

## Annex: Suggested Portfolio Review Discussion Questions

*Portfolio reviews are a mechanism for OSF to assess and learn from its work. The purpose is to determine whether our theories of change and the strategies developed to pursue them are yielding the intended results and allowing us to achieve our goals. The reviews examine our selection and deployment of the various tools available to us, including grant making, advocacy, litigation, scholarships, and fellowships. By focusing on our own work and achievements rather than using that of our grantees as a proxy for our impact, the process holds us accountable for our efforts to create change.*

The following suggested discussion questions are intended to help structure portfolio review discussions by focusing on certain elements addressed in the portfolio review document.

For portfolios that are linked to our strategy documents, the discussion's **opening question** will depend on the category of work that the portfolio reflects:

Support to the Field: Is our work making the field stronger, smarter, faster, better?

Pursuit of Concepts: Are we making progress towards the concrete goals described in the strategy?

The **discussion of the portfolio** should then center on three different levels:

Macro: What is the state of the field and the broad trends relevant to our aims?

Micro: Who are the significant players—both institutions and individuals—in the field? Include both those we support and those we do not.

Our work: Our work: What are we and our grantees and collaborators doing? Why are they worth backing? What is the logic underpinning our approach and the mix of tools that we selected? What contextual changes or advances/setbacks to our work have occurred?

Finally, the discussion should explore **what staff is learning** from the work being done in the portfolio:

- How have the different tools at OSF's disposal contributed to the portfolio's progress?
- What worked as expected? What surprises have there been that were not predicted in the program's strategy?
- What might have been done differently?
- What burning questions face this portfolio?
- **How will the program adjust its strategy in light of what it has learned from this work?** This should be the final question posed to the lead staff person and/or program director in the last 10-20 minutes of the review.