal contexts of development actors evolve and change, so do the modalities, dynamics and expectations regarding partnerships. Thus, the need to revisit, interrogate, challenge and rejuvenate these aspirations.

Local leadership, power and identities

The conversation. A fundamental aspect of the strategic partnership aspiration is advocating **local leadership** in development and humanitarian work. Oxfam Pilipinas and partners are profoundly committed to such principle, as evidenced by its involvement in initiatives like the local humanitarian leadership agenda, decolonization of aid and its stated belief that local actors, due to their proximity and responsiveness to local contexts and dynamics, can most effectively drive development and humanitarian work.

Initiatives aimed at fostering resilient partnerships play a significant role in amplifying local leadership in development and humanitarian work. These initiatives include mutual capacity building, organizational development and leadership strengthening. Simultaneously, addressing challenging realities such as power disparity, prioritising compliance over quality and the lack of access to predictable and timely resources is critical. Efforts to manage power-based dynamics and practices, support partner innovation, promote government-led local leadership and facilitate synergistic work across portfolios are crucial. Furthermore, creating spaces for feedback and influence contributes to enhancing the effectiveness of local leadership and driving positive change in the communities being served.

It is clear from the historical overview and survey of partnerships that issues related to localization and local leadership - including a shared understanding and language of localization - often originate from questions about the identities of the parties involved in the partnership and localization efforts. In fact, this consideration of identity is crucial and influences all other aspects of the partnership question.

One end of this identity equation concerns the implications of Oxfam Pilipinas becoming a full-fledged affiliate of the Oxfam International confederation. This change impacts its identity, roles and expectations concerning partnerships and interactions with various stakeholders in the Philippines and beyond. While relevant questions have been raised and discussed both within and outside of Oxfam Pilipinas, the answers remain somewhat unclear. Therefore, robust conversations are expected to happen over the coming months and even years to further clarify these issues.

Some of these questions are:

1. What is the direction and scale of growth for Oxfam Pilipinas as a national organization and actor? What implications do these developments have on Oxfam Pilipinas' capacity or potential to commit to strategic, long-term partnerships?

2. What are the practical implications of Oxfam Pilipinas becoming a national organization on its resource mobilization given its current role as resource aggregator? To what extent will it be competing for resources vis-a-vis other national organizations and local actors? How will Oxfam Pilipinas navigate its funding environment?
3. What are the practical implications of Oxfam Pilipinas, as a national organization and development actor with substantive global ties and relationships, in terms of its representation role and voice discourses and decision-making spaces?

The other end of the identity equation concerns the ongoing shifts in identities, priorities and development roles of Oxfam Pilipinas partners. As many of them take on the challenge of being effective national and local leaders (and by extension, regional and global leaders, in the case of some partners), the parameters and dynamics of partnerships shift.

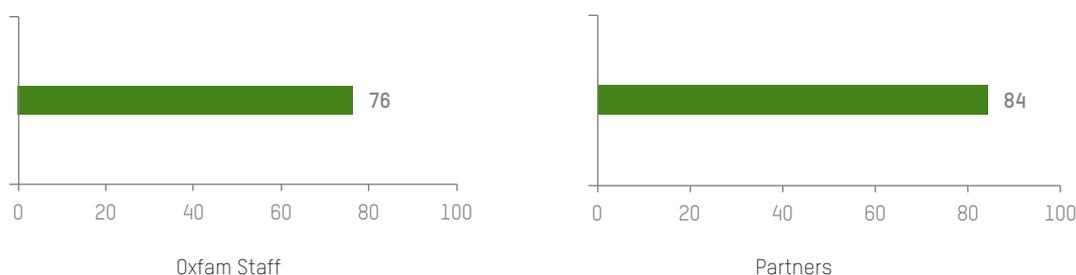
It is imperative for Oxfam Pilipinas and its strategic partners to address these identity questions, more urgently the matter of Oxfam Pilipinas' full Oxfam International affiliation and its policy and practice implications on local leadership, legitimacy, depth of local presence and downward accountability. These questions inevitably impact power dynamics, especially around resources and representation.

Suggested action steps. The face-to-face learning workshop participants underscored the need and urgency to have Oxfam Pilipinas and partners conversation on what full affiliation means and its implications on strategic partnerships. Part of this conversation was the identification of influencing priorities and collaborative initiatives that Oxfam and partners need to undertake within or outside of a project/grant framework. For Oxfam, it is imperative that it can communicate effectively its new national/local identity with global perspectives as well as weaving its three portfolios (or whatever thematic priorities it might have in the future) into a unified narrative on transformative partnerships and development work.

Shared language, vocabulary

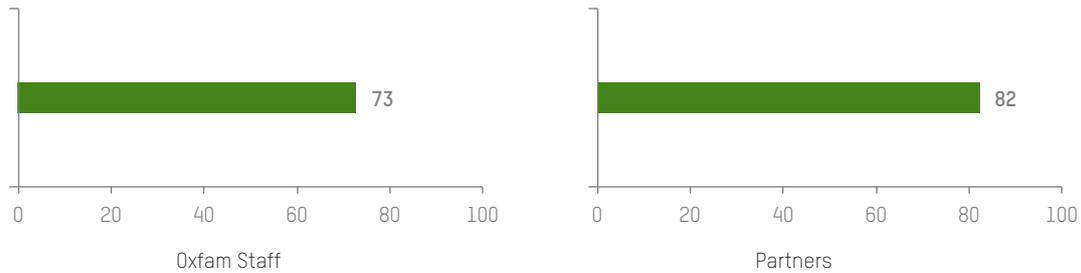
The conversation. Another foundational element of partnerships is the development of a shared language and vocabulary, especially key concepts deployed in describing the relationship. In different places and occasions, Oxfam Pilipinas and partners variously refer to the collaborative relationship as “development partnership,” “transformative partnership” and “strategic partnership.” Majority of survey respondents reported a significant change (average of 76 on a scale of 0-100) in their understanding of these concepts in the last five years or so.

How has your understanding of development partnership changed?



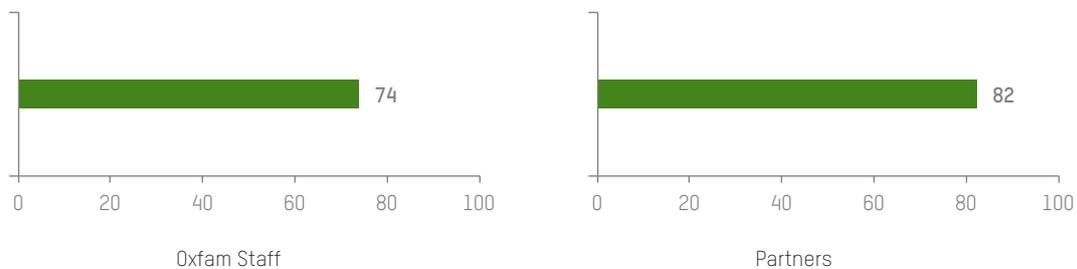
Development partnerships are understood as mutually beneficial relationships that foster shared efforts, resources or knowledge (real-time collective learning), built on trust and equality between parties involved to achieve common development goals or meaningful and lasting impact. By emphasizing relationships and processes, development partnerships create win-win situations for the parties to the relationship. The collaboration between Oxfam Pilipinas and SIKAP/FPOP was cited as an example of such partnerships.

How has your understanding of development partnership changed?



According to the survey respondents, **transformative partnerships** focus on developing partners' (local) leadership, transforming organizations, individuals, families and communities. The partnerships are built on shared values, mutual respect, learning from one another and commitment to sustainable, long-term impact. Transformation of organizations, especially in terms of development effectiveness, is deemed important as transformative partnerships value shared expertise and strengthened core competencies. The focus on partnership impact and the experience of working together on complex, intersectional issues contribute to sustainable outcomes that extend beyond the partnership period.

How has your understanding of strategic partnership changed?



Strategic partnerships are defined by the focus on each partner's vision and mission, identifying unique attributes to avoid unnecessary redundancies and working towards sharper and closer alignment of mandates and goals, shared resources, which ensure mutual benefits from collective/common resources. Alignment in development practice is also an important attribute of strategic partnerships, especially in terms of aligned advocacies. These partnerships emphasize due diligence in partner identification, preparation, communication and adaptability. Ultimately, strategic partnerships concentrate on fostering quality relationships that yield stronger, lasting impact.

These ideas about strategic and transformative partnerships were deepened by the participants in the face-to-face workshop as they considered essential partnership elements of collaboration, co-leadership, co-creation and mutual accountability, with emphasis on empowering self-sufficient partners (local organizations). Strategic and transformative partnerships are organic relationships that evolve and change, responding to changes in internal and external contexts and learning from successes and failures, whilst remaining focused on institutionalization of progress and built capacities, sharpening the value-add of individual partners and deepening collective legitimacy. Strategic, transformative and empowering partnerships ultimately translate into more profound and lasting impact on communities and groups of people.

A shared language or vocabulary is crucial to strategic partnerships, which is facilitated by sharing practices, resources and knowledge. This shared language or vocabulary enables organizations and stakeholders to embark on a mutually satisfying development journey. This shared understanding enhances impact and sustainability, and fosters collective learning to improve practice and achieve better results. Sharpening the nature of strategic partnerships, whether they are formal or informal, grant-based or non-grant-based, traditional or non-traditional, allows organizations to expand their partnerships beyond funding-based relationships.

Suggested action steps. When Oxfam Pilipinas and partners talk about partnerships, they should be more consistently inclusive instead of being caught up in the usual US and THEM framing. When organizations talk about partnership, their language could be infused with elements such as legitimacy (localization), accountability and added value (responsibilities and accountabilities), nurture (enabling environment), gender and thematic goals (clear reference to gender justice, rights-based work), understanding (avoiding jargon), alignment (complementation and synergy), good partnership conversations (punctual checks of partnership relations) and empowerment.

It was also suggested for Oxfam Pilipinas and their partners to explore equivalent terms and concepts in local languages and dialects to broaden the community of people who understand strategic and transformative partnerships (as well as the basic concepts of localization and local leadership). Such shared language should extend beyond Oxfam Pilipinas and partners and will inevitably be related to constituency and legitimacy.

LEARNING POINT 2 – Setting up partnerships, how do effective and appropriate partnerships start?

The conversation. The primary issue in this conversation is how Oxfam Pilipinas can enhance its partner selection process, particularly in identifying development and humanitarian entities that have the potential to play a critical role and contribute to programs and projects that create strategic changes in communities. Such initiative includes seizing trans-country opportunities for influencing. A corollary issue is how Oxfam Pilipinas can clarify its role as a funder/development NGO and the implications on its policies and internal systems to further realise empowering, accountable and flexible partnerships.

How can Oxfam Pilipinas identify and support critical new partners effectively? Considering that development partnerships have diverse histories and internal and external contexts in which these relationships evolve and change, a number of contingent factors need to be considered when making decisions about partnerships.

Some of these factors are:

- **political** – political perspectives and political neutrality, commitment to a rights-based approach to development and humanitarian work
- **socio-cultural** – context and demographics
- **economic** – resource mobilization, access to resources, availability of appropriate resources especially for learning and knowledge sharing; navigating the challenges of decreasing development funding and competition in accessing development funding; consortium partnerships as requirements for funding
- **environmental** – disasters, emergencies; understanding how conflicts and disasters inform the shape and practical ways of working possible in specific partnerships

These factors are anchored on internal elements that include shared or aligned values and principles, strategic priorities, core competencies, compatible ways of working and accountabilities. They are also in line with the notion that effective development partnerships require time, incorporating both formal and non-formal personal and institutional dynamics.

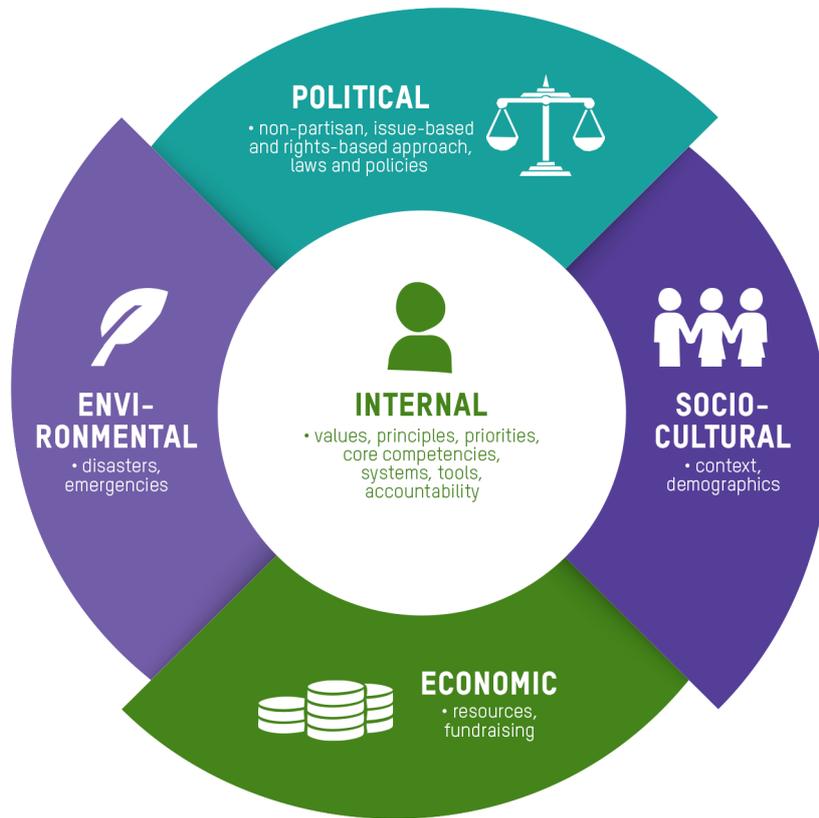
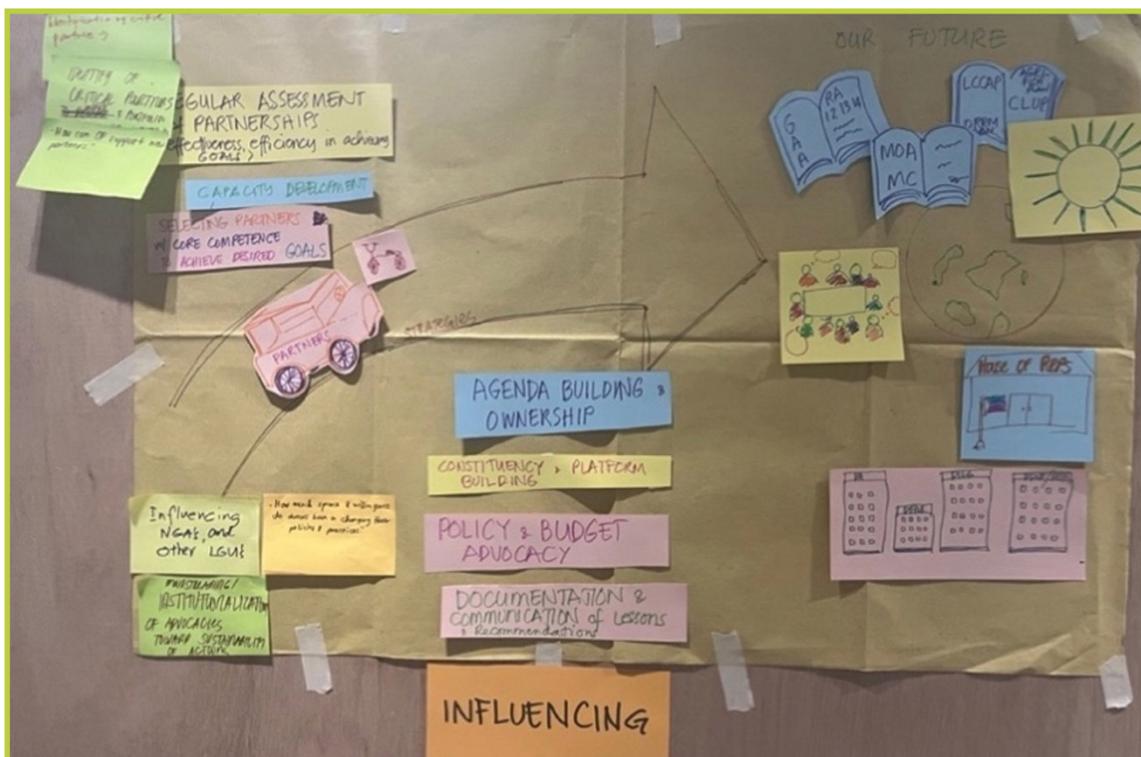


Figure 5: Contingent factors in partnership development

Several additional factors can be considered when making partnership decisions, including capacity, commitment, absorptive capacity, diversity or range of issues and advocacies, priority sectors plus the ability to respond to emergencies. The credibility of partners, social capital and networks are also critical factors contributing to a partnership's success along with shared resources and managing donor dependency. Ensuring effective partnerships necessitates addressing gaps and implementing processes for sharing innovation. Furthermore, it is essential to integrate relationship building as a key result area, considering partners' perspectives and concerns.



Development cooperation, collaboration and partnership modalities should be seen as a menu of possibilities rather than a cookie-cutter approach. Different challenges, contexts, aspirations and identities require different partnership permutations. A useful matrix for mapping and deciding on the appropriate partnership modality was developed by Ex:Change Consultancy in the early 2010s (see diagram below). The matrix has three dimensions. The outer dimensions represent different motivations for coming together – personal, political, thematic/technical, institutional and resource, and/or different combinations of these motivations. The nature and degree of the motivation will determine the possible form or structure of the collaboration (the middle dimensions), considering the size and constituency for such collaboration, the degree of formality required, the structural complexity, time scale for the collaboration and cost. Finally, any such collaboration should take into account the power relations and dynamics amongst the parties to the collaboration (or partnership).

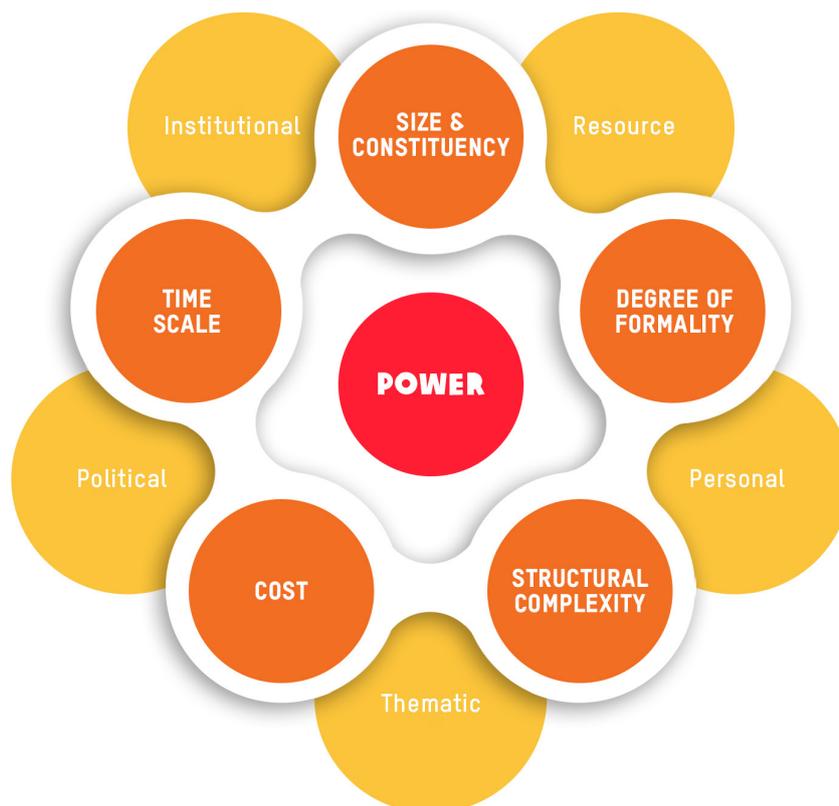


Figure 6: Ex:Change Development Cooperation Matrix

Suggested action steps. The participants in the face-to-face learning workshop suggested that Oxfam Pilipinas and partners engage more closely with different development actors and build a wider constituency plus a wider net for possible partnerships. This engagement will include influencing national government agencies and local government units, institutionalization of advocacy initiatives and tracking the implementation of successful policy gains, inclusive agenda-building and budget advocacy.

The participants also suggested a regular assessment of existing partnerships, especially their contribution to the achievement of common goals, developing better partnership instruments, and documentation and sharing lessons learned to a wider community.

Such regular assessments will also contribute to ensuring that capacity development approaches are more strategic and targeted, striking a judicious balance between collective and individual organizational learning and capacity development. This balance is crucial since partners (and Oxfam Pilipinas) each possesses different strategies, resources and capacities, and therefore will have unique timelines and support needs for capacity development. Additionally, capacity development support will need to address both new areas of growth and refresh existing themes. This is particularly important since many organizations grapple with challenges such as staff turnover, resource inconsistencies and deficits in organizational learning.

LEARNING POINT 3 – Attributing results, promoting innovations

Discussion questions: How has strategic partnership dynamics contributed to the quality of development and humanitarian work and improvements in the lives of impoverished women and men? What critical results are being achieved across portfolios and how much of those can be attributed to the partnership model? How can gender and feminist principles be better mainstreamed into partnership practices and influencing efforts?

Program results and innovations

The conversation. In the SPM, Oxfam Pilipinas expresses its commitment to “mandating the space for innovation” (cross-teaming, hearing partner ideas and bringing these forward). Partners and Oxfam Pilipinas staff have self-reported what they considered significant programmatic innovations and results in the past five years. Not all of the results and innovations reported included explicit attribution to the strategic partnership context; some are more general thematic issues and challenges. Many of the partners did mention the space for innovation afforded in their various collaborations with Oxfam (including strategy development, program design, resource mobilization, joint humanitarian action, and participatory planning at community or local level).

The face-to-face learning workshop participants also emphasised the importance of cross-thematic or cross-portfolio collaboration, both to optimise collective impact and avoid confusion on the part of partners and communities.⁹

On humanitarian action. Oxfam Pilipinas and its partners share the belief that humanitarian action is most effectively carried out by local actors. However, in certain situations, the systems, resources and capacities of local actors or partners may not always be suitable or adequate for the speed, scale and quality of humanitarian action required in specific humanitarian situations. This challenge highlights the importance of strategic partnerships between Oxfam Pilipinas and partners, as illustrated by their experiences in humanitarian work.

Investment in capacity development and institutional strengthening has proven to be essential for effective humanitarian response. Specifically, the **co-creation approach in humanitarian response** has facilitated mutual learning and improvements in the organizational systems and processes of both Oxfam Pilipinas and its partners. This approach also made humanitarian action more sustainable and less dependent on external funding.

The co-creation approach has enabled the development of tools, processes and strategies for innovation in humanitarian action. This approach begins with mapping potential partners, engagement initiatives, capacities and resource mobilization. The **disaster risk financing (DRF)** initiative is an innovative example that has expanded local humanitarian leadership and mobilised previously unexplored or untapped unrestricted funds for emergencies. Another innovative concept, the **anticipatory action framework**, is also viewed as an example of Oxfam Pilipinas’ leadership in collaborative work exploring new approaches and its role in influencing others to adopt such methodologies.

Lastly, Oxfam Pilipinas’ openness to partnering with non-government organizations and public sector entities, such as government line agencies and local government units, has led to a more expansive and systematic humanitarian action with clearly defined roles and responsibilities for partners. This strengthens the development-humanitarian nexus. Leveraging the experience and expertise of Oxfam and its partners amid diminishing resources as well as localising humanitarian leadership and building capacity for local actors are essential.

On resilience. The slogan, **from bouncing back to bouncing forward**, frames the shared understanding of resilience among Oxfam Pilipinas and partners. Their work on resilience encompasses a range of areas

⁹ See additional discussion in Section below.

and/or strategies including disaster risk reduction, climate resilience, energy transition, and the economy and environment. They are also exerting efforts to develop resilience programs that address the lack of resilience pathways, lack of tools and processes for tracking resilience (e.g., climate change tacking), and capacities (e.g., climate resilience schools). These are essential to ensure progress and adapt to the evolving challenges faced by communities.

Local humanitarian efforts contribute to resilience based on available resources, with **partner-driven innovations** playing a crucial role in promoting women's economic empowerment, climate monitoring technologies, local women's organizations and food security.

Resilience strategies often overlap with humanitarian and gender justice efforts, as in the case of women's economic empowerment, disaster risk reduction and **anticipatory action** (an innovation that emerged from collaborative work between Oxfam Pilipinas and a number of partners).

However, challenges arise from short periods of engagement that hinder sustainability and continuity, fragmented interventions, poor coordination, and difficulties in community organizing and relationship-building. Despite these challenges, resilience is fostered through the willingness to learn from past experiences, improve and build shared understanding among partners. This is achieved by developing resilience programs and enhancing absorptive, adaptive and transformative capacities.

On gender justice. In addressing gender justice within strategic partnerships, Oxfam Pilipinas and its partners agree on ideas such as integrating feminist values in partnership documents and conversations as well as mainstreaming gender components across all programs and interventions. Despite significant challenges in mainstreaming gender and feminist perspectives into programs and partnerships, the **diversity of gender-related partnerships** has led to the emergence of diverse approaches to gender issues and meaningful, multifaceted results or impact.

A consistent understanding of gender justice and clear articulation of gender issues among Oxfam Pilipinas and its partners have greatly enhanced the gender lens in partners' programs and facilitated sustained work on persistent issues (e.g., **valuing unpaid care work**), policy and practice gains such as **integrating gender-based violence and sexual and reproductive health and rights programming into local development plans**, drafting gender-based violence referral guidelines, and passage of the **anti-child marriage law**.

The partners' capacity to influence local processes and innovate helps deepen a shared vision of gender justice, emphasizing its importance as both a portfolio and a cross-cutting approach. This effort fosters a **diverse range of partners** that leads to a wider impact on women's health and sexual and reproductive health and rights.

Finally, the partnership relation among Oxfam Pilipinas and partners provide a valuable space for ensuring partner adherence (and holding each other accountable) to gender justice principles.

Suggested action points. The face-to-face learning workshop participants underscored the ongoing issue of ensuring greater alignment with feminist principles, with the understanding that feminist principles are broader than the concept of gender justice. They have identified some practical suggestions that included the following:

- inclusion of more women in the decision-making processes (develop local women leaders at various levels, establish trust fund for women to become political leaders)
- policy advocacy with feminist perspective (tracking of laws with feminist elements or principles, developing capacity of legislators to integrate feminist principles in policy making)
- capacity development on feminist leadership (beyond development of women leaders), training institute for feminist leaders, training on transformative leadership, development of curriculum and modules with feminist principles

LEARNING POINT 4 – Influencing the broader ecosystem, facing complex power dynamics and connecting different tribes

Discussion questions: How can Oxfam Pilipinas and partners effectively communicate SPM principles, capture and share good practices, and learn from others? How can inclusive partnerships, innovation and lessons from other experiences be fostered to enhance the partnership model? What strategies can grow and influence partnerships while adapting practices from other organizations and involving a wider range of stakeholders? How can Oxfam Pilipinas and partners maximise donor relations and networks to influence transformative donor agendas and practices? What mechanisms and strategies can be employed to sustain and strengthen donor networks, ensuring long-term support for transformative partnership initiatives?

Influencing and learning from other development actors

The conversation. Influencing other development actors in terms of strategic and transformative partnership policies and practices is essential. Demonstrating a strong commitment to long-lasting partnerships is critical to influencing other development actors.

Demonstrating and communicating significant results (impact) and employing participatory/inclusive methodologies help influence other development actors including donors. Examples of success for Oxfam Pilipinas and its strategic partners include influencing budget allocation, establishing credible partners in gender-based violence and sexual and reproductive health and rights, valuing unpaid care work, promoting women's inclusion in the corporate sector, anticipatory action, and integrating women's economic empowerment in local and national advocacies. Positive practices that could be influential include diverse and geographically spread partnerships, co-leadership and co-creation approach, cross-portfolio work, community-led approaches and pause-and-reflect sessions.

Suggested action steps. These achievements, captured in annual reports and explored in learning events, can be leveraged and amplified across communication platforms, including social and traditional media. This can help shape broader development practices and outcomes, ultimately creating lasting change.

On the other hand, recognising that there are other models or frames of successful or effective development partnerships is also crucial in fostering a more comprehensive understanding of collaboration dynamics. Most, if not all partners, have other experiences of partnership with other organizations and donors. In fact, many non-government organizations often refer to their different donor-affiliations (e.g., partner community of donor A, partner-consortium of donor B, consultative forum of donor C) that may be referred to as "tribes" and one organization might belong to several of these depending on how many donors they have. It will be useful to harness the learning on partnerships happening through these tribes.

Donor policies and practices

The conversation. In addition to the above, there are challenges in influencing donor policies and practices regarding partnerships in particular, and wider development and humanitarian work in a broader sense. It is important to have a robust assessment of donor policies and priorities, but it is equally important to understand donors' willingness, ability and appetite for change.

There were no explicit discussions on the broader context of aid politics and related issues such as decolonization of aid and reshaping the aid system. These topics did not emerge as specific issues during the learning review, but they clearly served as a backdrop to the more specific subjects discussed. In a sense, there was an assumption that those in the room had sufficient awareness of these issues.

The change in Oxfam Pilipinas' identity to a Philippine organization, albeit an affiliate of Oxfam International, will also pose new challenges in terms of navigating donor dynamics.

LEARNING POINT 5 – Nurturing partnerships, managing complex and complicated ways of working

Discussion questions: What are the key factors for realising sustainable, harmonised and adaptive systems and strategies for Oxfam Pilipinas and partners? How can capacity-building activities align with shared values and goals? How can interconnectedness of humanitarian, development and peace efforts be strengthened? What are best practices for establishing, reviewing and maintaining partnerships that foster effective collaboration? How can fund management and accountability requirements be balanced with the broader ambition towards empowering and solidarity-based collaboration? Has Oxfam Pilipinas become a more efficient and more valued partner?

Equitable partnerships, behaviors and attitudes

Oxfam Pilipinas is considered a valued partner whose work has contributed to the empowerment of its partners and enhancing their role and participation in Oxfam Pilipinas' programming discussions and decisions. A shared vision and clarity on roles, responsibility and accountability in gender justice, as well as acknowledgment of capacities and complementary efforts between Oxfam and partners, help ensure successful partnerships.

The roles of personalities, personal relations and culture can influence collaboration outcomes. The alignment of personal and organizational values contributes to stronger collaborations. Thus, continuously assessing Oxfam Pilipinas and partners' behaviors and values, including addressing those that pose barriers to effective partnerships, is crucial for strengthening the quality of partnerships and enhancing impact. Below are some behaviors identified by partners and Oxfam Pilipinas to be either supportive or inhibiting effective partnerships. (It is interesting to compare this to the menu of behaviors and attitudes previously included in the strategic partnership management framework, see graphic below.)

Behaviors that contribute to successful/effective partnerships. Mutual accountability, responsibility, co-management, shared leadership and positive use of power, along with strong mutual commitment and dependability, are critical to fostering effective partnerships. Behaviors and attitudes such as transparency, open and simple communication lines, empathy, active listening, embracing diversity, flexibility, agility and principled kindness support these partnerships. Emphasising learning, promoting robust conversations and discourses, nurturing innovation and creating spaces for exploration and experimentation, adopting an accommodating and proactive approach, promoting and welcoming partners' contributions are likewise important. Finally, recognising and respecting local capacity plays a significant role in building trust and confidence.

Behaviors that inhibit successful/effective partnerships. Behaviors and attitudes hindering effective partnerships include a lack of open communication, crisis management (firefighting) tendencies, micromanagement, low accountability, unreliability, superiority complex and power-based relationships, and isolationist tendencies. Furthermore, divergence in basic beliefs about development and social change, insufficient consultation and understanding of implementation challenges, inflexibility in program management, unprofessional behaviors, excessive documentation requirements, and rigid adherence to policies and processes contribute to mistrust and impede successful partnerships.



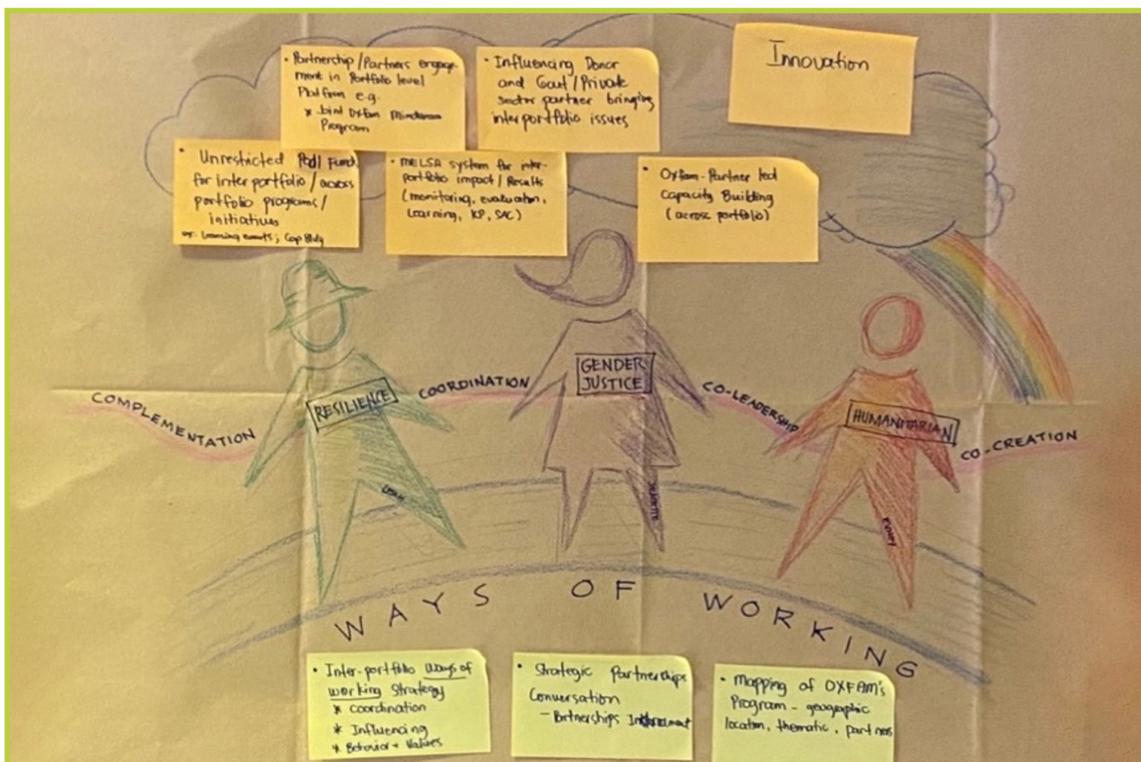
Figure 7: Behaviors and attitudes (Oxfam SPM)

Other ways of working issues

Inter-portfolio collaboration. Recognising the triple nexus of humanitarian, development and peace efforts, there is a need to enhance and strengthen interactions across the three Oxfam Pilipinas program portfolios in terms of collaborative program strategies, sharing innovations and synergistic ways of working. Such efforts will have significant implications for Oxfam Pilipinas partners, particularly in terms of their presence and contributions across the different portfolios. Breaking down programmatic silos is crucial, as evidenced by good practices such as the “saluhan” approach, which bridges resilience and humanitarian concerns. The ultimate aspiration is to progress from complementation to coordination, and eventually to co-leadership and co-creation.

Improved inter-portfolio collaboration will also have practical implications for partner and community engagement. Some partners are engaged across multiple portfolios and have expressed confusion and duplication in their interactions with Oxfam staff from different portfolios. Enhancing inter-portfolio collaboration will also benefit communities where multiple portfolio initiatives are implemented. If these initiatives are carried out in an integrated, or at least collaborative, manner, it will likely lead to a more efficient and effective community engagement.

A corollary question for Oxfam—is Oxfam Pilipinas looking at the possibility of funding/supporting proposals from existing partners if these are outside of the three program portfolios?



Capturing and communicating results of strategic partnerships. The SPM includes an element on partnership evaluation which is a comprehensive assessment framework largely focused on managing the process of setting up, maintaining and improving, and terminating individual partnerships, even if it also includes some aspects pertaining to punctual reviews of the partnership model itself.

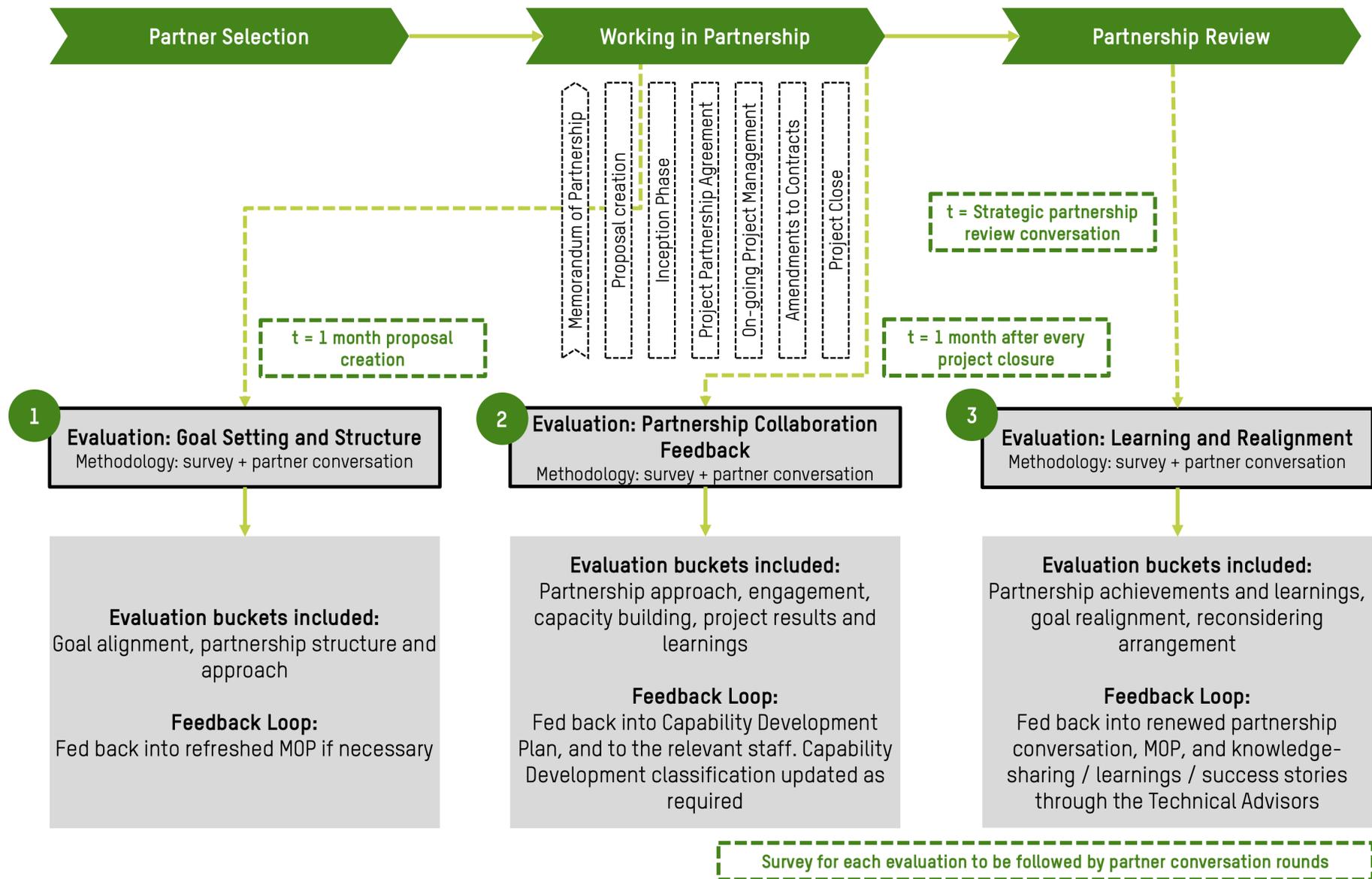


Figure 8a: SPM Partnership evaluation timeline A

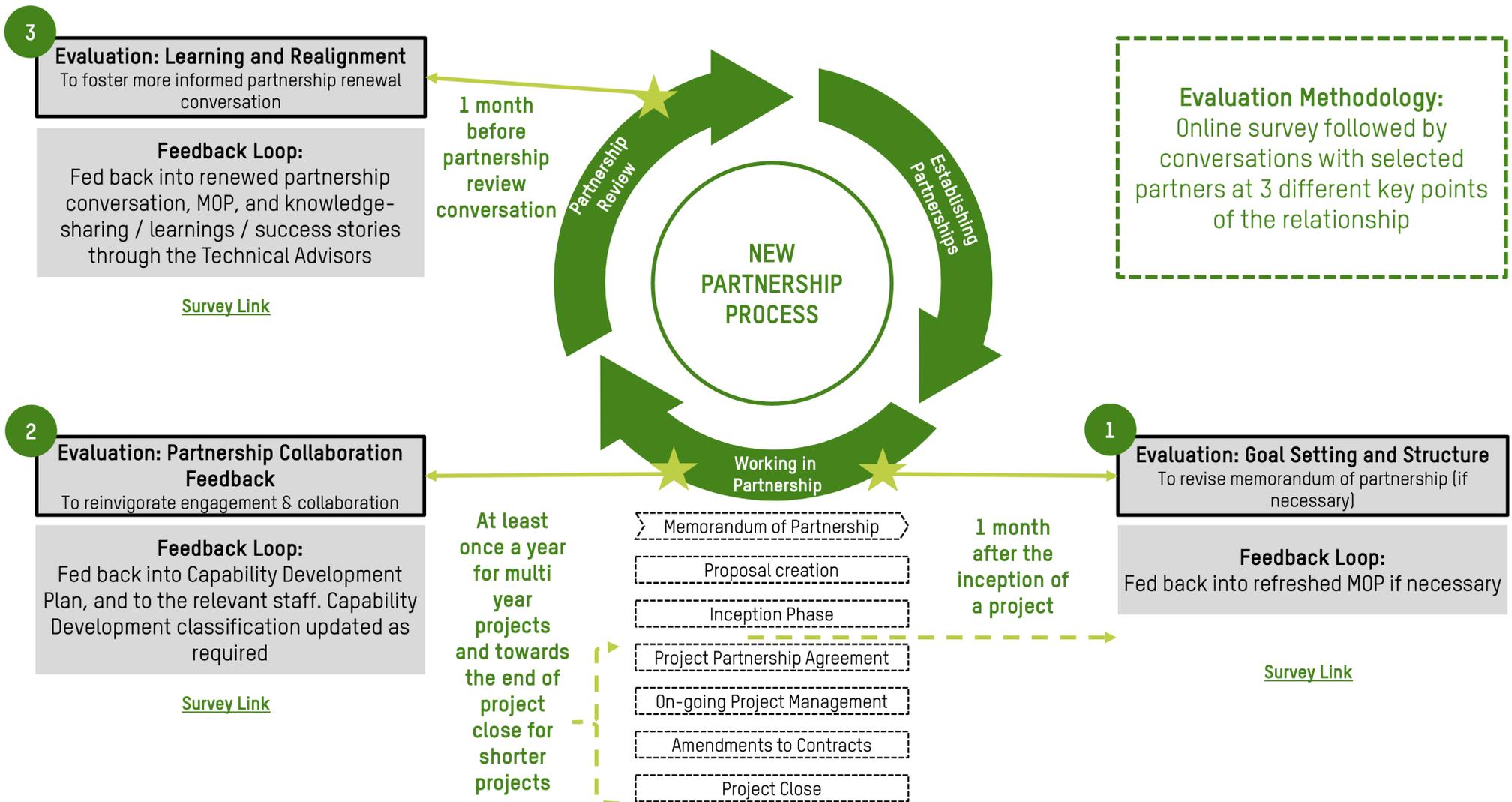


Figure 8b: SPM Partnership evaluation timeline B

However, conversations during the face-to-face learning workshop revealed that most of the Oxfam Pilipinas and partners' staff in attendance did not have an adequate familiarity with the evaluation framework of the SPM. Many of them have not participated in previous SPM assessment processes or events. One participant mentioned that most of the partnership reviews were mostly done from the point of view of Oxfam Pilipinas.

In line with such considerations, the issues and questions raised by face-to-face learning workshop participants remain relevant. How do we measure the contribution of SPM to achieving shared aspirations and addressing emerging challenges? How can learning processes strengthen partnerships and influence Oxfam's partnership strategies, policies and ways of working?

Resources. Partnerships require resources, especially as Oxfam strives to ensure that collaborations sustain ground-level interventions, track and assess impact, and guarantee that the knowledge gained is utilised by relevant groups and individuals. Will partnerships be sustainable or even possible without project resources and funding support?

Finally, a challenge was posed to the face-to-face meeting participants regarding which current elements or practices in strategic partnerships they would discard, given the tendency of many organizations (not just NGOs) to adopt more and more engagements without relinquishing any current ones. This turned out to be a not-so-easy exercise, and in the end, interestingly or perhaps unsurprisingly, participants mentioned (a) excessive reporting requirements including financial reporting, and (b) MELSA requirements.

Suggested action points

- Development of inter-portfolio working strategies including coordination in influencing (via inter-portfolio framing of issues) and other programmatic work, aligned behaviors and values, cross-portfolio partnership engagement, cross-portfolio strategic partnership conversations, starting from an updated mapping of programs and partners.
- Innovations to promote inter-portfolio collaboration e.g., partner-led capacity development across portfolios, monitoring and evaluation for inter-portfolio impact, unrestricted funds for inter-portfolio/cross-portfolio initiatives.
- Follow up/follow-through assessments or conversations (formal and informal) focused on partnership contribution to program impact, including integrating partnership assessment dimensions into regular project-level reviews/learning processes, and where possible, get inputs from community-level actors. These processes aim to assess management, ensure accountability, track progress, identify areas of success and improvement, and provide necessary support to stakeholders. More importantly, these processes should enable strategic sensing of emerging challenges and realities and proactively address those as breakthrough innovations.
- Active communication of partnership initiatives such as knowledge products derived from summative reviews of strategic partnerships, portfolio-specific partnership experiences and platforms where these are disseminated and discussed.
- Inclusive decision making where partners are consulted in key steps of the SPM updating process with inclusive and democratic decision-making.
- Suggestions from Oxfam on resources include pooled funds for program and organization development; ICR sharing with partners; developing/supporting partnership platforms/networks to leverage knowledge, partners and donors; equity and valuation to sustain organizational overheads.

CONCLUSION

The learning review of the strategic partnership model has showcased both the extensive scope and complexity of the model, as well as significant progress concerning the practice of its elements. However, this progress has been limited to key areas prioritised by participants in the learning review. There is still much more within the model to be explored. Both Oxfam Pilipinas staff and partners have acknowledged the difficulty and effort required to truly and substantively understand the model and its practical implications. There is also the unfinished business of embedding the review in the other two ongoing thematic evaluations.

The strategic partnership model has undoubtedly led to political gains, positive partnership outcomes and broader social change within the three strategic program portfolios of humanitarian action, resilience and gender justice. Throughout the learning review, conversations often covered both thematic or portfolio-specific issues and partnership-related matters. It is worthwhile to engage in deeper, more nuanced discussions of partnership dimensions in the future. Nevertheless, there is basis to expect that partnership dimensions and dynamics are gradually becoming a safe, enabling assumption of collaboration rather than a daily burden for Oxfam Pilipinas and partners to overcome.

The learning review has emphasised the importance of addressing multiple elements, dimensions and factors of collaboration between Oxfam Pilipinas and partners. Key factors for realizing effective, adaptive and sustainable partnerships include alignment of vision and intent, values and basic beliefs about development and social change, trust and open communication, active listening and mutual respect, legitimacy, solidarity, shared leadership and a sense of urgency regarding transformative change. However, these aspects must be considered alongside expectations related to organizational development, technical support, participatory assessments and evaluation, program financing, and access to funds and resources. All should work towards agreed deliverables and obligations, efficient partner management systems and formal partnership instruments, formal governance and accountability mechanisms, reporting and compliance expectations, as well as the desire for more flexible and adaptive ways of managing programs and finances.

Monitoring, evaluation and feedback mechanisms, combined with open and regular communication as well as participatory and efficient decision-making processes, aid in promptly identifying and addressing strengths and areas for improvement.

As expressed by review participants, there is a need for more good partnership conversations. These conversations are necessary for the further improvement or redesign of the model, particularly regarding recurring themes such as learning and capacity development (*towards more shared agenda and priority setting rather than dictated by one party*), agility, links and accountability to communities, legitimacy and solidarity, relationships beyond funding and sustainability (*exploring its many dimensions such as sustainability of development interventions and policy gains, sustainability of development organizations and sustainability of partnership relationships*). Addressing other learning questions not thoroughly explored during the review process will be beneficial.

There was some mention in the survey about the need to address issues micromanagement, too much documentation requirement, and adherence to rigid policies and processes, as well as expectations for Oxfam staff to extend their project visits beyond just attending project-related meetings and events. There was no significant follow-through on these issues during the face-to-face learning workshop except what the participants expressed as a desire to see less monitoring and evaluation and financial reporting requirements.

There are also conversations that need to happen internally within Oxfam Pilipinas especially in the light of its transition into a full Oxfam International affiliate and therefore formally a national (Philippine) development organization. The review or redesign of the partnership model will need to be framed by a critical review of Oxfam Pilipinas as a national development organization – potential strategic shifts, structural rethinking, resource and operational possibilities and constraints, etc. There are also other concerns raised that are better dealt with internally in Oxfam Pilipinas (e.g., partner database).

The overarching concern and the direction of change, however, should be towards simplification, in the face of more complex and uncertain internal and external conditions. According to a Boston Consulting Group survey of CEOs in 2010, “Since 1995, business complexity, as measured by the number of requirements companies have to satisfy, have risen steadily. To address each new requirement, companies typically set up a dedicated function and then create systems to coordinate it with other functions. That explains why organizational complicatedness (the number of procedures, vertical layers, interface structures, coordination bodies, and decision approvals) has seen an even sharper increase.” According to the same report, while complexity (corporate requirements) has risen by a factor of 6 from 1955 to 2010, organizational complicatedness has risen by a factor of 35 during the same period.

In addition, collaboration should not be assumed as the default approach for all situations. There are various degrees of collaboration, each requiring significant efforts and resources to ensure successful implementation. A side-by-side comparison of the covers of Harvard Business Review, ten years apart, illustrate the upsides and downsides of collaboration:



Figure 9: The challenge of navigating collaborations

Finally, by embracing the above considerations, addressing various issues, maintaining an open dialog and working towards continuous improvement, Oxfam Pilipinas and its partners can collaborate to create more impactful and sustainable partnerships that contribute more to transformative social change in the Philippines and beyond.

“We absolutely must leave room for doubt or there is no progress and there is no learning. There is no learning without having to pose a question. And a question requires doubt. People search for certainty. But there is no certainty.”

Richard Feynman

ANNEXES

ANNEX 1: BACKGROUND TO THE LEARNING REVIEW

1.1. National and regional partnership ecosystem

Partnerships in development, humanitarian work and social transformation have been present since the 1960s, evolving through various forms such as political solidarity and donor-client relationships. Influenced by factors like geopolitical dynamics, the rise of neoliberalism and recent demands for aid ecosystem transformation, these partnerships now emphasize local leadership, new development themes and decolonization of aid. Recent challenges faced in partnership dynamics include multi-stakeholder approaches, new technologies, collaborative mandates, gender equality, social inclusion, funding trends, differing priorities, accountability, capacity building, coordination, trust, transparency, bureaucracy, knowledge gaps and broader geopolitical trends. Organizations like BOND suggest new roles for INGOs to address these issues, such as interpreters, knowledge brokers, co-learners, conveners, connectors, advocates, watchdogs, critical friends and sidekicks.

Oxfam’s work in the Philippines heavily relies on collaborating with local partners. A summary document from 1998 highlights Oxfam’s strength in providing critical project and program appraisal, monitoring, and evaluation support to development actors. The organization’s in-country presence and local staff enabled a deep understanding and appreciation of the local context, fostering learning and capability-building partnerships. However, out of approximately 150 partners mentioned in the document, only three remain as Oxfam partners today, indicating the evolving nature of partnerships in the development sector.

1.2. The Strategic Partnership Model

In 2017, Oxfam Pilipinas (OP) initiated a new strategic partnership model (SPM), aligning with its commitment to refine its specific role and enhance its value within the Philippine development landscape.

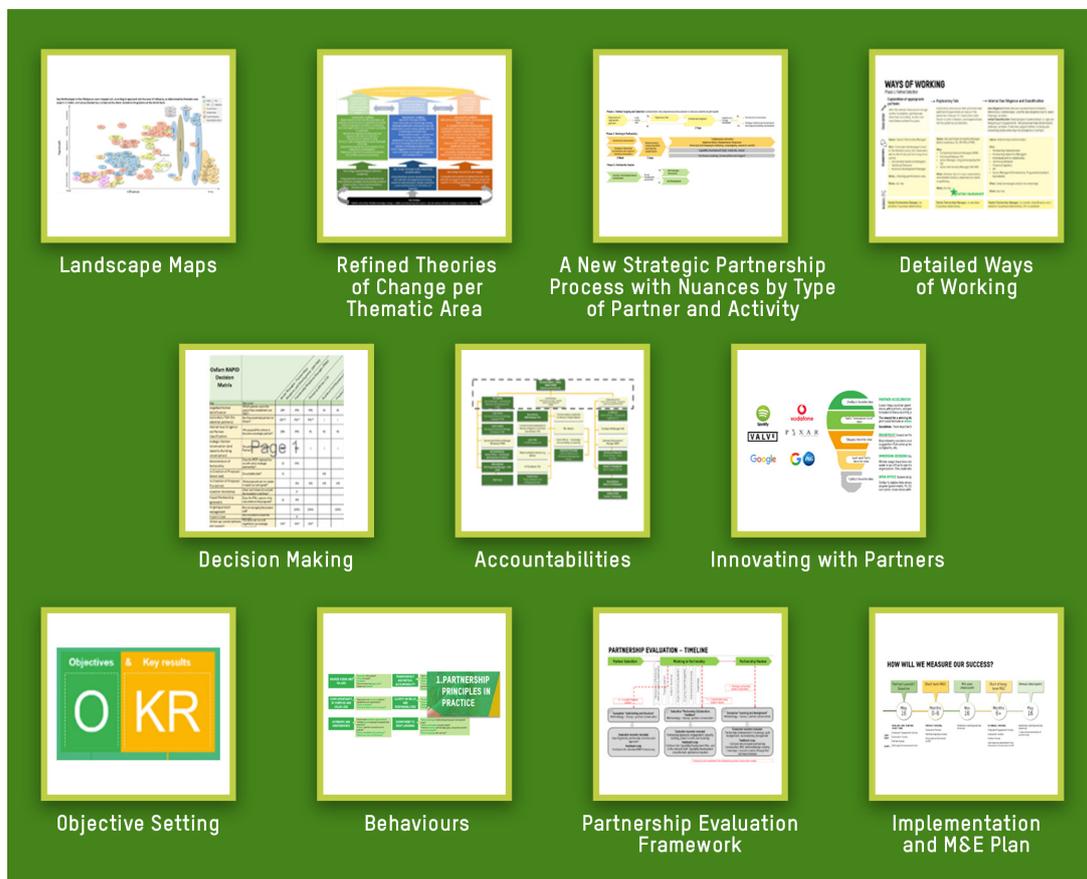


Figure 1. Key elements of the Oxfam Strategic Partnership Model

1.3. The SPM learning review

1.3.1. Focus and intent

Over the past five years, OP has worked to improve its strategic partnership model, undergoing significant transformations such as adopting a portfolio-based program approach, a new country strategy, addressing the Covid-19 pandemic and transitioning into a full country affiliate within the Oxfam confederation. In response, OP initiated a formal learning review to assess how its strategic partnership model has contributed to effective and impactful social transformation in the Philippines. The review's specific objectives include examining the quality and resilience of relationships between OP and its partners; determining the partnership's contribution to common outcomes and impact among partner communities and other social actors; understanding the model's role in systemic change and local leadership of development and humanitarian work; and identifying relevant lessons to underpin sustained discourse on partnerships between OP and its partners.

1.3.2. General approach, methodology

The learning review employs a participatory systematization approach to foster collective understanding of shared experiences, focusing on shared language, analyses and learning. It emphasizes an inclusive, collaborative learning process that addresses both individual and organizational levels while providing a safe space for broader systemic discussions around reshaping the development landscape. Methodological principles underpinning the study include creative methodologies, participatory and multi-stakeholder perspectives, complexity-aware and adaptive approaches, systems thinking, alignment with feminist principles, emphasis on values, identity and relationships, evidence-based conclusions, and adherence to informed consent and confidentiality. These principles contribute to a comprehensive understanding of the strategic partnership model within the broader ecosystem of organizations working on related themes and concerns at national and sub-national levels.

1.3.3. Participants and partnership profiles, intensities

Partners. The learning review process involves partners in various ways, including representation in the reference group, participation in a pre-meeting survey and a face-to-face learning workshop, and providing feedback on the draft learning report. Oxfam Pilipinas identified 50 key partners, including national non-government organizations, an international NGO, academic institutions, government entities and private sector businesses. These partners vary in geographic scope, from national and sub-national coverage to global reach. Portfolio-wise, the organizations are distributed across resilience, gender justice, humanitarian action and multi-portfolio engagement categories.

For the purposes of the learning review, Oxfam Pilipinas identified 50 key partners, encompassing national non-government organizations (34, including youth and women's rights organization), international NGO (1), academic institutions (3) government (6), and private sector (business) entities (4). The 50 partners can also be categorised according to their geographic scope, i.e., national coverage (18), sub-national/provincial or regional coverage (28), national and sub-national (3) and global (1). Portfolio-wise, the 50 organizations are distributed as follows: resilience (11), gender justice (14), humanitarian action (10), and multi-portfolio engagement (15).

Oxfam Pilipinas. Oxfam Pilipinas has identified their main (and secondary) point persons for the systematization process. The point persons interface with the steering committee composed of the OP Executive Director and Oxfam in Asia Regional Program Quality Lead. Oxfam Pilipinas has also nominated three representatives to the reference group. All of OP staff were invited to participate in a pre-face-to-face meeting survey while a smaller number of staff were nominated to participate in the face-to-face meeting.¹

¹ The balance between Oxfam Pilipinas and partners participants in the face-to-face learning workshop was a key consideration.

External facilitator. The independent consultant will assume the role of main learning review facilitator. The external facilitator is expected to co-lead the sensemaking process with Oxfam and partner staff/participants.

Reference group. An important feature of this learning review process is the formation of a reference group (otherwise known as echo group in systematization literature) consisting of representatives from OP and partners. The reference group is composed of three representatives from OP, three representatives from partners, and the external facilitator, interfacing with members of OP SPM review project group.

1.3.4. Key activities

Review of documents. Since the rollout of the Strategic Partnership Model in 2017, Oxfam (and at times in collaboration with partners) have conducted numerous evaluations and assessments of the SPM both as a stand-alone subject and as it is embedded in various Oxfam thematic pillars and portfolios.

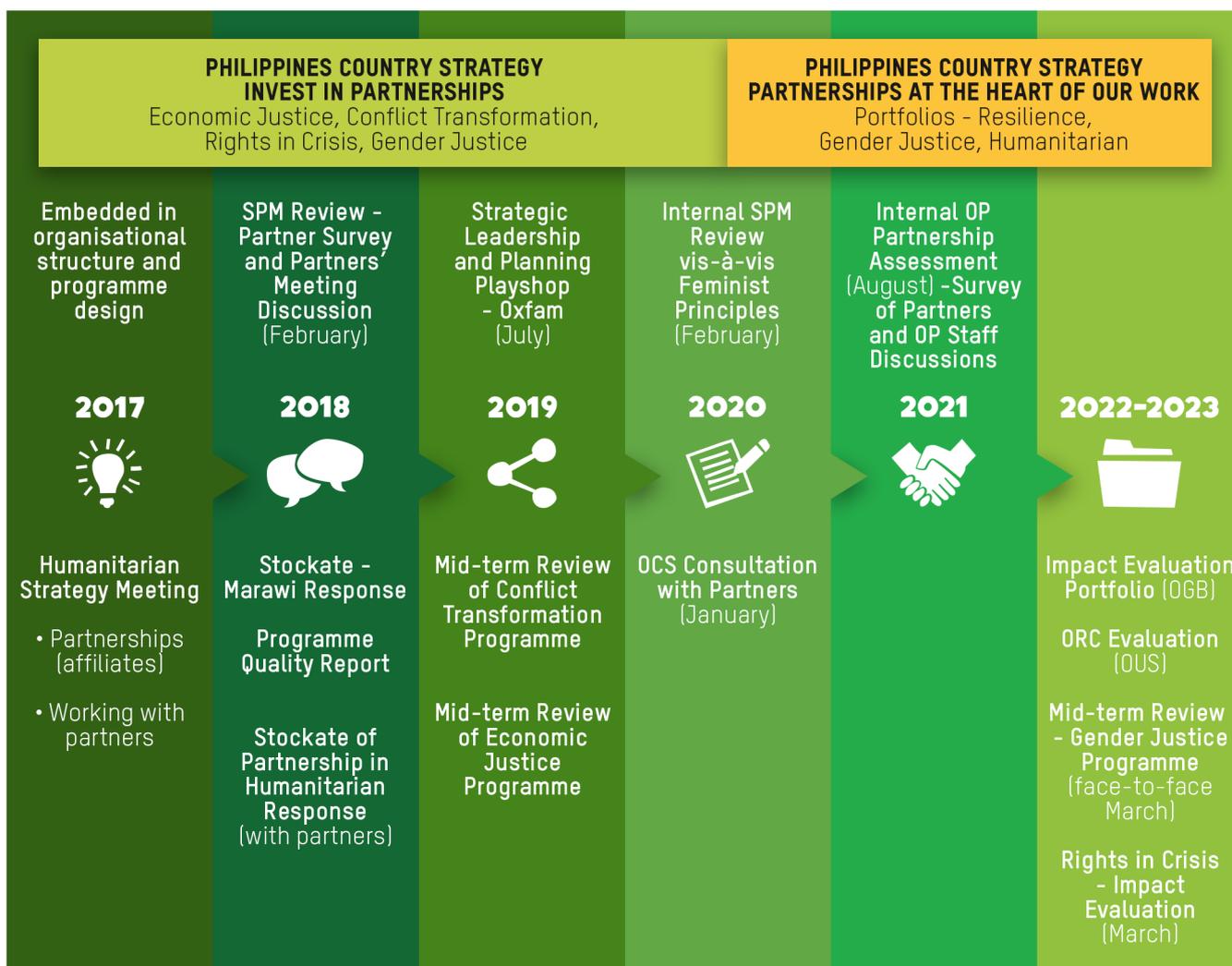


Figure 2: SMP rollout, reviews and OP strategic developments

Engagement with other review processes. To avoid participation fatigue, the SPM learning review process was integrated with other relevant ongoing or planned evaluation and review processes within OP, such as Oxfam Pilipinas' year-end assessment and planning, and programmatic reviews¹ like the Rights in Crisis Impact Evaluation. This integration allowed for a more efficient use of resources and time while still providing valuable insights and promoting collaboration among the different initiatives, ultimately contributing to the improvement of partnership practices.

¹ Integration with the gender justice program mid-term review and the resilience program review were planned but did not materialise due to incompatible timelines.

Online survey. An online survey was conducted in late March to early April 2023, targeting three respondent groups: OP staff as well as gender and resilience partners from the identified strategic partners who were not attending the face-to-face meeting. The survey aimed to gather diverse ideas from those unable to participate in the face-to-face meeting, with separate question sets for each group. Ultimately, six out of 20 partners and seven OP staff members responded. The survey results were organised and documented, serving as crucial starting points for the face-to-face learning workshop.

Online survey. An online survey was conducted in late March to early April 2023, targeting three respondent groups: OP staff as well as gender and resilience partners from the identified strategic partners who were not attending the face-to-face meeting. The survey aimed to gather diverse ideas from those unable to participate in the face-to-face meeting, with separate question sets for each group. Ultimately, six out of 20 partners and seven OP staff members responded. The survey results were organised and documented, serving as crucial starting points for the face-to-face learning workshop.

The face-to-face learning workshop. This was considered the apex event in the systematization process and was intended as a space for collaboration and conversation between Oxfam and partners, starting from making sense of the various information available to-date, i.e., review of OP documents and survey results (including feedback from the RIC impact evaluation FGD).

The face-to-face learning workshop was held on April 19-20, 2023 and was attended by representatives from OP and 11 strategic partners. The final participants to the face-to-face workshop were 10 representatives from strategic partners (five men and five women) and eight representatives from OP (two men and six women). Six of the OP staff attended fulltime while two attended the second day of the workshop.

ANNEX 2: THE SYSTEMATIZATION APPROACH

Brief description

Systematization of experience is a method aimed at improving practice based on a critical reflection and interpretation of lessons learnt from that practice.

The methodology encompasses the identification, documentation and transfer of experiences and key lessons extracted from a project or an initiative, or group of projects or initiatives for the purpose of advocacy, learning and replication/scaling up. Systematization does not end with the description of the experience and results but involves a deeper insight into how it was possible to achieve, what was achieved, what worked and what did not. What were the key factors for success? What could have been different and why? Such questions must be addressed in order to facilitate the exchange and use of development solutions.

Systematizations can be done at any point in a project or initiative. If done at the beginning, they have to be embedded as reflection spaces and milestones in the project cycle, and generate mid-term products that are distributed to internal audiences for internal learning and improvement, scaling up, etc. The knowledge products as a result of a systematization process include but are not limited to guidelines, toolkits, how-to briefs, roster of experts and case studies.

History

The method originated in Latin America as early as the 1960s. It emerged out of an increasing desire to document and communicate lessons learnt in field practice, whilst the conventional approach at that time tended to be a linear transition from theory to practice with no regard for critical reflection of the practice. According to Oscar Jara, "A new relationship between theory and practice appeared: instead of applying to practice what had previously been formulated in theory, theoretical approaches are built having as a starting point the systematization of ... practices" (2006, p.14).

Three disciplines contributed to the method: social work, popular education and development facilitation. What these disciplines have in common is that they are all practical rather than theoretical disciplines.

Utilization

Systematization is used widely in development, mostly in Latin America but increasingly in Asia, too. Use the method if you're looking for a systematic way of documenting lessons learnt in field projects, and with the intention of using those lessons to improve subsequent phases of your project. You should be prepared to communicate the lessons learnt back to the community in which you operate so they can also benefit from your project team's experience.

The methodology is particularly useful in the following situations:

1. Refining frameworks and working hypotheses for scaling up a pilot project or intervention
2. Improving visibility of a successful initiative or project
3. Learning for improvement or adjustment of ongoing projects or initiatives
4. Refining and consolidating a standard based on evidence from multiple initiatives
5. Facilitating transfer of models, experiences and lessons learned to contexts different from those where the experience originated
6. Contributing to advocacy and policy debates

Practice reminders

Purpose, focus, participants

- a clear and shared understanding of the purpose/s of the systematization process
- appropriate juncture of the experience to be systematised
- the people who have undergone the experience must be part of the process

Reconstructing the experience

- clear and shared understanding of the collective experience that is the subject of the systematization
- systematic analysis of partnership stages, policies and practices

Making sense of the experience – analysis and interpretation

- getting to the root of the learning and challenges in the collective experience, exploring different planes and dimensions
- dynamic knowledge sharing and use across different learning participants (at individual and organizational levels) and other stakeholders
- contribute to refinement of models and standards

Communicating the results

- capture, document and communicate the results for use by different participants and stakeholders within the specific learning group and beyond

Keep in mind

- Systematization is a process, not only a product. Because the process (in particular the reflection workshops) involve various stakeholders from the start, you are capturing their collective knowledge (not just the thoughts of one consultant), which in itself is a collective and participatory learning experience.
- Because you start with the demand for the knowledge, the process and the end product are more relevant and has more potential of real impact

ANNEX 3: HIGHLIGHTS OF OXFAM SPM REVIEWS AND ASSESSMENTS – 2017-2022

Review, Assessments	Results
APRIL 2017	<ul style="list-style-type: none"> • How can Oxfam build on its experiences? • The partnership model is not something new. Maybe the procedures need to be followed. • Question of how Oxfam can work in the consortium, and how it will work in the future • Working with INGOs has already been lost, and consortium is not sustained. • Question of how Oxfam can work with new actors such as UN, INGOs and the academe
MARCH 2018	<p>Advantages, achievements</p> <ul style="list-style-type: none"> • Complementation among partners • Maximization of partner networks • Regular information sharing among partners • Coordination with local governments • Strengthened advocacy work and promotion of local humanitarian leadership • More consultative process that leads to co-development of programs • Response based on local needs • Flexibility in the response • Harnessed local leadership • Funding facilitation and technical support from Oxfam • Increased visibility of local partners <p>Challenges</p> <ul style="list-style-type: none"> • Unique cultural context • Funding, logistics, absence of Oxfam focal person • Sustainability • Engagement with government
APRIL 2018	<p>Summary of partnership issue discussions</p> <ul style="list-style-type: none"> • EJ – commitment to institutional and organizational support existed but operationalization and resourcing are a challenge • CT – while there were some projects with capacity development support, these were fairly limited to project deliverables; a more strategic approach that looks beyond local NGOs needs to be considered • RIC - Although the program delivered on local humanitarian leadership, it had to be intentional in terms of growth, capability building, organizational development and institutional strengthening of partners • GJ - Formal mechanisms to regularly review roles and responsibilities of Oxfam and partners were not yet in place. The program was intentional in its approach to building partner capabilities (thematically and institutionally) but strategies were yet to be set out <p>Improvement plan – How success would look like</p> <ul style="list-style-type: none"> • Strategic partners identified with each program and MOPs signed • A partner capacity building plan set up, implemented and reviewed • Partnership model reviewed and adjusted based on learning • For RIC, in particular, plans on setting up locally managed Emergency Response Fund (ERF) shared and vetted with PAs.
	<p>What worked</p> <ol style="list-style-type: none"> 1. Joint RAT, quick monitoring and presence of partners on the ground 2. Better coordination among partners, sharing of assessment 3. Value added in coordination and linkages, advocacy and media work, gender and protection work, resource mobilization <p>What did not work, hindering factors</p> <ol style="list-style-type: none"> 1. RTR did not inform the response implementation; RTR not timely 2. MEAL implementation was rushed; MEAL not jointly developed 3. Delays in release of funds

MAY 2018

Recommendations

- There should be recognition that context dictates joint RAT activities
- Need to explain the new partnership model between Oxfam and local NGOs in emergencies with other actors
- Better planning of RTR to make it timely, purposive and beneficiary-based
- Joint MEAL planning
- Internal discussion in Oxfam re: timeliness and due diligence
- Build local capacity on communications work, packaging
- Mapping resources and capacity and building linkages with donors
- Convene one technical working group regarding digital cash platform to discuss the project, find solutions to glitches and other concerns.



2019

Conflict Transformation

- Creation of peace constituencies to support the passage of the Bangsamoro Organic Law
- Substantial number of advocacy and capacity building activities and other interventions for women rights and gender issues.
- Oxfam has been flexible and has made adjustments to support critical local peace and conflict initiatives.
- Development of women middle-range leaders that can complement existing grassroots leaders and help elevate local issues to top-level policymaking level.
- Strengthening of current local NGO partners for sustainability but also engage new ones for inclusivity.

Economic Justice

- Capacity building, support to organizations, support to community-based organizations leveraged communities' access to support services from external sources
- Short period of engagement prevented partners from sustaining initial negotiations
- Fragmented interventions and poor coordination among partners affected the responsiveness of initiatives
- Time constraints in project implementation sacrificed local relationship-building and affected community organizing processes and potential project sustainability
- Oxfam seen as sometimes too busy
- Partnerships perceived as opportunistic and too results-focused
- Oxfam flexibility in administrative and technical support
- Oxfam MEAL framework useful to partners
- Limited support to staffing requirements



JULY 2019

- Spaces for regular open communication/exchange of ideas and conversations across the partners and within each partner organization's area of operations, would be essential in the face of a dynamically changing development landscape. This would ensure a sense of community of learning and shared response which strengthens the confidence of each leader in being "more responsive" to the teams and the communities.
- This would also be the space for (1) domestic mobilization in the face of shrinking spaces for democracy and participation; and (2) ways for Oxfam Philippines to learn and apply lessons on how to "de-bureaucratize" its operations and funding system
- Humility helps create change and Oxfam Philippines must consider partners' perspectives
- Re: compliance and our abilities, how far can partners push back?
- Balancing power" as an institutional capacity



Learn with partners

- Work in networks and consortia
- Provide opportunities to development practitioners beyond its partnerships
- Partnership management found to be slow and based on Oxfam terms

Clarify policies and partnerships

- Define role
- Revisit assumptions and strategies of the SPM
- Expand reach, cast a wider net

<p>2019</p>	<ul style="list-style-type: none"> • Strengthen development-humanitarian nexus • Improve selection process and include “unusual partners” and create partner performance standards <p>Oxfam in the Philippines</p> <ul style="list-style-type: none"> • Listening, co-creative, resourcing innovation • Partnerships redefined and reinforced towards understanding of Oxfam eventually exiting as proof of empowerment • Partnerships defined as functional, layered • Partners must be leading projects • Engage more local partners who can contribute to strategic changes in communities (localization in its truest sense) • Clearly communicate its identity to partners
<p>JANUARY 2020</p>	<ul style="list-style-type: none"> • Oxfam’s DNA program elements <ul style="list-style-type: none"> » partnership approach – working with local partners » strong gender and inclusion lens » incorporate influencing at different levels » emphasis on innovation » MELSA/knowledge and learning • What is the value of the change process? Significant shifts happened: <ul style="list-style-type: none"> » Strategic Partnership Approach (formally adapted in 2017) – Oxfam moved away from operational direct delivery to partnerships; it also said that Oxfam had a commitment to long term partnerships and defined Oxfam value add (brokering & convening, funding, knowledge and learning) <ul style="list-style-type: none"> ◊ There were other important roles Oxfam was doing such as program quality, MELSA, contract management, compliance and safeguarding ◊ Oxfam committed to long-term partnership but no resource for long-term partnership or multi-year flexible funding
<p>2020</p>	<p>SPM vis-à-vis feminist principles</p> <ul style="list-style-type: none"> • What activities we were doing with partners - due diligence, capacity assessment, GPC, RTR, evaluation, localization, learning review, gender analysis, regular consultation, different services, journeying with them, research tools to support them, working with different stakeholders, co-developing and co-writing proposals with partners • How do we manage donor-driven practices which, in turn, create pressure for our partners? • It would be beneficial and relevant to ask partners how Oxfam is faring in its practice of partnership principles
<p>AUGUST 2021</p>	<p>What worked</p> <ul style="list-style-type: none"> • Partners well-informed about agreed parameters • Keeping to commitments (e.g., timelines) • Facilitating timely responses • Supporting capacity building • Maintaining focus on mutually agreed issues and goals • Country team participatory approaches • Deepening collective understanding • Innovation, enhancing impact • Managing project engagements and utilizing partnership lessons <p>Areas for improvement, ways forward</p> <ul style="list-style-type: none"> • Management of project engagement • Using partnership lessons to enhance engagement (systematization of past lessons), improving dissemination, ensuring and tracking use • Capacity building – going beyond immediate project-based knowledge and skills requirements; broader capacity building framework • Further dialogs around partners’ qualitative feedback from the survey, support for more systems-based capacity assessments and capacity building interventions that go beyond technical knowledge and skills, and continuing enhancement of the partnership assessment framework, methods and tools including ways of sharing results with partners.

Partnerships have been a crucial part of Oxfam's work. Oxfam aspires to make a lasting and significant positive impact on poverty and injustice. Only through the collective effort of many actors that its goals and commitments can be achieved. For this reason, Oxfam has always been trying to expand and diversify its partnership with various stakeholders, including "unusual suspects." Oxfam's aspiration is to be not only a good partner, but a partner of value as well.

Oxfam is transitioning to prioritizing partnerships as the primary mechanism for program delivery and country teams are being empowered to set local strategies. Oxfam Pilipinas has also adopted "working in partnership" as a primary mode of working and has recognized investing in partnerships as a key internal change goal.

By "working in partnership," Oxfam then can add value to local partners, whose relevance is becoming increasingly important to fill the gap between communities and the government through four means: providing technical advice and capacity building, linking and convening organizations, sharing information and contacts, and linking partners to donor funds. Learning from partners' feedback on Oxfam's partnership style as being transactional, top-down and project-based, the nature of partnerships now moves towards shared values, trust and mutual learning and capability development.

Aligned with these principles are several key behaviors to abide by in working in partnership. For shared vision and principles, there is a need to understand the partner, facilitate building unity and not sowing division. For complementarity of purpose and value-add, an appreciation and recognition of partners' capabilities and requirements is key. For autonomy and independence, one key behavior is respecting partners' operations and systems.

For transparency and mutual accountability, opening feedback mechanisms and defining communication lines are deemed important. With regard the shared principle of clarity on roles, clarity should be provided during strategic conversations. As for commitment to joint learning, it should be defined at the relationship and project development stage and there is a need to practice humility, acknowledge gaps, pain points and space for feedback

Collaboration activities can take various forms, but they all have to adhere to four key principles. They have to be continuous for the partnership relationship to constantly improve. They have to be process-oriented and not just focused on the outcome. They have to be participatory and involve relevant stakeholders to maximize its effectivity. Lastly, it has to be developmental and should strive for improvement in engagement.

Collaboration activities should also be able to answer seven key questions:

1. Are partner and Oxfam's goals and visions aligned?
2. Is the partnership structure well-defined?
3. What is the level of engagement and collaboration between the partner and Oxfam?
4. Is the partnership approach equitable and participatory at each stage of the partnership?
5. Is the partnership on the right track in terms of building both partner and Oxfam's capabilities?
6. Are partner and Oxfam delivering an effective partnership?
7. Are partner and Oxfam monitoring progress and learning from each other?

When it comes to partnership evaluation, Oxfam Pilipinas has come up with guide questions that serve as metrics to measure success. Divided into internal and partner pillars, these are the key questions that have been identified:

Internal pillars - Has the strategic partnership model been effective? Has the strategic partnership model increased efficiency? Are employees more satisfied?

Partner pillars - Has Oxfam become more participatory with partners? Has Oxfam become a more equitable partner? Has Oxfam become a more valued partner?

ANNEX 4: INCEPTION REPORT



Inception Report

Learning Review of Oxfam Pilipinas Implementation of its Strategic Partnership Model (SPM)

Submitted by Roger Ricafort, Ex:Change Consultancy

15 March 2023

1. Background

In 2017, Oxfam Pilipinas initiated a new strategic partnership model (SPM), aligning with its commitment to refine its specific role and enhance its value within the Philippine development landscape. Over the past five years, Oxfam Pilipinas has collaborated with partners to improve, expand and enrich this model.

During this period, Oxfam Pilipinas has undergone substantial transformations, including a shift to a portfolio-based program approach, the adoption of a new country strategy for 2022-2027, addressing the impact of the Covid-19 pandemic and, most importantly, its transition into a full country affiliate within the Oxfam confederation.

In light of this context, Oxfam Pilipinas and its partners plan to undertake a formal learning review of their experiences with strategic partnerships. This will involve, among others, examining how they have put the new SPM's intentions into practice, navigated various operational and other challenges, and how the partnership model can continue fostering trust, respect and stronger collaboration towards meaningful and positive social change.

2. Focus and objectives of the learning review

The following overall and specific objectives were proposed by Oxfam Pilipinas and confirmed by the systematization process reference group.¹ The general objective of the proposed learning review is to assess how Oxfam Pilipinas' strategic partnership model, with its various components, has contributed to more effective and impactful work on social transformation in the Philippines. It will have these specific objectives:

- Examine the quality and resilience of relationships between Oxfam Pilipinas and its partners
- Determine how the strategic partnership contributed to the achievement of common outcomes and impact among partner communities and other social actors, including identification of relevant helping and hindering factors, as well as adaptive and innovative measures taken by Oxfam Pilipinas and its partners vis-à-vis the operating context
- Understand how the strategic partnership model has contributed to systemic change and local leadership of development and humanitarian work in the Philippines
- Identify and consolidate relevant lessons/learning from the experience re: strategic partnership model to underpin sustained conversation/discourse on partnerships between Oxfam Pilipinas and its partners

3. Proposed approach/methodology²

The overall approach. The learning review will utilise a participatory systematization approach to foster collective understanding of shared experiences, emphasising shared language, analyses and learning. This method involves identifying, documenting and communicating key lessons from an initiative (in this case, the Oxfam Pilipinas SPM) for quality improvement, strategic thinking, advocacy and influencing, scaling, accountability and systemic learning.

¹ See discussion in Section 3.

² Refer to the EOI for details.

This inclusive approach starts by defining relevant learning areas and questions agreed upon by participants, namely Oxfam Pilipinas and its strategic partners. The subsequent learning process is collaboratively developed, addressing both individual and organizational levels.

Systematization should be viewed as a mutual learning conversation in a safe space, considering broader systemic discussions around reshaping the development landscape, including decolonization of aid, anti-racism, anti-patriarchy and local leadership issues.

Methodological principles and considerations. The following principles will also underpin the systematization study:

- **Creative methodologies** – building on existing approaches and exploring new ways
- **Participatory and multi-stakeholder perspective** – facilitating robust dialog among process participants
- **Complexity aware and adaptive** – accounting for complexity and unpredictability inherent in social change, as well as dealing with novel challenges like the Covid-19 pandemic
- **Systems thinking** – understanding the strategic partnership model within the specific system of partner-organizations as well as the broader ecosystem of organizations working on related themes and concerns at national and sub-national levels
- **Gendered and aligned with feminist principles** – emphasising inclusivity, equity, empowerment, and validation of diverse experiences and perspectives
- **Importance of values, identity and relationships** – considering the importance of shared values and the relationships of individuals involved in a partnership
- **Evidence-based** – statements and conclusions are based on concrete facts and experiences
- **Informed consent and confidentiality** – persons can only be interviewed or assessed upon their informed consent. Data will not be attributed to specific individuals interviewed. The evaluator will ask explicit permission to use quotes or testimonies to present findings, if these could lead to the identification of the respondent.

Reference group. An important feature of this learning review process is the formation of a reference group (otherwise known as echo group in systematization literature) consisting of representatives from Oxfam Pilipinas and partners. This is currently composed of three representatives from Oxfam Pilipinas, three representatives from partners, and the external facilitator, all interfacing with members of Oxfam Pilipinas' SPM review project group.

4. The inception phase – activities, findings, and suggestions for next steps

4.1. The inception phase

The inception phase was intended to include an initial review of relevant Oxfam literature and the national and regional partnership ecosystem and, as a critical element of the systematization approach, the conduct of a participatory process of establishing a shared understanding (among identified participants) of the agenda, objectives, nature, conceptual framing, methodologies and time frame of the systematization process. During this phase, relevant groups, roles and responsibilities for the learning review were also expected to be confirmed.

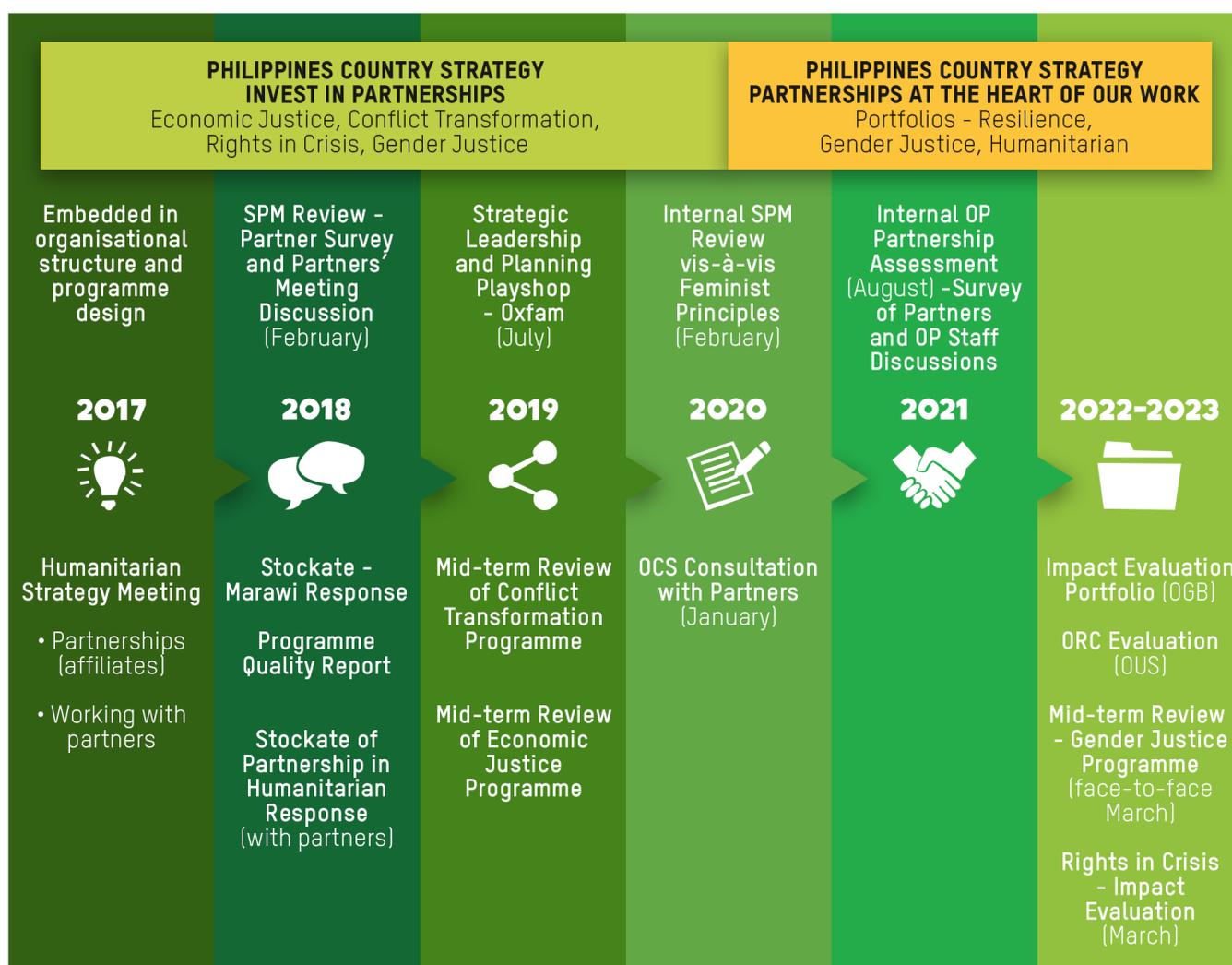
4.2. National and regional partnership ecosystem

Partnerships in development, humanitarian work and social transformation have existed since at least the 1960s, taking various forms from political solidarity to donor-client relationships. These relationships have evolved over the years, influenced by geopolitical dynamics, rise of neoliberalism and recent demands for transforming the aid ecosystem such as local leadership, new development themes and decolonization of aid.

Recent partnership dynamics and challenges include multi-stakeholder approaches, new technologies, collaborative mandates from donors, gender equality and social inclusion, funding trends, differing priorities, accountability concerns, capacity building, coordination, trust and transparency issues, bureaucracy, knowledge gaps, and broad national and regional geopolitical trends. Many INGOs, including Oxfam, have attempted to address partnership issues, with organizations like BOND proposing new roles for INGOs – as interpreters, knowledge brokers, co-learners, conveners, connectors, advocates, watchdogs, critical friends and sidekicks.

4.3. Highlights from review of Oxfam Pilipinas documents on the SPM

Since the rollout of the Strategic Partnership Model in 2017, Oxfam (and at times in collaboration with its partners) have conducted numerous evaluations and assessments of the SPM both as a stand-alone subject and as it was embedded in various Oxfam thematic pillars and portfolios.



The reviews highlight Oxfam’s strong commitment to forming partnerships with local NGOs, communities and other development actors to develop empowering and sustainable solutions to poverty and inequality in the Philippines. Oxfam has been working to build partnerships across various themes including conflict transformation, economic justice, gender justice and rights in crisis, which are the pillars in their 2015-2020 strategic plan and translated into the resilience, gender justice and humanitarian portfolios in their 2020-2025 strategy.

Oxfam has recognised the advantages of working strategically with local partners and other local development actors, including maximization of partner networks, coordination with local governments, and humanitarian and development responses based on local needs and priorities. Oxfam partnerships are

referred to as functional and layered, supportive of community organization and mobilization. At the same time, Oxfam has faced a number of challenges including engaging with unique cultural contexts, behavior and attitudes, funding and logistics, and the requirements of ensuring sustainable and durable solutions.

The various assessments have provided recommendations for improvement that cover a wide range of areas such as:

- The need to clarify further its policies vis-à-vis partnership, especially sharpening its role as a funder/development NGO and focusing on the humanitarian-development nexus
- A sharper assessment of critical partners who can contribute to strategic changes in communities and lead projects for better quality of life
- More robust assessment of impact of programs/projects and the contribution of strategic partnerships in the achievement of such results
- A more strategic approach to capacity building, better coordination and joint planning
- Enhancing internal systems to be more empowering, with shared responsibility and accountability as well as organizational flexibility
- Improvement in communicating of its identity to partners
- Alignment of the SPM with feminist principles

4.4. Key learning areas and indicative learning questions¹

This subsection details the proposed key learning areas and questions that will guide the subsequent data collection and learning processes. These ideas are derived from a review of Oxfam documents, suggestions from the reference group and discussions among Oxfam staff during their March 2023 year-end assessment and planning workshop.

Local leadership and transformative partnerships

How can transformative partnerships address local ownership and empowerment while managing funding challenges? What role will Oxfam Pilipinas play in localization as an Oxfam affiliate, and how does this transformation in Oxfam identity impact partnership dynamics? What strategies can enhance collaboration and outcomes within these partnerships?

Partnership practices and ways of working

What are the key factors for realising sustainable, harmonized, and adaptive systems and strategies for Oxfam Pilipinas and partners? How can capacity-building activities align with shared values and goals? How can interconnectedness of humanitarian, development and peace efforts be strengthened, and what are best practices for establishing, reviewing and maintaining partnerships that foster effective collaboration?

Learning from and influencing the broader ecosystem

How can Oxfam Pilipinas and partners effectively communicate SPM principles, capture and share good practices, and learn from others? How can inclusive partnerships, innovation and lessons from other experiences be fostered to enhance the partnership model? What strategies can grow and influence partnerships while adapting practices from other organizations and involving a wider range of stakeholders?

Influencing funding chain actors

How can Oxfam Pilipinas and partners maximise donor relations and networks to influence transformative donor agendas and practices? What mechanisms and strategies can be employed to sustain and strengthen donor networks, ensuring long-term support for transformative partnership initiatives?

¹ In their TOR for this learning review, Oxfam Pilipinas identified three overarching questions: Internal pillars - Has the strategic partnership model been effective? Has the strategic partnership model increased efficiency? Are employees more satisfied? Partner pillars - Has Oxfam become more participatory with partners? Has Oxfam become a more equitable partner? Has Oxfam become a more valued partner? Partnership outcomes - (wherein partners are asked to reflect on and measure successes, gaps, and impacts of the partnership), level of engagement and capacity development, informed by capacity assessment needs.

Results and relationships

How can Oxfam Pilipinas and partners examine processes and narratives to better understand partnership dynamics and their impact on people's lives? What assumptions and motivations influence significant changes? How can challenges in fund management and accountability be balanced with partnership requirements to create mutually respectful and empowering collaborations?

Gender dimensions and feminist principles

How can Oxfam Pilipinas and partners better mainstream gender and feminist principles into partnership practices and influencing efforts? What strategies can be employed to ensure the integration of gender mainstreaming, funding and identity establishment in the efforts of Oxfam Pilipinas and partners? How can a gender-sensitive approach be applied and feminist principles be integrated in partnership practices and learning?

4.5. Engagement with other learning processes

To mitigate potential participation fatigue, it was agreed that the SPM learning review process would be integrated with other relevant ongoing or planned evaluation and review processes within Oxfam Pilipinas. Three such processes were identified, as follows:

4.5.1. Oxfam Pilipinas yearend assessment and planning

The Oxfam Pilipinas team held their annual review and planning workshop in mid-March 2023. During this session, the SPM learning review facilitator provided an overview of the learning process, highlights from review of Oxfam documents and updates from the reference group. The Oxfam Pilipinas team also generated critical questions based on the key learning areas proposed by the reference group. Earlier, the Oxfam Pilipinas team also brainstormed on possible solutions and strategies to improve their partnership practice.

4.5.2. Programmatic reviews

Two relevant programmatic reviews were identified: the Rights in Crisis impact evaluation and the Gender Justice program mid-term review. To date, the SPM learning review has collaborated with the Rights in Crisis impact evaluation by suggesting several questions² to be incorporated into their interviews and focus group discussions. The SPM learning review facilitator would attend the Rights in Crisis impact evaluation synthesis meeting, if warranted, to gain insights into the relevant outcomes of their evaluation. A similar approach would be taken with the Gender Justice review as soon as it came onstream.

4.6. Participants

4.6.1. Partners

Partners were expected to participate in the learning process in a number of ways: (a) representation in the reference group (see discussion above), (b) participation of a bigger number of partners in a pre-face-to-face meeting survey, (c) participation of a smaller number of partners in the key milestone event, i.e., face-to-face learning workshop, and (d) feedback to the draft learning report.

4.6.2. Oxfam Pilipinas

Oxfam Pilipinas has identified its main (and secondary) point persons for the systematization process. The point persons would interface with the steering committee composed of the Oxfam Pilipinas Executive Director and Oxfam in Asia Regional Program Quality Lead. Oxfam Pilipinas has also nominated three

² In what specific ways have the policy and practice of Oxfam strategic partnership model [in the past five years] contributed to the substantive results of Oxfam and partners work on RIC? In what specific ways have the policy and practice of Oxfam strategic partnership model [in the past five years] either (a) nurtured/strengthened, or (b) inhibited/stifled the realization of local humanitarian leadership? What significant "pre-existing conditions" [with Oxfam, with partners, and both] before the commencement of the SPM in 2017 contributed to either progress or lack thereof in the quality of collaborative work between Oxfam and its RIC partners in the past five years? To what extent do you think has Oxfam and partners' experience, policy, and practice in strategic partnership in the past five years influenced policy and practice of other relevant RIC players in the country? Including those other entities that partners may have worked with outside of Oxfam?

representatives to the reference group. All Oxfam Pilipinas staff would be invited to participate in a pre-face-to-face meeting survey while a smaller number of staff would be nominated to participate in the face-to-face meeting.³

4.6.3. External facilitator

The independent consultant would assume the role of main learning review facilitator while the external facilitator was expected to co-lead the sensemaking process with Oxfam and partner staff/participants.

5. Main data-gathering phase, next steps

5.1. Ideas and inputs

The Oxfam Pilipinas MELSA team was tasked to administer a quick (maximum 20 minutes) ideation survey to partners and Oxfam Pilipinas staff based on the key learning areas and key learning questions elaborated in Section 4.4 above. This survey is intended to generate as diverse ideas as possible, especially since a majority of partners and Oxfam Pilipinas staff will not be participating in the face-to-face meeting.

The survey instrument will be designed and administered within the week of 26th March 2023. The results of the survey will be organised and will form part of the basis for the final design of the face-to-face learning workshop.

5.2. Face-to-face learning workshop

The milestone event for the SPM learning review is the face-to-face learning workshop scheduled for 19-20 April 2023. The consultant and Oxfam Pilipinas MELSA team have sent out initial invitations to and expect to have a maximum of 27 participants from Oxfam Pilipinas and selected partners.

The agenda for the face-to-face learning workshop will be finalised after the results of the survey have been organised. The proposed agenda will be discussed with the reference group and sent to prospective participants thereafter. This is expected on the 11th or 12th April 2023. However, the Oxfam Pilipinas MELSA team expect to have the following main blocks for the two-day event:

Day 1 – Wednesday, 19th April

- Confirming shared understanding and framing the face-to-face workshop within the broad SPM learning process
- Building a composite narrative of the partnership experience and identifying shared foundational language, aspirations, values, goals and assumptions
- Sense making and generating key narratives – insights, lessons learned, etc. – based on information to-date (such as review of documents, survey results, information from RIC and GJ processes)

Day 2 – Thursday, 20th April

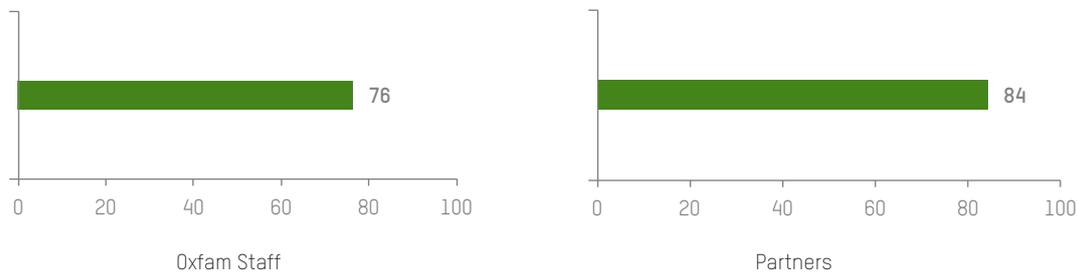
- Identifying strategic issues – sustaining innovation and breakthrough innovations – and proposals for strategic pathways moving forward
- Systems thinking – determining Oxfam and partners location and influencing within the broader development, humanitarian and funding ecosystem
- Building partners' and Oxfam Pilipinas' story and communicating outwards

³ The balance between Oxfam Pilipinas and partners participants in the face-to-face learning workshop will be a key consideration.

ANNEX 5 – SUMMARY OF ONLINE SURVEY RESULTS AND RIC FGD

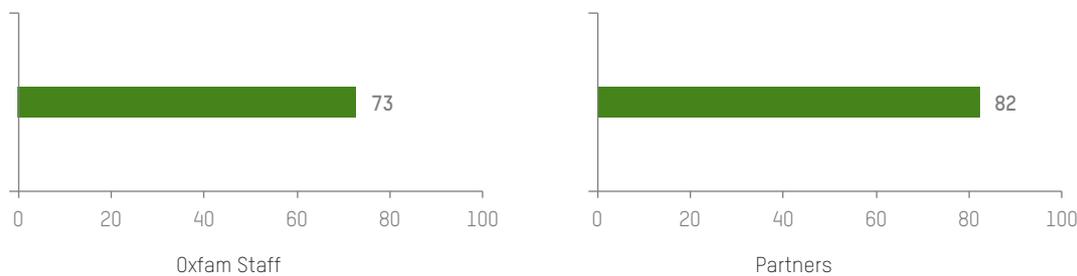
1. Building a shared vocabulary and understanding

How has your understanding of development partnerships changed since you joined Oxfam? (scale 0-100)



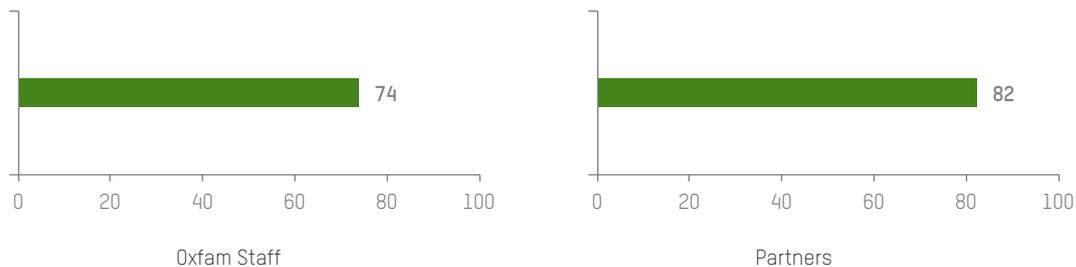
Oxfam Staff	Partners
<ul style="list-style-type: none"> • Mutually beneficial relationships • Learned about Oxfam’s partner collaboration • Shared efforts, resources and knowledge • SPM changed development partnership understanding • Built common vocabulary for productive collaboration • Institutional partners enhanced sustainability • Equal voice for partners in OP 	<ul style="list-style-type: none"> • Relationship and process in cooperation • Common developmental goals • Win-win for trust and support • Co-ownership of responsibilities • SIKAP partnership with Oxfam Philippines • Oxfam and FPOP collaboration for SRHR • Real-time scenarios enrich experience

How has your understanding of transformative partnerships changed since you joined Oxfam? (scale 0-100)



Oxfam Staff	Partners
<ul style="list-style-type: none"> • Change with visible impact • Oxfam staff accountable for partner management • Shared values • Mutual respect • Learning from each other • SPM changes understanding, yearly feedback • Transformative relationships require commitment – fairness, social justice, human rights • Uncertainty in translating into operational terms • Develop partners’ leadership towards changes beneficial to them, their families and communities • Towards long-term, sustainable solutions 	<ul style="list-style-type: none"> • Transformative partnership, shared expertise • Strengths and weaknesses are recognized • Redefined work, improved competencies • Focus on partnership impact • Experiencing partnership leads to understanding • Sustainable outcomes beyond partnership period • Learning from working together on complex issues, working on intersectionalities

How has your understanding of strategic partnerships changed since you joined Oxfam?
(scale 0-100)



Oxfam Staff	Partners
<ul style="list-style-type: none"> • Desire for more collaboration • Oxfam staff share knowledge with partners • Importance of strategic partnership in shaping programs/projects • Due diligence in partner identification • Preparation, communication and adaptability • Importance of aligned advocacies • Need to define strategic partnership – when does partnership become strategic 	<ul style="list-style-type: none"> • Relationship for shared resources and goals • Long-term partnerships support vision and mission • Identify unique attributes of stakeholders to avoid duplication • Aligned mandates and goals with partners • Mutual benefits from pooled resources • Focus on quality partnerships for stronger impact

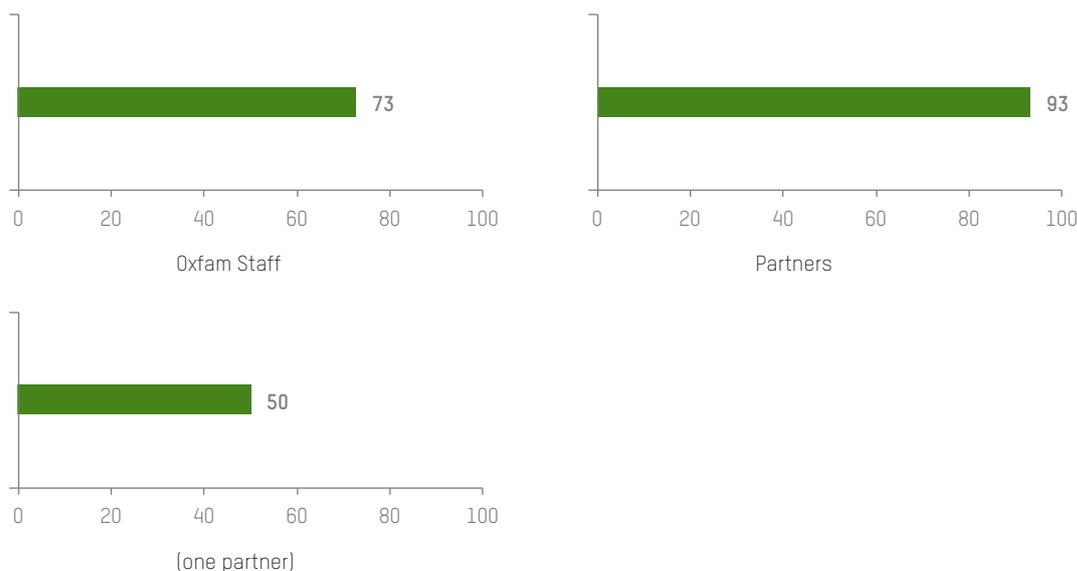
How do you think Oxfam Pilipinas’ strategic partnership model has led to innovative work?
Please give an example.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Improved reach through digital media • Increased youth involvement • Oxfam links government and other organizations • Consultative approach fosters innovation • Encourages experimentation and risk-taking • Fosters learning and growth culture • Involvement of new players such as youth-led organizations 	<ul style="list-style-type: none"> • Improved documentation in SHE project; SHE project as an innovative collaboration • Enhanced SRHR counseling for women and adolescents • Community involvement in advocacy • CAT4SRH strengthens organizational capabilities • New approaches to engage and empower communities • Sharing care work and expenses with partners

How has Oxfam Pilipinas policy and practice of strategic partnership led to a shared understanding with partners regarding the theories of change underpinning your work?
Please explain briefly by giving an example.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Local partners lead in humanitarian response • Sharing information and contacts • Constant communication for policy alignment • Portfolio approach with theories of change • Co-creating theories with partners • Regular learning reviews benefit collaboration • Consultation in developing theories of change 	<ul style="list-style-type: none"> • Project alignment with SHE project outcomes, expanded understanding of theory of change • Focus on quality of service delivery • Evolving theories of change in Creating Spaces project • Clear strategic framework and plans • Importance of organizational strengthening • Learning from frontliners’ stories and experiences

In your view, has Oxfam Pilipinas become more participatory and equitable on account of the strategic partnership model?



In your view, how is Oxfam Pilipinas adding value, if at all, to the work of partners on account of its practice of the strategic partnership model?

- Fast response in emergencies with network and funding
- Building relationships
- Sharing goals and strategic partnership model
- Encouraging innovative partner programs
- Capacity building and resource access
- Organizational benefits from capacity-building
- Adoption of Oxfam policies by partners – safeguarding, procurement

What shared aspiration should Oxfam Pilipinas and its partners aim for in their strategic partnership in the next five years?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Increase visibility, credibility and resource stewardship • Maximize technology use • Create beneficial programs • Achieve equal rights together • Community-led programming on climate change, social protection • Strategic support to partners – access to resources, networks, collaboration, policy influence • Efficiency and effectiveness improvements • Build resilient, sustainable organizations 	<ul style="list-style-type: none"> • Empower marginalized groups in governance • Achieve gender equality in human development • Decrease CEFM cases and promote advocacy • Focus on developmental and transformative partnership and mutual accountability • Advance sexual and reproductive health and rights • Contextualize project and budget design requirement • Shared goals and direction • Sustainability

(RIC FGD) What significant “pre-existing conditions” [with Oxfam, with partners, and both] before the commencement of the SPM in 2017 contributed to either progress or lack thereof in the quality of collaborative work between Oxfam and its RIC partners in the past five years?

- Before 2017, Typhoon Haiyan’s response influenced collaborative work as Oxfam’s approach hindered its partnership with local organizations. Post-Haiyan, Oxfam reduced its staff numbers and focused on partner capacity building, learning from this experience to improve its current partnership mode.

- Improving LHL required a leading local organization to manage humanitarian action, but this could increase costs due to engaging multiple organizations and logistical challenges. This issue confronts Oxfam and other international agencies, as not all local organizations are prepared to act.
- Many local organizations understand humanitarian action but may not have known key elements like Sphere standards, build back better or safeguarding. Oxfam and other international agencies could help by offering capacity-building support to potential local partners during emergencies.

2. On local leadership and transformative partnerships

How has Oxfam Pilipinas policy and practice of strategic partnership model nurtured or strengthened local development or humanitarian leadership? Please explain briefly and provide an illustrative example.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Providing advice and information, partner feedback and Oxfam response • Capacitate and empower local partners • Strengthen local humanitarian leadership • Oxfam-PRRM collaboration as an example • Consider intersectional community issues • Connect physical space, safety and sexual/reproductive health to humanitarian response 	<ul style="list-style-type: none"> • Maximize resources and expertise for project sustainability • Capacity-building through various trainings (e.g., LGUs, local consultations, SOGIE, VAWC, ASRH) • Strengthen local policies and implementation, policy advocacy • Lead by example • Nurture and strengthen partners' leadership • Engage with community partners for equitable impact

How has Oxfam Pilipinas policy and practice of strategic partnership model inhibited/stifled local development or humanitarian leadership? Please explain briefly and provide an illustrative example.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • No instance of SPM inhibiting partners • Bureaucratic system can hinder faster humanitarian leadership • Potential power disparities between parties • Local groups may be disregarded or lack decision-making power • No idea (3X) 	<ul style="list-style-type: none"> • Negative impact from lack of follow-up activities on short projects • Not the case • N/A • No experience with stifling practices • No known stifling practice so far • Strict and tedious administrative requirements tend to put more emphasis on compliance over quality outputs and outcomes • Importance of balancing documented accountability with community-based outcomes

(RIC FGD) In what specific ways have the policy and practice of Oxfam strategic partnership model [in the past five years] either (a) nurtured/strengthened or (b) inhibited/stifled the realization of local humanitarian leadership?

- During the Covid-19 response, COM practiced LHL by leading the action and mobilising local people's organizations (POs) for on-the-ground implementation. COM provided technical guidance while POs handled beneficiary identification and profiling. This approach may not work for other local organizations without people's organizations.
- A challenge to local humanitarian leadership occurred during the Typhoon Haiyan response when Oxfam's key partners (including those already part of the Humanitarian Consortium) were sidelined while international actors took the lead. As an area for improvement, Oxfam should prioritise local partnerships, map potential partners in various locations and provide capacity-building support. Such approach can reduce the need to deploy partners outside their program areas in emergencies.
- The SPM enhanced local humanitarian partnership (LHP) by focusing on policy influencing and advocacy. Oxfam leveraged its partners' strengths in advocacy and community mobilization, and having strategic partners in various locations improved Oxfam's visibility in local communities.

Please suggest two factors that are important to the realization of effective, adaptive and sustainable partnership between Oxfam Pilipinas and its partners.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Listening • Trust • Efficient partner management • Respect for one another • Partner-centered reporting systems • Alignment of ways of working • Collaboration • Teamwork • Program focus on financing • Flexibility and adaptability • Open communication • Sharing a common sense of 'urgency' for project deliverables 	<ul style="list-style-type: none"> • Support for organizational development of partners (technical or resource assistance) • Flexibility in implementation • Needs assessment from CSOs and program beneficiaries • Proactiveness • Mutual respect for each other's organizational thrusts • Monitoring and evaluation, including feedback • Open and regular communication • Identifying strengths of each partner/agency • Accountability • Practice of supportive supervision in areas where Oxfam has expertise • Singular, targeted reports on administrative compliance and project outcomes • Budget allowance incorporating non-negotiable care expenses

3. Learning from and influencing the broader development and humanitarian ecosystem

Can you cite at least one instance where Oxfam Pilipinas and its partners have influenced the partnership policy and practice of other development and humanitarian actors in the country, including other donors or funding organizations?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Influencing donors and organizations through social media, annual reports and learning events • Adhering to policies and practices of other INGOs in consortium projects • Oxfam's influence on digital programming and finance forecast, adopted by INGOs, UN agencies and local/national agencies • Oxfam Pilipinas demonstrates dedication to strong, flexible and long-lasting partnerships • Oxfam and partners influence LGUs to integrate sexual reproductive health and rights into local services and funding 	<ul style="list-style-type: none"> • Awareness effort to maximise resources and mutual benefits in partnerships • Capacity building activities (e.g., trainings) make organizations more holistic and strategic • N/A • Embracing sexual reproductive health and rights (SRHR) • Systematised and updated institutional documents for donor requirements • Documented MEAL plan improves mindfulness, measurability and communication of impact

Can you cite at least one instance where Oxfam Pilipinas and its partners have learned from and/or adopted elements of partnerships from other actors in the development and humanitarian sector, including donors and funding organizations?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Adopting policies from partners and donors for improvement • Anticipatory Action adopted by partners and supported by donors • Learning from other organizations' experiences with community-led development and participatory methodologies • Implementing 'breakthrough' plans for widespread family planning programs and services 	<ul style="list-style-type: none"> • Feedback of findings for project improvement • Oxfam supports e-Plano app by adding training for men and boys • N/A, none • Facilitating pause and reflect sessions • Incorporating care expenses in logistical and program budgets

What do you think is the most important challenge to influencing other donors or funding organizations' policies and practices of partnerships?

- Differences in advocacy agendas and priority issues
- Reliability, quality, integrity
- Flexibility in supporting programs
- One-sided partnership
- Donors having their own priorities and thrusts

4. Results and relationships

In what specific ways do you believe the policy and practice of Oxfam Pilipinas strategic partnership model in the past five years have contributed to substantive results in your work?

- Collaboration with NGOs, CSOs, private groups and government in legal empowerment and advocacy work
- Increased awareness and non-judgmental approach to LGBTQIA++ matters in medical staff
- Improvement of SIKAP manual of operations
- Providing technical support in organizational development

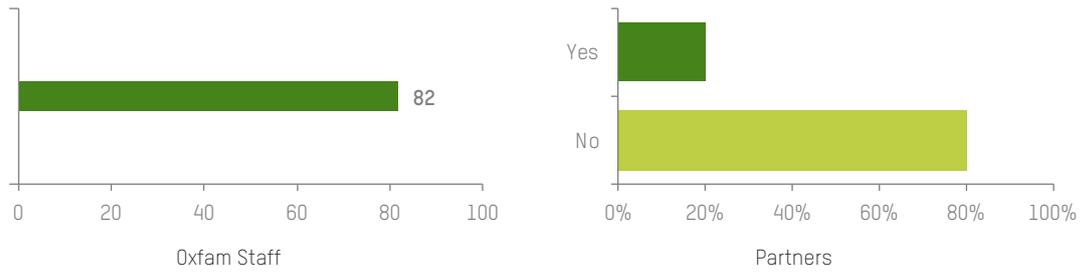
(RIC FGD) In what specific ways have the policy and practice of Oxfam strategic partnership model [in the past five years] contributed to the substantive results of Oxfam's and partners' work on RIC?

- The co-creation approach (e.g., proposal development) was beneficial, allowing partners to grow their capacity and gain knowledge from Oxfam. Regular partner meetings (conversations/ convergence meetings) facilitated learning and helped identify capacity-building needs, with Oxfam providing appropriate support. The model positively impacted partners' organizational capacity, improving operational processes, financial management and safeguarding policies. The SPM strategy helped consolidate expertise and networks.

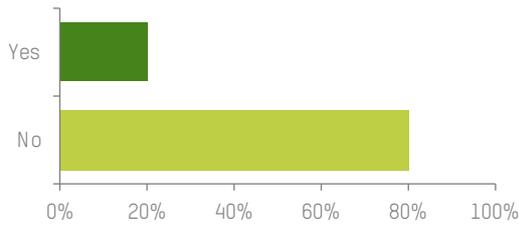
What formal or informal strategies and/or practices are in place that allow for mutual transparency and feedback between Oxfam Pilipinas and its partners? Mention two.

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Feedback mechanism and regular meetings to ensure open communication, clear expectations • Due diligence/CAPAS and financial monitoring to assess management and ensure accountability • PMEL to track progress and identify areas of success and improvement • Active encouragement sharing ideas/knowledge • Project governance mechanisms, such as Project Coordination Team (PCT) and Project Steering Committee (PSC) meetings • Field visits to assess implementation and provide support • Formal partnership agreements to outline obligations and expectations • Partnership conversations to address any concerns or issues that may arise. 	<ul style="list-style-type: none"> • Regular reporting and communication: This includes the regular submission of narrative and financial reports, as well as holding meetings and having open and clear communication channels. • Monitoring and assessment: This includes the use of tools to monitor and assess program implementations and outcomes. • Democratic and open discussions: They involve having facts-based and democratic discussions on program implementation and outcomes, where all stakeholders are heard and their inputs are considered

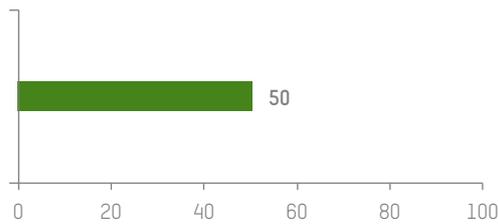
Are you familiar with the Oxfam Pilipinas framework for the evaluation and/or assessment of its strategic partnership model? (scale 0-100)



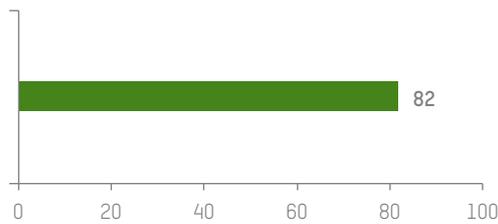
If yes, have you participated in any way in any Oxfam Pilipinas-initiated review or assessment events on strategic partnership? (partner only)



If yes, do you think your participation was substantive or meaningful? (partner only)



How would you assess partners participation in various activities related to the framework/system of review of the strategic partnership model? Oxfam staff only



- Oxfam partners attend various events/sessions for information sharing and learning.
- Partners are participative and willing to work with Oxfam.
- Open communication and feedback are critical to sustaining successful collaborations.
- Formal and informal procedures and practices are in place to promote open communication and discussion of concerns.
- Partners are consulted in key steps of SPM updating.
- No specific event has been organised yet for partners to review or revisit the SPM.

Can you provide an example of successful efforts within Oxfam Pilipinas and its partners to live out feminist principles in their partnership policies and practices?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Oxfam and partners are involved in annual IWD events • Oxfam’s efforts towards strengthening women empowerment are successful • Work with national and BWC of BARMM on women’s rights • Feminist values incorporated in partnership policies and procedures • Collaboration with neighbourhood organizations for Women’s Economic Empowerment (WEE) • Referral pathways • Clear presentation of issues, concerns and challenges of women and girls in advocacy activities and events. 	<ul style="list-style-type: none"> • Equalising partner spaces through regular consultation meetings. Very proactive emphasis on the practice and observance of feminist principles in the conduct of its projects.

From your experience, give two challenges in mainstreaming gender and feminist perspectives and principles into partnership policies and practices?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Local culture and beliefs • Lack of understanding • Lack of effective approaches and strategies to effectively reach out to men and boys in the communities • Oxfam Philippines and its partners have actively encouraged women’s leadership 	<ul style="list-style-type: none"> • Emphasis on implementation of existing laws by local leaders • Addressing gender-based violence and prioritising women’s safety • Misconceptions about feminism advocating for female superiority • Lack of exchanges with organizations working in specific sectors • Incorporating care work and expenses into project budget • Adapting project accountabilities to community contexts

5. Behaviors and future challenges

What do you think are personal or organizational behaviors that contribute to successful/effective partnerships?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • One vision • Openness, respect for diversity • Principled kindness • Flexibility and agility • Alignment of personal and organizational values • Accountability • Supportive • Strong internal and external control • Learning 	<ul style="list-style-type: none"> • Transparency and openness in communication • Accommodating and pro-active partnership approach • Mutual trust and confidence • Accountability and dependability • Innovative thinking and openness to partners’ support • Empathy and active listening • Clarity of expectations and trust-building through open communication • Welcoming of partners’ contributions and support

Can you provide an example of successful efforts within Oxfam Pilipinas and its partners to live out feminist principles in their partnership policies and practices?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Oxfam and partners are involved in annual IWD events • Oxfam’s efforts towards strengthening women empowerment are successful • Work with national and BWC of BARMM on women’s rights • Feminist values incorporated in partnership policies and procedures • Collaboration with neighbourhood organizations for Women’s Economic Empowerment (WEE) • Referral pathways • Clear presentation of issues, concerns and challenges of women and girls in advocacy activities and events. 	<ul style="list-style-type: none"> • Equalising partner spaces through regular consultation meetings. Very proactive emphasis on the practice and observance of feminist principles in the conduct of its projects.

What do you think are personal or organizational behaviors that inhibit effective partnerships?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Lack of open communication • Crisis management (firefighting) approach • Micromanagement • Low accountability • Too much documentation requirement • Oxfam staff may need to stay a bit longer in project areas and not just attend/participate in project-related meetings and events 	<ul style="list-style-type: none"> • Adherence to rigid policies and processes • Lack of understanding and consultation • Difference in values and belief • Disappearing, absence, not dependable, unreliable • Difficulty in implementation • Superiority complex • Mistrust • Conservative in terms of sudden changes in project strategies • Unprofessional behaviors • One-sided • Isolationist tendencies

What do you think is the single most important challenge to the realization of effective strategic and transformative partnership in the next five years or so?

Oxfam Staff	Partners
<ul style="list-style-type: none"> • Having a shared vision within the organization (same boat) • Open communication as a key element for successful collaboration • Competition for resources among donors • Covid-19 pandemic impact on humanitarian and development sectors • Differences in donors’ specific requirements as a potential obstacle to collaboration • Sustainability of changes beyond the life of the project • Need for demonstrating changes on a large scale, not just at individual or group level 	<ul style="list-style-type: none"> • Poor governance and lack of trust among individual organizations in the partnership/alliance • Building mutual trust based on performance or track record • Need for social and behavior change, communication as a challenge • Commitment to partnership • Dwindling funding assistance • Aligning partner and project accountabilities to the value of community and partner efforts towards the desired development impact



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