WHAT'S UP?

EQUITABLE PARTNERSHIP AT OXFAM

OXFAM

Oxfam team and partner staff gather to celebrate a year of collective effort following the conclusion of Joint Annual Review and Reflection Workshop. This workshop helps in assessing our progress, learning from our challenges, and ensuring our shared mission remains effective and community-centered. Photo: Susma Panta/Oxfam

INSIDE

EQUITY IN ACTION: BUILDING A PARTNER-LED FUTURE WITH PARTNERS' INVESTMENT FUND

The Partners' Investment Fund (PIF) was a three-year (2023–2025) flexible funding initiative implemented by Oxfam in Nepal. Guided by feminist principles and a commitment to transformative partnerships, PIF empowered Oxfam's local NGO partners to strengthen their institutional governance and leadership, ultimately enhancing their ability to deliver high-quality results and achieve greater impact.

In Nepal, the Partners' Investment Fund (PIF) serves as a cornerstone of Oxfam's 2022–2030 strategy to build truly equitable NGO partnerships. Supported by Oxfam GB, this flexible mechanism shifts the lead to local partners, giving them the autonomy to define their own objectives, set strategic priorities, and drive their own learning and knowledge-sharing initiatives.

Representatives of Oxfam's partner organizations attended a proposal writing workshop conducted by LI-BIRD. Photo: Oxfam

PIF was fully partner-led and locally designed to achieve three anticipated outcomes: (1) Strengthened organizational governance for financial performance, employee engagement, stakeholder satisfaction and overall change management; (2) Improved partner capacity to generate more resources for organizational resilience and sustainability; and (3) Established internal mechanisms for monitoring, evaluation, accountability, learning and documentation.

In a collaborative effort, Oxfam's 12 NGO partners established the fund's core principles, prioritizing co-creation, partner leadership, and mutual accountability. These values were reflected in the fund's governance, which featured a partner-led Steering Committee with Oxfam serving as the Secretariat.

Partners utilized this flexible funding to strengthen organizational management, diversify resource mobilization for long-term resilience, and institutionalize robust MEALD mechanisms to guarantee program quality.

The PIF program was initiated in October 2022 through a two-day PIF kick-off workshop attended by Oxfam's NGO partners. The workshop provided a platform for partners to explore how the PIF concept could be localized to align with their unique missions and strategic priorities, while maintaining a partner-led approach.

In February 2023, Executive Board members from partner organizations convened for a two-day PIF Design and Planning workshop. This iterative, consultative, and participatory workshop, featuring sessions conceptualized and facilitated by the partners themselves, established a comprehensive roadmap for PIF. Central to these outcomes was the collaborative development of the fund's guiding principles, anticipated impact areas, and specific indicators for measuring success.

Oxfam provided a flexible fund of GBP 300,000 (approximately NPR 51 million) to co-design and implement 241 activities, comprising both common and partner-specific activities, between March 2023 and December 2025. By design, 20 percent of the total budget could be allocated to common activities, while the remaining 80 percent could be allocated to partner-specific activities, and distributed relatively evenly among the 12 partners.

PIF PRINCIPLES

CO-CREATION

CO-LEARNING

PARTNER-LED INITIATIVE

FLEXIBILITY

TRANSPARENCY AND MUTUAL ACCOUNTABILITY

EQUITY, INCLUSIVENESS AND EMPOWERMENT

PARTNERSHIP, NETWORK BUILDING AND TEAM BONDING

PIF Mechanism

- Fully partner-led and flexible funding in its planning and implementation
- Guided through partner-formed Steering Committee with volunteers from partners
- PIF principles, anticipated outcomes and indicators of success were jointly developed and agreed upon
- Joint decision to use available 'flexible' funds only for strengthening organization's governance, leadership and overall organizational growth
- All activities identified through a transparent and fully participatory approach with little interference from Oxfam
- Common activities (20% of PIF budget) relevant to all partners, jointly identified, participated by all partners, organized by a volunteer partner
- Partner-specific activities (80% of PIF budget) of interest of each partner - identified, designed and executed by individual partner
- Focused on joint review (annual), reflection and co-learning

Tangible Achievements

- Seven partner organizations developed their organizational strategic plans, outlining clear strategies and approaches for their future direction. They used participatory methods to define their goals and strategies.
- One partner developed an Organizational Development Plan.
- 23 different policies across the thirteen partner organizations were reviewed to ensure adherence to standard procedures, Nepali government regulations, and basic standards in areas such as finance, human resources, safeguarding, gender and diversity, and fraud and corruption prevention.
- 15 new policies were developed and implemented across 13 partner organizations.

PIF NGO Partners

1. Bheri Environmental Excellence Group (BEE Group)
2. Bagmati Welfare Society Nepal (BWSN)
3. Community Rural Development Society Nepal (CRDS Nepal)
4. Community Self Reliance Centre (CSRC)
5. Forum for Community Upliftment System (FOCUS Nepal)
6. Local Initiatives for Biodiversity Research and Development (LI-BIRD)
7. National Environment and Equity Development Society (NEEDS Nepal)
8. Rural Development Centre Nepal (RDC Nepal)
9. Rural Women's Development and Unity Center, Dadeldhura (RUWDUC-Ddl)
10. Rural Women's Development and Unity Center, Kathmandu (RUWDUC-KTM)
11. Women Association for Marginalized Women (WAM)
12. Yuwalaya

SHAPING THE FUTURE: LI-BIRD REIMAGINES ITS STRATEGIC PATH

In a shifting global landscape marked by escalating climate crises and shifting donor priorities, Local Initiatives for Biodiversity, Research and Development (LI-BIRD) has successfully launched its Strategy 2030. Although planned since 2023, the strategy's development was accelerated and finalized with the critical support from PIF. The organization did not just draft a roadmap, it underwent a comprehensive institutional transformation, modernizing operational efficiency and securing its long-term sustainability.

For nearly three decades, LI-BIRD has been championing participatory research and development, driving innovation in agriculture, climate resilience, and the sustainable management of natural resources.

The formulation of Strategy 2030 was built on three core pillars. First, LI-BIRD looked inwards, evaluating past performance and organizational learnings and achievements from its 30-year history. Second, the team facilitated broad-based consultations, engaging the voices of government agencies, local communities, private sector experts and international donors to define LI-BIRD's future role. Finally, an analysis of the evolving funding and policy landscape ensured the strategy was grounded in current realities.

The launch of Strategy 2030 served as a catalyst for institutional transformation. Moving beyond the mere publication of a document, LI-BIRD immediately launched three transformative spin-off workstreams to turn the strategy's vision into measurable success.

Organizational Re-engineering:

LI-BIRD's Board and Management ensured the success of Strategy 2030 by re-aligning the organization's structure and systems.

LI-BIRD representative presenting their Fundraising Strategy book during a PIF event. Photo: Rachana Mukhia/Oxfam

This involved appointing Strategic Program Leads, re-categorizing the project portfolio, and launching a customized digital management system for HR and procurement.

A Sustainable Future:

LI-BIRD developed a comprehensive Fundraising Strategy and Action Plan (2024–2030), through a collaborative effort by the Board and management, designed to secure the organization's financial future amidst a decline in traditional NGO funding. The innovative plan diversifies income streams, moving towards non-traditional sources such as crowdsourcing, philanthropy, and internal fund generation.

Operational Precision:

LI-BIRD developed detailed Position Papers for each of its new strategic programs that serve as the operational backbone for Strategy 2030. These documents act as a Theory of Change for each program, setting clear milestones and indicators to hold the organization accountable to its mission.

Today, LI-BIRD stands as a more agile, and digitally integrated organization. By aligning its structure, staff, and funding models with a clear 2030 vision, LI-BIRD has secured its position as a sustainable leader in Nepal's development sector, ready to meet the challenges of the next decade.

REFLECTION FROM OUR PARTNERS

While PIF was a small fund, its impact was significant. It helped us cover essential costs that other project funds didn't. Specifically, it funded a consultative policy revision workshop, creation of a Digital Management System (DMS), and installation of a CCTV system to improve office site security.
Ashish Singh Rajput
Executive Director, RDC Nepal

With the support from PIF, we were able to collectively review organizational policies and create new ones to strengthen governance. We also updated our website and developed a Knowledge Management System to reach a wider audience.
Dambar Sunar
Executive Director,
BEE Group

The fund provided the flexibility needed to leverage the collective strengths of 12 NGO partners of Oxfam. This environment fostered innovation and made co-creation a central pillar of the initiative.
Dr K.K. Shrestha
Executive Director, RUWDUC

The PIF fund was instrumental in our policy transformation, enabling us to update organizational policies and develop proactive new policies, such as our first formal Safeguarding Policy.
Sunil Shah
Executive Director
BWSN

PIF provided the resources to advance our MEAL frameworks, refine our organizational documentation, and reinforce our core internal systems.
Anita Kharel
Compliance and Resource
Generation Coordinator, CSRC

The fund played a vital role in our institutional development and organizational growth. Beyond internal strengthening, it also empowered us to significantly scale our presence in the market.
Eak Raj Chhatkuli
Executive Director, FOCUS Nepal

Unlike other initiatives, this fund prioritizes holistic organizational development. This investment has been instrumental in expanding our internal capacity and professionalizing our management structures.
Madhu Rani Dhakal
Executive Director, WAM

DIGITAL EVOLUTION: RDC NEPAL'S JOURNEY TO OPERATIONAL EXCELLENCE

RDC Nepal representative sharing their reflections during an event. Photo: Rachana Mukhia/Oxfam

Rural Development Centre (RDC) Nepal's commitment to social justice and inclusive development in Madhesh Province recently reached a digital milestone. As the organization's outreach expanded, it faced a modern challenge; the manual systems were no longer enough to support its growing scale. With pivotal support from PIF, RDC Nepal successfully modernized their infrastructure. Today, RDC Nepal stands as a model of digital efficiency, setting a new benchmark for transparency and efficiency in the NGO sector.

As RDC Nepal expanded its community empowerment initiatives across complex sectors, from climate resilience to governance, manual systems became a liability, leading to delays and inconsistent data. To maintain donor transparency and ensure rapid response, RDC Nepal realized that a Digital Management System (DMS) was essential for organizational resilience.
Supported by PIF, RDC Nepal executed a comprehensive digital transformation that went beyond software installation. It was a participatory institutional shift that included:

- **Diagnostic Review:** An internal audit identified operational bottlenecks in HR, finance, and procurement.

- **Custom Design:** Collaborating with IT experts, a cloud-based platform was developed specifically tailored to the realities of field operations and donor compliance.

- **Internal Ownership:** A dedicated Digital Task Force, led by the Executive Director, oversaw staff orientation and pilot testing, ensuring the technology worked for the people using it.

- **Institutionalization:** By developing a digital operations manual and conducting a series of training sessions for staff, the organization successfully transitioned to a new digital culture.

The implementation of the DMS across HR, Finance, Procurement, and M&E fundamentally changed how RDC Nepal operates. Outdated manual attendance and paper-based procurement have now been replaced by a centralized dashboard, offering real-time data and automated processes, ensuring a faster, more transparent workflow.

KEY ACHIEVEMENTS

- **40% Faster Decision-Making:** The organization has drastically improved its operational efficiency, shortening reporting timelines improving donor coordination and compliance.
- **Transparency:** Every transaction is now digitally traceable, eliminating duplication risks and strengthening internal accountability.
- **Staff Empowerment:** The initiative has boosted the digital literacy of field and central staff, bridging the communication gap.
- **Sustainable Operations:** By drastically cutting paper waste, RDC Nepal has integrated its environmental commitment directly into its administrative workflows.

RDC Nepal's transformation is just beginning. The organization is already planning to integrate its DMS with mobile data collection tools for real-time field monitoring and intends to share this good practice with peer organizations across the country. By embracing digital transformation, RDC Nepal has not only enhanced its reputation but has also ensured that every resource is used more effectively to maximize impact within the communities it serves.

BEE GROUP'S KNOWLEDGE REVOLUTION

BEE Group Executive Director, Dammar Sunar sharing about the organization's Knowledge Management System at a PIF event. Photo: Rachana Mukhia/Oxfam

For many NGOs in Nepal, the most valuable lessons are often lost in the transition from the field to the office. Without robust systems to capture them, field experiences remain siloed, making it difficult for NGOs to validate their impact or scale their successes. Bheri Environmental Excellence Group (BEE Group) recently overcame this hurdle, evolving into an organization with the digital intelligence to validate and replicate grassroots successes.

With strategic funding from PIF, BEE Group launched a transformative initiative to develop a Knowledge Management System (KMS) based on Digital Data, Monitoring, Evaluation, and Learning (DMEL) approach. Moving beyond a simple data repository, this dynamic platform transforms raw field data into replicable knowledge products. This shift not only strengthens institutional accountability but also guarantees that every community-led innovation is documented and used to inform future, evidence-based interventions.

Today, the KMS serves as a dynamic engine that captures innovations from the field and refines them into actionable knowledge products. This has shifted BEE Group into a learning organization where voices and field observations directly shape future strategy.

BEE Group's success stems from its inclusive six-step methodology, ensuring that knowledge isn't just stored, it is used.

- **Discover:** Identifying knowledge gaps through systematic assessments.
- **Harvest:** Capturing tacit knowledge from the field through interviews and discussions.
- **Design and Development:** Transforming knowledge and data into accessible formats such as podcasts, case stories, and digital reports.
- **Share and Transfer:** Disseminating insights through digital platforms, meetings and briefings, press releases, and exhibitions.
- **Application:** Integrating the lessons directly into new project proposals, organizational guidelines and policy planning.
- **Learning and Reflection:** Evaluating outcomes through internal reviews and sharing workshops to continuously improve the cycle.

The KMS has replaced organizational silos with a culture of sharing. By bringing together voices from every level of the project, the organization ensures that the lessons captured are transformed into practical tools that drive real-world impact. The KMS has integrated diverse roles of stakeholders to ensure learning leads to lasting social transformation.

- **Communities:** Beyond being beneficiaries, communities serve as co-creators, contributing vital indigenous knowledge and local innovations.
- **Donors and Partners:** Provide strategic guidance and resources necessary to sustain the KMS in addition to amplifying the organization's impact by connecting knowledge products to wider global networks.
- **Community-Based Organizations (CBOs):** Key partners for replication, scaling good practices, and feedback.
- **Media:** Function as amplifiers, translating success stories into public awareness and advocacy.
- **Local Government:** Acts as a strategic partner, integrating local learnings into provincial policy and district planning.

The impact of this digital shift is felt across every level of the organization. The MEAL Officer now ensures data validity for learning; the KM Focal Person synthesizes field experiences into evidence-based products, while the Executive Board uses real-time insights for strategic oversight. By embracing this digital transformation, BEE Group has built a digital culture that ensures resources contribute to a transparent and inclusive impact for the communities.

AN OVERVIEW OF PIF IN NEPAL

After a three-year pilot period in Nepal, PIF has validated the effectiveness of partner-led flexible funding. The initiative has proven to be a key driver in improving the leadership and governance structures of Oxfam in Nepal's NGO partners.

Some of the key achievements of the initiative involved:

Strengthened Organizational Governance: All partners developed, improved or updated their institutional policies and strategic plans, providing greater clarity and focus for their respective visions and missions.

Strengthened Management System: All partners upgraded to digital systems for their financial, human resource, procurement systems, significantly improving their overall operational efficiency and management performance.

Strengthened Leadership and Capacities: Key staff and board members across most partner organizations strengthened their expertise in proposal development, reporting, fundraising, and compliance management. Developing these core skills is essential for ensuring long-term organizational sustainability and excellence.

Increase in Resource Generation: Partners successfully developed numerous concept notes and proposals, often forming consortia to design collaborative projects. Several of these initiatives have already secured funding from both current and new donors. Furthermore, some organizations have moved beyond traditional grants by implementing resource mobilization strategies that explore alternative revenue streams.

Indicators for measuring success

1. Adequate policies, strategies and guidelines for managing institutional programs
2. Enhanced leadership skills for leading programs/sectors/networks
3. Strengthened internal control system
4. Capacitated staff for proposal writing and fundraising opportunity
5. Improved program quality
6. Expanded networking, learning and influencing
7. Documentation, communication, publicity and visibility

Strengthened Partnership and Alliance: The initiative has cultivated a powerful ecosystem of peer support. Beyond collaborating on joint funding bids, partners now frequently exchange technical expertise and management advice. This shift has created a deep sense of companionship and shared purpose among all partners.

Increased Organizational Visibility: Most partners modernized their digital presence by launching or updating websites and social media channels with consistent and engaging content. This increased visibility has enabled several organizations to join new consortia and networks and earn awards and recognition. Crucially, several partners have leveraged this improved reputation to strengthen their advocacy roles and contribute more effectively to high-level civic and development dialogues.

All 12 of Oxfam's partner organizations have highlighted that this initiative was instrumental in building their institutional confidence. As primary drivers of change, NGOs require the autonomy to strengthen their own leadership and governance. Flexible funding such as PIF empowers them to adapt to the evolving needs of marginalized communities while strengthening their ability to engage the government, defend civic space, and amplify the voices of the vulnerable.

However, despite the proven success of the PIF initiative, the future of such flexible funding mechanisms remains uncertain. Currently, most development partners restrict funding to core project activities, neglecting the essential institutional needs of their partners. To address this, partners have committed to advocate for a systemic shift by urging the Social Welfare Council, a government body overseeing NGO sector, to implement a blanket policy that mandates a 1–2 percent allocation of all project budgets as flexible funds dedicated to institutional growth. Strengthening the internal capacity of partners is not an overhead cost, it is a prerequisite for effective and impactful service delivery.