

Environment Programme

**Learning from the 2020
Environment Programme
Evaluation Results**

A strategy-focused evaluation

In 2020, Oak Foundation commissioned Emerald Network Ltd to conduct an external evaluation of the Environment Programme (EP)'s strategic framework (2016-2020) to inform the development of a new strategy (2021-2025).

Different from past evaluations, this **focused on** the various dimensions of **the strategic approach itself as a tool to deliver impact.**

We would like to thank everyone who took part in this evaluation. **We seek to build honest relationships with partners in which both success and failure offer opportunities for learning.** This is why we are sharing a summary of our evaluation findings with you today.



Please reach out to your programme officer or contact if you have any questions.

— Topics

Process

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— Process



Emerald Network used a **mix of methods** including:

- scans and wider context of the three sub-programme fields (climate, marine, wildlife trade);
- extensive reviews of the programme and its sub-programmes;
- reviews of Oak documents; and
- +80 key informant interviews.

Key informants were selected to represent diverse perspectives, including those of Trustees, Oak’s EP team, other Oak staff, grantee partners, collaborating donors, intermediaries, and individuals **offering “big system” perspectives.**

The Emerald Network team then **synthesised** the **data and analyses into a final report and executive summary.**

Evaluation questions: five lenses

Position

What is Oak's position and value add in the environment funders landscape?

Perspective

What is the strategic perspective of Oak's EP?

Adaptation

What is the EP's capacity to read and respond to changes in context, to learn from experience, and adjust its strategy and grant-making accordingly?

Effectiveness

How have Oak's EP investments contributed to change?

Execution

How has the strategy been executed?

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Relevance of Oak's strategic choices

Oak EP has positioned itself to address three of the most challenging issues of our times.

While climate, marine, and terrestrial wildlife systems are interconnected and share the same global history, there are also differences in terms of how they have transformed and what solutions are needed to build a better planet for the future.

Oak's unique position

Oak EP's positioning is pioneering and a cohesive force that has helped lead to change.

Oak is widely regarded as a credible, respected, and influential organisation that brings a unique, often behind-the-scenes, leadership.

Oak EP is also seen as a catalyst and a collaborator, and its position and success results in large part from the lead Trustees' leadership and active involvement in the programme.

Oak often work in systems, spaces, and geographies that are difficult.

Strategic approach

Oak specialises in creating the enabling structural conditions for systems change and does this through field building.

Oak mostly achieve this through convening, networking, capacity building, strategic partnership building, policy influencing through campaigns and strategic communications, and leadership development.

Oak EP also built the enabling conditions to build effective and powerful institutions with strong governance structures in place to lead change and inspire impact globally.

Oak EP often acts as a catalyst to create new fields and initiatives that are then supported and co-funded by others.

Of course, not all of Oak's EP investments have been considered effective. Several examples of this were identified in the evaluation and there is a lot to learn from these experiences.

Contribution to impact

A tentative analysis suggests that Oak's EP has made potentially significant contributions to large scale, transformational change.

The evaluators saw significant progress toward **climate change** transformation in Europe, China, and India. This can be seen in Oak's engagement across multiple systems (energy, financial, city-level, political, governance, and civil society systems).

Significant transformation potential was also noted through Oak's **wildlife conservation and trade** work, which has focused on transforming livelihoods and ecosystems in African landscapes in synergistic ways.

In addition, Oak's EP has made some significant contributions within each of the three **marine conservation** portfolios.

Strategy execution

The effectiveness of Oak's EP reflects its strong management and operating practices.

Using re-granters and intermediaries, and creating collaborative networks greatly expands Oak EP's ability to design and implement an ambitious strategy, while keeping staff count, and some other costs, low. The downside to this is reduced accountability for outcomes and the potential for a mismatch of expectations.

In terms of capacity, Oak EP's diverse, capable, and committed staff bring a high level of skill, experience, and expertise to both strategy and execution.

Their strategic and committed leadership inspires team performance and enables effective strategy execution.

The operating model also has its limits. Oak's staff can improve how they engage on issues of race and equity, and capacity to track, review, and evaluate their grant-making.

Strategy implementation process

Oak's EP has adapted to significant developments across all three sub-programmes.

Oak's EP was able to adapt its grant-making because of the strong commitment of their two Trustees, and with staff proactively: scanning systems; collecting intelligence on new opportunities and needs; testing assumptions and looking for new leverage points; and weighing the value of maintaining or adapting their grant portfolios and individual investments in light of what they are learning.

Overall, the strength of Oak's EP lies in its combination of an intended, deliberate, and emergent approach to its strategy.

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Commit to deeper engagements

Commit to deeper engagement with transformational design as an underpinning theory of change for the EP's strategy.

Consider:

- moving from a sectoral- to a system-transformation approach, grounded in systems thinking;
- deepening collective and individual capabilities to take on this approach; and
- undertaking a landscape mapping and analysis of key systems of interest.

Prioritise what Oak wants

**Prioritise the systems
Oak wants to transform.**

Consider:

- retaining the focus on climate, marine conservation, and wildlife conservation and trade as three systems vital to the protection and regeneration of the global commons; and
- expanding opportunities for flexible response and experimentation, supported through enhanced collaboration across sub-programmes and responsible exiting.

Create impact

**Amplify efforts that
maximise contribution to
transformational impact.**

Consider:

- providing leadership to sustain and reinforce the commitment to collective global action on climate, in partnership with other leading climate philanthropies;
- becoming more intentional in its grant-making, even when providing core support funding; and
- doubling down on investments in fighting single-use plastics.

Invest in new systems-of-interest

Maximise contribution to transformational impact through campaigning and other approaches.

Consider:

- working to end bottom trawling worldwide;
- strengthening wildlife conservation and livelihood improvement through reducing the exposure of communities living in and near protected areas to zoonotic diseases, and building their capacity to respond to Covid-19; and
- catalysing a global post-Covid-19 decarbonisation campaign that is fair, and forging new partnerships and alignment towards a shared vision of a regenerative, resilient future.

Enhance collaboration

**Enhance internal
collaboration
across sub-programmes
to maximise impact.**

Consider:

- exploring the value of an experimental joint wildlife conservation and trade and marine sub-programme partnership on conservation and trade; and
- creating synergies between climate and marine investments, where significant joint gains can be made.

Free up resources

Pursue responsible exiting in areas that are no longer priorities.

Consider:

- creating more flexibility and agility in the next few years, as a way to respond quicker and adapt to a rapidly changing socio-economic environment; and
- reducing or redirecting funding for selected grantee partners to create a pool of funds for a few selected "campaigns" and support to "movements".

Ensure tailor-made designs

Ensure tailor-made designs that match the needs for transformational change, drawing on Oak's growing portfolio of approaches.

Consider:

- developing a clearer analysis of EP's growing portfolio of approaches (e.g., field building, campaigns, networking, movement building), highlighting similarities and differences between different approaches, and how they can best be combined to contribute to transformational change.

Play to internal strengths

Oak's EP should continue to play to its internal strengths and make improvements where most needed.

Consider:

- completing a strategic staffing plan that goes with the strategy refresh;
- preparing for an eventual leadership transition; and
- applying best practices for use of re-granters and intermediaries.

Invest in the right MEL systems

Invest in the right kinds of Monitoring, Evaluation and Learning (MEL) systems to support adaptive and transformative learning and decision making.

Consider:

- strengthening and formalising internal MEL systems and adaptive learning, building on existing examples of sub-programme good practices and in-house MEL expertise.

Adopt an emergent approach

Adopt a coherent, principles-based and emergent approach to the strategy refresh.

Consider:

- adopting a system-transformation approach to planning the new strategy 2020-2025; and
- drawing on systems thinking and the five dimensions that structure this evaluation (i.e., position, perspective, effectiveness, execution, and adaptation) in the development of the new strategy.

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We have taken into consideration the evaluation findings and some of the recommendations in our new strategy. We will share our new strategy in the coming months, so stay tuned!