

# Portfolio Reviews

## OUTCOMES OF PORTFOLIO REVIEWS, JANUARY–SEPTEMBER 2014

Meetings conducted with Chris Stone and program/foundation staff

Program/PR Topic/PR Date	Lead Staff Contact(s)	Outcomes
Information Program: Digital Civil Liberties (January 9, 2014)	Vera Franz, Senior Program Manager	The review concluded that the Information Program's limited geographic focus on Europe and Latin America has been valuable and can continue, and that the program should explore opportunities for strengthening litigation capacity in Europe given the relatively strong legal framework there, including on data protection. The program should also consider complementing support for advocacy with support for policy research, given the increasing complexity of the civil liberties issues raised by new technologies, and should explore the viability of pursuing an "inside" strategy in its work on reforming the regulation of surveillance.
Information Program: Data for Advocacy (January 9, 2014)	Elizabeth Eagen, Program Manager	The review concluded that narrowly defining the wins and outcomes of data used in advocacy is foundational to the success of this newly minted portfolio, and that translation between technology, data science, and human rights advocacy is an early challenge. As human rights advocates often work with an out-of-date toolkit, the Information Program will look for instances where removing barriers to data and technology use can empower frontline organizations, and seek to know when data is adding value to the advocacy story.
Latin America Program: <a href="#">Drug Policy in Latin America</a> (February 24, 2014)	David Holiday, Senior Regional Advocacy Officer	This review revealed the challenges that remain in a field that is widely considered to be more robust than in other geographic regions (aside from the United States). Among the challenges were: Open Society grantees find it difficult to find funding beyond Open Society for drug policy reform efforts; organizations are often small or led by one or two individuals; grantees within a given country do not always agree on common strategies; and public opinion frequently lags behind reform efforts (the opposite of the situation in the United States.)
Open Society Justice Initiative: <a href="#">Anticorruption</a> (February 28, 2014)	Ken Hurwitz, Senior Legal Officer	The Open Society Justice Initiative should pursue its goal "to change the perceived general impunity for crimes of high-level corruption," by taking on the difficult cases others cannot pursue in order to create powerful examples of corrupt actors being held accountable and show the law to be an effective agent for accountability and punishment. Given the importance of considering the voice and identity of advocates and increasing the coherence and effectiveness of case-building work to better align with Open Society foundations and partners, the Justice Initiative will devote a significant part of the coming year to listening to colleagues in the African foundations and related programs, and their partners, including through a secondment in relevant office(s).
International Migration Initiative: <a href="#">Business Engagement in Asia-Middle East Corridor</a> (February 28, 2014)	Elizabeth Frantz, Program Officer	In evaluating a project demonstrating the effects of an ethical recruitment model, the conversation raised the need for strategy adjustments to more effectively influence recruitment practices in the Gulf. It also highlighted the potential to explore opportunities with the investment community as an ally and a target for business engagement.
Open Society Initiative for Europe: <a href="#">OSIFE in the Netherlands</a> (March 14, 2014)	Debora Guidetti, Xenophobia Fund Program Manager	The Open Society Initiative for Europe will continue to raise awareness on ethnic profiling (in collaboration with the Justice Initiative), strengthen home grown initiatives to fight illiberal tendencies (e.g., on Islamophobia) rather than doing research (At Home in Europe), and engage in societal debates (e.g. Black Pete) to encourage sustained attention to broader discrimination issues.
Education Support Program: <a href="#">Grassroots Organizing &amp; Social Mobilization</a> (March 17, 2014)	Kate Lapham, Senior Program Manager	The review confirmed that engaging social movements will continue to be central in the Education Support Program's strategy. The program learned that its approach needs to be adequately flexible to engage contexts in continual social and political flux and foster resilience to defend the right to education over the long term, as it may never be fully won.
Fiscal Governance Program: Natural Resource Governance* (March 24, 2014)	Julie McCarthy, Director	The Fiscal Governance Program initiated preliminary meetings with Oxfam to exchange strategies and understand priorities in the natural resource governance field. It also initiated conversations with the International Senior Lawyers Project to raise concerns over the level of its strategic ambition; this led the project to undertake a strategic and operational assessment, including a refresh of its board members, all of which is expected to lead to its development of more ambitious, coherent, and effective programming.
Arab Regional Office: Palestine/Israel International Advocacy (March 25, 2014)	Ammar Abu Zayyad, Director	The discussion homed in on the framing of the office's corresponding strategy and the often optical distinction between a focus on raising the cost of the occupation and ending it on the one hand, and on human rights advocacy and protection on the other. The review provided space for additional reflection on balancing geographic focus, balancing support to local and international actors, and the importance of pursuing new and innovative approaches to more effectively engage constituencies and opinion leaders.
Roma Initiatives Office: <a href="#">Zoralipe (Advocacy Grants)</a> (March 25, 2014)	Mensur Haliti, Program Manager; Edlira Majko, Program Coordinator	This review resulted in further calibration of institutional development grants: the office will continue supporting Roma advocacy organizations but also service-provision organizations that aim to establish mechanisms to protect their independence so that they can more freely express their views without fear that government decisions to cut funds puts their existence in danger.
Global Drug Policy Program: <a href="#">University Research &amp; Teaching</a> (March 25, 2014)	Joanne Csete, Deputy Director	This portfolio review assisted the program in identifying the strengths of its academic strategy, such as building capacity among a network of drug policy advocates and drawing upon the expertise of local faculty. Additionally, the review identified concrete strategies for the program's university-based work, including identifying and cultivating new relationships with academic scholars and sharpening the advocacy impact of new drug policy research that is produced.
Africa Regional Office: <a href="#">Citizenship Portfolio</a> (March 26, 2014)	Ibrahima Kane, African Union Advocacy Director	This review helped to question the office's theory of change, since working with high-level contacts at the African Union is not sufficient to realizing a movement that is critical to obtaining a protocol on the right to nationality. It also exposed some problematic aspects in the way the program had pursued collaborations and offered ideas for how to delegate more agency and authority to the office's partners.
Public Health Program: <a href="#">Access to Justice Work for People Living with HIV, Sex Workers, and People Who Use Drugs in Kenya, South Africa, Ukraine and Russia</a> (March 26, 2014)	Tamar Ezer, Senior Program Officer, Law and Health Initiative; Ralf Jürgens, Project Director, Law and Health Initiative	The program will increase its efforts to build grantees' capacity to document their work and link it to advocacy and fund leveraging, and will use its upcoming <i>Good Practice Guide</i> to reflect on effective practices and components critical to success in different contexts. In addition, the program will more deeply explore the extent to which government-funded legal aid schemes can address the needs of socially-excluded and criminalized populations through standard-setting, training, and monitoring; apply lessons from initial efforts to interest other funders in this work; and explore potential support from ministries of health for projects in the context of HIV and palliative care.

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Early Childhood Program: <a href="#">Step by Step Program</a> (April 9, 2014)	Sarah Klaus, Director	The portfolio review discussion revolved around the extent to which the national and regional early childhood NGOs established through the Step by Step Program are truly independent of the Open Society Foundations, and explored development going forward of a continuum, taking the NGOs one by one through a series of steps towards full independence from their current positions. This will involve continuing to provide NGOs with organizational development support to reduce their programmatic and financial dependence, as well as devolving intellectual rights and reconsideration of Open Society representation on governance bodies.
Human Rights Initiative: <a href="#">Accountability for Grave Abuses</a> (April 9, 2014)	Borislav Petranov, Director of Global Rights and Accountability	The portfolio review underscored the need to maintain support for the field for the long term, to maximize the impact of the limited resources available, and to address recent backlash against international justice and the continuing impunity enjoyed by some of the most powerful countries. The Advisory Board concluded that the initiative should retain its focus on supporting the documentation of high-quality evidence, domestic prosecutions, and victims' rights, but that, moving forward, its efforts must elevate new voices from all over the world seeking to end impunity.
Human Rights Initiative: Russia Portfolio* (April 9, 2014)	Iva Dobichina, Program Manager; Gregory Czarnecki, LGBTI Program Officer	The civil society infrastructure in Russia is under extreme pressure, and the ground is shifting so quickly that approaches to human rights work must be adapted just to hold ground. The initiative must ensure that its grantees can galvanize broader support for human rights domestically and internationally through strategic communications and advocacy. In addition, coping with the increasing risk and complexity of undertaking human rights work in Russia requires new skills for both the initiative and its grantees.
U.S. Programs Special Initiatives and Partnerships: <a href="#">Civic Core Portfolio</a> (April 11, 2014)	Bill Vandenberg, Director, Special Initiatives and Partnerships	This review, of a small portfolio of multi-issue grassroots groups that build political participation and leadership development within communities of color, assessed: (1) how the staff constructed the portfolio (nontraditionally, in 2012, during a time of significant U.S. Programs restructuring); (2) whether it sufficiently advances U.S. Program's broader priorities; (3) how staff assesses advocacy impact and looks beyond voter participation; and (4) what staff interventions occurred to support organizations that experienced programmatic or financial setbacks. The review concluded by shifting the staff away from prioritizing evaluation metrics to first refine what the "Civic Core" is, clarify common characteristics of the grantees, and identify the roles that each organization plays within political participation and leadership development fields.
Making the Most of EU Funds for Roma: <a href="#">Advocacy in the EU, CEE and SEE</a> (April 16, 2014)	Viola Zentai, Project Manager; Nadir Redzeqi, Project Manager	This program recognized that, in almost all cases of success, European and national-level advocacy and local-level operations had strong synergies. As a result, the program has reinforced the strategic orientation of local-level operations by focusing on the generation of projects with demonstration effects.
Scholarship Program: <a href="#">Core Concept-Closed Societies</a> (April 18, 2014)	Martha Loerke, Director	The Scholarship Programs used case studies of Uzbekistan and Burma that exemplify divergent experiences and outcomes of work in so-called "closed" countries in order to reflect on how different types of "closed" contexts led it to develop different types of scholarships, and to contemplate future work in new geographies. The discussion focused on staff agency, demonstrating the importance of identifying and reflecting on the relationship of staff actions to program results.
Think Tank Fund: <a href="#">Technological Innovation &amp; Data Visualization in Public Policy Research</a> (April 22, 2014)	Andrej Nosko, Program Manager	The Think Tank Fund will offer additional support to help think tanks and research-based advocacy organizations innovate and better use data visualization toward their advocacy and communications goals. Drawing on the lessons learned in this review process, the fund will (1) offer resident fellowships for designers or technology experts to "embed" with a think tank; (2) support data visualization experts and spread their best practices to enable a greater knowledge-sharing base; and (3) provide micro-grants to those who want to replicate tried-and-true approaches.
U.S. Programs: <a href="#">Campaign for a New Drug Policy</a> (CNDP) (April 22, 2014)	Andy Ko, Director of U.S. Programs Campaign for a New Drug Policy	The campaign has narrowed its goals in order to more effectively focus on (1) using the Affordable Care Act as a tool to significantly expand access to comprehensive substance use disorder services and to build the infrastructure for a health-based approach to drugs, and (2) supporting and building a base of sustainable community alternatives that demonstrate the possibility of a non-punitive response to drug involvement. It is also sharpening its field-building activities and developing a request for proposal process to identify community alternative efforts, both with the goal of more closely aligning its health and law enforcement aims.
Program on Independent Journalism: <a href="#">Freedom of Expression</a> (May 7, 2014)	Stewart Chisholm, Associate Director	Based on recommendations made during the review, the program has shifted away from providing a large number of project-based grants to focus on building strong leaders by investing significant funding and efforts into strengthening the capacity of key organizations working on media law reform, including both global leaders and regional partners in Africa, Asia, and Europe. The program is also building on its support to the Special Rapporteurs on Freedom of Expression at the UN and the Inter-American Commission on Human Rights by identifying and providing grants to organizations, which will be able to advance their recommendations on key freedom of expression standards over the coming year. Finally, the program hopes to finalize an assessment of other donors' engagement in supporting freedom of expression in early 2015.
Foundation Open Society Institute Pakistan: Education (May 8, 2014)	Nargis Sultana, Program Officer	The portfolio review confirmed the importance of the Pakistan foundation's goal to promote access to quality education for all children. The discussion concluded that there needs to be a stronger emphasis in the strategy on mobilizing citizens and working on building a movement that will be better able to hold the state to account for its duty on the right to education.
Iran Program: Defending Human Rights (May 8, 2014)	Anthony Richter, Director	Human rights defense work remains an important priority for the Iran Program, but should not be pursued to the exclusion of all other work, including work on supporting better policy outcomes such as support for a nuclear deal with Iran. Depending on the outcome of nuclear negotiations in 2015, a gathering could be organized to think about Iran outside of the U.S. and European frame.
Asia Regional Office: <a href="#">Impunity and Transitional Justice in Nepal</a> (May 23, 2014)	Martin Hala, Regional Manager, Nepal and Bhutan Initiative	The review identified the need for the program to (1) provide more support for national-level grantees in the development of administrative capacity and other internal mechanisms that would make these organizations less vulnerable to attack and intimidation by media or government forces; and (2) design the course of institutional development and structuring of the Alliance for Social Dialogue (ASD).
Open Society Afghanistan: Women's Rights (June 3, 2014)	Wazhma Rahimzay, Human Rights Officer	Based on the review, the Afghanistan foundation concluded that its emphasis on women claiming their rights overlooked relations between men and women, and that greater inclusion of men in women's empowerment—particularly in traditional and religious leadership positions—would increase the chances of sustainable change in conservative parts of the country. The discussion also focused on the extent to which the women's movement (and the foundation) has favored urban, English speaking, professional paid NGOs—"NGO-ization"—rather than voluntary movements, student movements, and rural community-based efforts.
Regional Policy Initiative: Conflict-Related Detention* (June 3, 2014)	Chris Rogers, Program Officer	The review reflected on lessons learned from the initiative's research and advocacy on conflict-related detentions in Afghanistan and Pakistan. Following the review, the initiative has continued its move toward a less confrontational approach to its detentions advocacy in Pakistan, relying more on local partners, and is working to transition the civil society coalition on detentions in Afghanistan to an independent secretariat over the next year.

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Open Society Fellowship: <a href="#">Choreographing Dissonance</a> (June 19, 2014)	Leonard Benardo, Director	The review provoked the fellowship program to think further about avenues for choreographing dissonance within the Open Society network, while continuing to identify forms of productive friction and interaction at Open Society. The program aims to expand Open Society's culture of dissonance by recruiting applicants from non-traditional backgrounds and by organizing events between staff and fellows for broader internal discussion and debate.
Information Program: <a href="#">Public Access</a> (June 24, 2014)	Melissa Hagemann, Senior Program Manager	The Information Program has seen success with a top-down strategy of advocating for policies to mandate public access to publicly-funded research. To complement this approach, the program should explore a bottom-up approach of working with the community to create incentives through the development of alternative metrics of academic evaluation for researchers to share their articles, in particular through the use of general support grants to the program's core grantees.
Documentary Photography Project: <a href="#">Production Grant to Photographers from Central Asia, the South Caucasus, Afghanistan, Mongolia and Pakistan</a> (July 1, 2014)	Anna Overstrom-Coleman, Program Coordinator	The project should develop its own sense of what photography can do in the world and use this as a filter to determine where and how to work, and under what conditions. In doing so, its focus should not be on the extent to which a project drives change on a specific issue—this is the role of local actors (grantees) on the ground; rather, capacity building, in and of itself, is a valid goal, as long as the project is supporting socially engaged artists.
Human Rights Initiative: <a href="#">CRPD Article 12, Restoring Legal Personhood</a> (July 16, 2014)	Tirza Leibowitz, Legal Advisor	The initiative should clarify its "theory of change"—what will bring about the change in attitudes, law, and practice necessary to uphold the legal capacity of persons with disabilities, and which tools and methodologies would lead to it? This strategy should guide the initiative to make tougher choices about its geographies and the grants it is giving or renewing, and in turn, the strategy should reflect such choices. The number of countries overall should be reduced, with a view, among others, to vacating resources to incorporate new constituencies (the elderly) and approaches (communications).
Higher Education Support Program: <a href="#">Academic Fellowship Program</a> (July 17, 2014)	Eniko Kovacs, Program Manager for Academic Fellowship Program; Sergiy Zaytsev, Program Officer	In order to increase the impact of the program's interventions, it should try to capture peculiarities of the country context, including the role of education authorities and licensing and accreditation issues. In evaluating the situation at the university and departments, the program should determine the presence of a strong, reform-minded department head who can use the program strategically, and only then go to the individual level, assessing the availability of Returning Scholars, their relationship with the department head, and their potential to contribute to overall departmental reform.
Eurasia Program: <a href="#">The Cotton Campaign</a> (July 18, 2014)	Alisher Ilkhamov, Program Manager-Uzbekistan; Jeff Goldstein, Senior Policy Analyst—Eurasia (OSI—DC)	The review noted that the cotton campaign has achieved major successes since 2010, but that this had led to new challenges. Participants agreed that, going forward, improved sustainability and public outreach should be prioritized.
Open Society Justice Initiative: <a href="#">Pretrial Justice</a> (August 11, 2014)	Martin Schoenteich, Senior Legal Officer, National Criminal Justice Reform	In launching this campaign, the Justice Initiative made a difficult double expansion of its work—from a national to a global focus, and from a narrow to a wider and deeper engagement—that may need to give way to a focus on achieving practical implementation of normative developments, good practices, etc. In turn, that shift will require the Justice Initiative to deliberate on the role it plays in achieving changes in the routine practices that undermine the delivery of pretrial justice.
Latin America Program: <a href="#">Human Rights Field</a> (August 14, 2014)	Heloisa Griggs, Senior Program Officer	Based on the significant innovation and accomplishments of the core grantees in this field, the program will continue to focus its support on forward-looking organizations that are working closely with governments to advance human rights and seeking to influence public opinion on challenging human rights issues. In addition, the program will foster experimentation with new approaches to advocacy and creative efforts to influence public opinion by a broader range of actors in the human rights field.
Arab Regional Office: Independent, Alternative, and Social Media in Egypt (September 8, 2014)	Joel Campagna, Senior Program Officer for Media and Information / Advocacy Liaison	The review concluded that the portfolio is too big, made up of different grants addressing different strategies, and might be broken down into two distinct components: independent media and technology for social change. Program work being considered to support the enabling environment for independent media, such as market analysis and audience research, should be spun off as separate concepts.
International Migration Initiative (in collaboration with the Latin America Program): <a href="#">Central America/Mexico Migration Corridor</a> (September 8, 2014)	Maria Teresa Rojas, Director	There were four issues raised that the initiative will address in its strategy revision next year: (1) developing a sharper "inside track" political strategy with the governments of the region; (2) defining a strategy for this corridor that includes the United States in coordination with U.S. Programs; (3) exploring opportunities for engagement beyond Central America, given significant migration trends in South America; and (4) developing a plan that maximizes the value of the donor collaborative that the initiative and the Latin America Program created with the Ford and Avina foundations, and determines Open Society's engagement in the long term.
Education Support Program: <a href="#">Attempts to Influence Agendas for Education Change at Multilateral Levels</a> (September 12, 2014)	Ian Macpherson, Director of Special Projects; Dierdre Williams, Senior Program Officer	The review confirmed that interaction at this level is often necessary to supplement the program's work. However, the program must be modest about the impact it expects to achieve, be specific about its choice of methods (e.g., board memberships, convening meetings and processes, building coalitions), and focus its involvements through clear, precise, time-bound objectives.
Africa Regional Office: Elections (September 19, 2014)	Ozias Tungwarara, Regional Manager for Research and Analysis	The review identified key elements of an analytical framework that the office should apply to each electoral context in order to define and prioritize threats to the integrity of elections it responds to. Building on the elements suggested during the review, the office will design a framework that will be applied a year or two before any election to decide which anticipated challenges to prioritize and how to deal with them.

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