

Annex 1: Portfolio Reviews for Tools Other Than Organizational Grants

These questions are not meant to be comprehensive or mandatory, but are simply suggestions for adapting the model to suit the nature of your work.

INDIVIDUAL GRANTS

Rather than emphasizing what the individuals have achieved, reflect on what the unit sought to achieve.

- Did the design of the program serve to help you achieve your goals? Was the effectiveness of individual support borne out by results?
- Were there elements of the planning, implementation, or follow up that could have been more effective? How? Were supporting activities successfully employed to advance the program's aims?
- Which grantees demonstrate the success (or not) of the program and how?
- Did you strike a good balance between supporting individuals, supporting the field, and producing any benefit for OSF?
- Is alumni engagement critical to the long-term impact of this program? If so, has it been successful?

DIRECT ADVOCACY

Comment on your contribution as an advocate, even if you cannot attribute a specific change to your action alone.

- Did you target the right actors?
- Did you choose the right partners? Did they include relevant OSF units?
- Were your message framing and "ask" appropriate for the audience?
- Did you use the right mix of tactics?
- How did you cultivate contacts and leverage the power of your relationships?
- Were you prepared to seize opportunities that arose and shift tactics when needed?
- Was the decision to advocate in OSF's name justified?

With the benefit of hindsight, what would you do differently?

LITIGATION

Consider decisions made in preparing for litigation and implementing judgments, as well as any externalities.

- What was the overall goal of the project, and the objective of the litigation? Did the litigation lead to those outcomes, or were there any unintended consequences?
- What were your case selection criteria? How did you find cases, and why did you choose to litigate these?
- Did you deploy other tools to advance the project objectives, and were they appropriately chosen?
- What role did partners play to collaborate in the litigation?
- Was the time and the cost of direct litigation justified? Was the decision to take a more prominent role warranted?

OTHER TOOLS

Be sure to give similar thought to other tools that might have featured in your portfolio, including:

- Program-related investments (PRIs) / Impact investing
- Strategic communications
- Government assistance
- [New Enterprise development](#)
- Open Society Exchanges (e.g., [Youth Exchange](#), [Arts Exchange](#))