**RIO Staff Survey Report**

**Call for Concept Notes and Proposal “Advancing the Rights and Integration of Roma”**

**Usage of Grantee Portal**

*Staff*

Most of colleagues (64%) are aware that grantees experienced technical problems while 79% of concept note applicants and 55% of proposal applicants did. 50% of those who were asked for help think that they responded quickly and offered a solution to the applicant’s problem while 33% of colleagues think that they responded with some delay.

*Applicants*

67% of “concept note” applicants and 75% of “proposal” applicants responded that the staff responded quickly and offered a solution that solved their problem while 17% of “concept notes” applicants think that the staff responded with some delay.

**Responsiveness and consistency of information**

*Staff*

Regarding staff’s responsiveness towards grantees, we think that we were “very responsive” (71%) and extremely responsive (7%). Regarding the consistency of information provided, 64% of colleagues think that we were “very consistent” and 21% think that we were moderately consistent.

*Applicants*

The assessment provided by applicants is somewhat higher than our self-assessment: 22% of “concept note” applicants and 35% of “proposal applicants think that RIO staff was extremely responsive. Twenty two percent of concept note applicants and 35% of proposal applicants think that we were extremely consistent. None of colleagues chose this latter response option.

**Confidence in explaining RIO’s mission, goals, and programmatic priorities**

35% percent of colleagues feel very confident and 35% feel moderately confident about explaining to applicants RIO’s mission, goals, and programmatic priorities. A lower number of colleagues, 14%, feel extremely confident and slightly confident (14%) to explain RIO’s mission. In order to better explain to our applicants our values and strategy, colleagues suggested organizing meetings with organizations to present our strategy; visit organization more often; publish RIO strategy and a list of selected grantees on the website; be more transparent; use clear messages; and build quality relationships with applicants and grantees.

**Application Guidelines**

*Staff*

85% of colleagues (the first three option responses added) think that our application guidelines stimulated new ideas, provided a clear explanation of the goals and objectives of the call and were relevant for the applicants’ work and context.

*Applicants*

85% of concept note applicants and 75% in case of “proposal” applicants think that the application guidelines stimulated new ideas, provided a clear explanation of the goals and objectives of the call and were relevant for their work and context.

**Equal access to RIO’s funding**

*Staff*

35% of colleagues think that applicants have equal access to our funding, 28% do not know whether they have equal access or not, 21% think that some applicants are favoured, while 14% think that applicants with prior collaboration and experience with RIO are favoured.

*Applicants*

Regarding applicants, 31% of “concept note” applicants think that applicants have equal access to RIO’s funding, however, 36% do not know, and 31% think that some applicants are favoured. A larger percentage, 64% of proposal applicants think that all applicants have equal access to our funding, 11% do not know, and 23% think that some applicants are favoured.

**Quality of treatment**

*Staff*

Regarding the quality of treatment, 64% of colleagues think that we treated applicants “very fairly” and 21% think that we treated applicants “moderately fairly”. None of colleagues think that we treated applicants “extremely fairly”. Colleagues who think that the feedback we provided was only to some extent fair and reasonable explained that this is because colleagues have different interpretations of our strategy, approach and purpose of the call; the feedback is sometimes inconsistent and affected by the reviewer’s previous experience and knowledge of the organization; and that our feedback is sometimes too complex and difficult to be absorbed and understood by the applicants. Regarding the question on what we could do better to demonstrate that all applicants are treated fairly, most of colleagues recommended that we should ensure transparency, include accountability practices, and communicate with clarity.

*Applicants*

Conversely, 17% of concept note applicants think that they were treated extremely fairly and 50% think that they treated very fairly. Similarly, 60% of proposal applicants think that RIO staff treated them extremely fairly and 26% were treated very fairly. 13% of ca and 7% of proposal applicants think that they were not treated fairly at all. These are 100% of respondents who were rejected.

**Application process**

*Staff*

Most of colleagues, 71%, think that our application process is complex but easy to follow, 21% think that our application process is reasonable, and 7% think that the process is clear and easy to follow. Regarding the questions contained in the application template, 75% of colleagues consider that all information currently required is important for taking a decision.

*Applicants*

Compared to responses given by the staff, 34% of “concept note” applicants think that the process is clear and easy to follow, 47% think that the process is reasonable and 13% think that the process is complex but easy to follow. Similarly, to concept note applicants, proposal applicants rate more positively the application process than the staff, thus 41% think that the application process is clear and easy to follow, 17% think the process is reasonable and 35% think that the process is complex but easy to follow.

**Personalized rejection letters to concept note applicants**

*Staff*

In response to whether we should provide personalized rejection letters to applicants who submitted concepts notes, 71% of colleagues think that we should not, while 28% think that we should do so.

**Internal Review Process and workload**

*Staff*

62% of colleagues who participated in the review of proposals, think that the internal review process introduced for the advocacy call is “very effective” while 37% think that the process as extremely effective. Interestingly, at the same time, 62% of colleagues think that our current review process needs to be improved. Colleagues who think that the process needs to be improved mentioned that we need to develop more comprehensive evaluation criteria.

62% of colleagues think that the workload is appropriate and balanced and 25% think that this is not.

In response to the question on what colleagues like more about the new review process, among the most cited reasons are: diversity of views, greater transparency and accountability of our decisions; and the collaborative process which offers space for debate and learning. Regarding the least liked aspects of the process; colleagues mentioned the high number of interactions required with applicants, the sometimes unbalanced workload among colleagues, and protracted nature of the decision-making due to many discussions and questions between staff and applicants. Colleagues suggested having more reviewers, perhaps inviting external reviewers; communicate effectively our requirements, questions and suggestion during the evaluation process; develop better time management skills; and respect deadlines.

**RIO’s understanding of the issues the applicants’ proposals were seeking to address**

*Staff*

50% of colleagues think that RIO staff demonstrated a good understanding of the issues the proposals were seeking to address while 37% think that we demonstrated a fair understanding.

*Applicants*

Comparatively, applicants have a higher assessment of RIO’s knowledge. Thus, 46% of proposal applicants think that RIO staff demonstrated an excellent understanding of the issues that their projects were seeking to address, 20% think that RIO staff had a good understanding and 13% think that RIO staff had a fair understanding.

**Pressure exercised by RIO staff on applicants to modify proposals**

*Staff*

As the applicants developed their proposals, 37% of colleagues think that we exercised a lot of pressure (very pressured), and in a similar proportion 37% of colleagues think that we exercised moderate pressure on applicants to change their proposals in order to suit our requirements while 25% of colleagues think that we exercised extreme pressure.

*Applicants*

Comparatively, proposal applicants felt less pressured than we think they were: 13% felt extremely pressured, 6% felt very pressured and 33% felt moderately pressured.

**Support offered by RIO staff**

*Staff*

Regarding how supportive we were towards applicants, 75% think that we were very supported and 25% think that we were extremely supportive.

*Applicants*

Comparatively, 60% of proposal applicants think that we were extremely supportive, 20% think we were very supportive, and 6% think that we were slightly supportive.

**Skype effectiveness as a communication tool with applicants**

*Staff*

Regarding the use of Skype as a communication tool with applicants, 50% of colleagues think that Skype is a good medium for consultations while 50% think that Skype is a somewhat effective tool. Among the disadvantages of using Skype, colleagues mentioned the formal nature of discussions, Skype might not be the best tool to use when trying to build rapport with new grantees and applicants, and applicants and grantees tend to be less open via Skype discussions.

The majority of colleagues (75%) think that the quality of proposals improves moderately after Skype consultations.

**Suggestions to improve the application process**

Among the most cited suggestions by colleagues to improve RIO’s application process were the publication of the selection results on the website; simplify the proposal template; sent rejection letters in due time; find ways to better ask questions around governance, leadership, financial reputation and other information that is required for the docket review; communicate clearly; test the purpose of our calls and the relevancy of proposed issues for the applicants’ context.

ANNEX

Figure 1: Do you know whether applicants encountered technical problems when submitting their concept note or application through Foundation Connect?

Figure 2: Did applicants contact you directly to ask for help with their technical problems when submitting their concept note or application?

Figure 3: How effectively do you think you handled the applicants’ technical problem?

Figure 4: What communication channels did you use to contact or communicate with applicants? Check all that apply.

Figure 5: Overall, how responsive do you think we were towards applicants?

Figure 6: Based on your experience, how consistent do you think the information provided by us was?

Figure 7: How confident did you feel about explaining to applicants our mission, goals, and programmatic priorities?

Table 1: How could we help applicants gain a better understanding of our values, principles, strategy, and programmatic priorities?

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| 1. Use many communication channels to communicate a consistent message about our mission such as through call for proposals, RIO/OSF website, in person communication, Skype conversations, trainings, etc. |
| 1. much more fieldwork, publish strategy finally on OSF website |
| 1. First of all, sharing a written explanation; second, talking to them. |
| 1. With clearer communication, on their language if necessary. With less formal and more personal communication we would have a chance to explain our values and strategy. |
| 1. More onsite monitoring and convening |
| 1. More field visits, be more transparent about what we end up supporting and keep people updated about how those projects are going |
| 1. -publish the RIO strategy   -publish the selection/review process  -publish the nr of received applications, review criteria |
| 1. By visiting the organizations more often, coordinating among ourselves so we do not send out contradictory messages and by being more transparent. |
| 1. We should organize meeting with organizations to present our new strategy. The consultation meeting with the application helped to some extent, but this was only after they have submitted the concept notes and only with the ones that were selected to pass to the next phase. |
| 1. By demonstrating our leadership values and direction and by building quality relations through effective communication. |
| 1. Web site presentation and direct approach on country visits. |

Figure 8: Choose the statement with which you most agree:

Figure 9: Do you agree that every applicant has equal access to our funding?

Table 2: Please state the reasons you think that some applicants are favoured.

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| 1. The applicants that are somehow in touch with us are more exposed to our thinking. This may help some organisations simply because it could be easier for them to understand where we are coming from and our language. |
| 1. Better English or communications skills, more experience in application or concept paper writing. |
| 1. Hope for progress if some indicators signal that - Long years cooperation |

Figure 10: Overall, how fairly do you think we treat our applicants?

Table 3: Why do you think that the feedback provided was only to some extent fair and reasonable?

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| 1. It's difficult to generalise as the […] |
| 1. I think sometimes our expectations are too high, and feedback perhaps too complex in terms of their absorption capacity, so could be seen as 'not too reasonable'. |
| 1. It is inconsistent and affected by the reviewers' previous experience/knowledge of the organization |
| 1. Due to our different interpretations of our strategy and approach, including the purpose of the call |

Table 4: Why do you think that we didn’t make applicants feel valued and respected?

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| 1. My response concerns only […] |

Table 5: What should we do better to demonstrate that all applicants are treated fairly and that every applicant has equal access to our funding?

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| 1. Ensure transparency in everything we do. |
| 1. Find ways to publish the results to guarantee transparency. |
| 1. answering accusations of non-fairness by facts and admitting when we are wrong |
| 1. Overall I think that we did a good job but there were some particular cases in which we didn't. Luckily the applicants (RMBT from Ozd) had the chance to communicate it to us. |
| 1. I don't know. |
| 1. Something like the letter explaining change objectives could be shared at the concept phase. We might try to find ways to communicate more clearly our expectations regarding detail at the concept phase, since some organizations that are highly capable did not demonstrate their rationale, thinking and methods in the concept document and were therefore rejected. |
| 1. be transparent about the results and possible lessons to be learned from the funded projects   (naturally, this should be done keeping in mind the importance of trust between ourselves and grantees, but also our responsibility not to create tensions in the field by not being transparent), aim for a professional but not impersonal communication, to show our genuine interest |
| 1. more transparency about our strategy, review criteria and process |
| 1. I do not know. As far as I'm aware, accusations of unfair treatment are based on disappointment and gossip. |
| 1. I do not have an insider knowledge on our application processes, therefore I am unable to give an answer to this question. |
| 1. We should share more information about the projects we DO fund, but also accept that there will always be angry rejected people who see a conspiracy behind our decisions. |
| 1. Publish on the website the winning project with a short summary. If not on the website, in an email to all the applicants. |
| 1. Apply same set of principles to each and every application no matter the geography, context and idea |
| 1. Share our leadership challenge with them and engage closely with them to reinforce our relations. Also, its crucial to improve our accountability practices in RIO |

Figure 11: Choose the statement with which you most agree:

Figure 12: Do you think that in the future we should provide personalized rejection letters to applicants who submit concept notes?

Table 6: Do you think that in the future we should provide personalized rejection letters to applicants who submit concept notes?

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| Yes (Please specify why yes) | No (Please specify why not) |
| 1. If the quantity of applications allows us, we should provide individual feedback. | 1. It might not be practical considering the high number of concept notes and the time it takes to provide individualized feedback. |
|  | 1. Overload |
|  | 1. We have a large number of applicants and it would take too long. |
| 2. To help them improve their project plans or applications in the future. |  |
| 3. Each applicant will feel valued and will have focus for improvement. | 1. No, due to time constraints. |
| 4. To those who invested lots of energy and time in consultations with us for educational purposes. | 1. No it is unrealistic expectation with this amount of concept notes, maybe it is doable with a much smaller number |
|  | 1. we don’t have enough program staff capacity |
|  | 1. There are too many of them. |
|  | 1. I am not involved in direct communication with our grantees, but I assume we simply have time and staff limitations in providing personalized rejection letters. However, there are cases in which we were writing personalized letters and this is based on the judgement of evaluators. We should keep this practice if we think that both our program and the grantees gain a better understanding of the applicants’’ work and the context within which they and we operate. |
|  | 1. with the amount of work we do it is unrealistic to write personalized rejection letters to concept notes |
|  | 1. It is time consuming. We had more than 200 rejections; we do not have the capacity and time to respond to all of them. |

Figure 13: Did you participate in the review of proposals?

Figure 14: How did you deliver our feedback on proposals? Check all that apply.

Table 7: How did you deliver our feedback on proposals? Check all that apply.

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| 1. I was a co-reviewer. |
| 1. Within the first group of reviews only. |

Figure 15: Do you think that the internal review process introduced for the advocacy call is effective?

Figure 16: Considering the new review process, do you think that the workload is appropriate and balanced among colleagues?

Table 8: Considering the new review process, do you think that the workload is appropriate and balanced among colleagues?

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| 1. I think some colleagues were overloaded. |
| 1. Could have been field related. |

Table 9: What do you like the most about our current review process?

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| 1. The collaborative evaluation process which leads to thorough reviews. |
| 1. No-one is left alone with a proposal. There is place for debate and learning. Consultation with applicants is key, part of an empowerment process. |
| 1. It brings knowledge and people together. It gives a sense of team. It allows us to learn from each other. It's intensive. |
| 1. It helps create consistency in feedback and decision-making, raises common understanding of how to apply evaluation criteria. Collaborative |
| 1. the diversity of views team work |
| 1. Working together in teams |
| 1. It is time efficient and assessment effective |
| 1. Joint engagement of all colleagues and greater transparency and accountability of our decisions |

Table 10: What do you like the least about our current review process?

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| 1. It takes a long time to reach a final decision |
| 1. We have to learn to communicate in a way that applicants can understand and follow our terminology and thinking. |
| 1. It absorbs a significant amount of time |
| 1. It does take more time, which slows us down in other areas, due to limited number of people working on reviews. |
| 1. That we take too long to provide feedback and responses to the applicants |
| 1. be more concise with the questions in order to reduce so many back and forth |
| 1. workload can be sometimes not balanced |
| 1. Time pressure and lots of interactions required |

Figure 17: Do you think that our current review process needs to be improved?

Table 11: Do you think that our current review process needs to be improved?

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| 1. The share of the workload is more or less equal, but everyone is far overloaded. This is why the evaluation process is slowed down. We need to develop much more comprehensive evaluation criteria. In case of the voters' empowerment proposals it worked better. |
| 1. We should have more reviewers, and even use of external reviewers to diversify opinions, and hopefully speed up the turnaround. |
| 1. We have to make it more time efficient - some people go too much into depth and details |
| 1. We can make more use of Foundation Connect to record all the internal review process. |
| 1. -The core review group have clear direction or the purpose of the call   -Reviewers demonstrate inspiring leadership while interacting with other colleagues  -Practice effective communication  -Clarity on Grant-Decision  -Making Autonomy  -More open to different positions and opinions  -Establish respect  -Demonstrate greater abilities and discipline for the time management and deadlines  -Stay together and build joint arguments and disagreements on differences |

Figure 18: Choose the statement with which you most agree:

Figure 19: As the applicants developed their proposals, how much pressure did we exercise on them to transform them into proposals that were likely to receive funding from us?

Figure 20: How supportive you think we were in the development of applicants’ proposals?

Figure 21: Do you think that all information currently requested in the application template is necessary in order to make a decision?

Table 12: Do you think that all information currently requested in the application template is necessary in order to make a decision?

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| 1. More simplified information about the organization would be enough to get a sense of its capacity and values. |
| 1. More simplified on activities and stricter on outcomes and indicators. Maybe we should include also some of the questions regarding financial integrity, leadership...from our docket |

Figure 22: Which would be the best communication channel for delivering a rejection notification to an applicant?

Figure 23: Do you think that Skype is a good medium for consultations, especially when it comes to providing detailed feedback, creating a relationship of trust, and encouraging the applicant to reflect more deeply on the proposal?

Table 13: What do you think are the disadvantages of Skype consultations for us and for the applicants?

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| 1. They tend to be fairly formal |
| 1. As much as you can do Skype is virtual communication which does not have the advantages of face-to-face interactions. People tend to me more open in face-to-face communication. |
| 1. You can't use Skype in professional relationships that are recently built. There should be amount of confidence built before. |
| 1. No emotions so we can’t see how they react and not able to have informal convening talks. |

Figure 24: Generally, did the quality of proposals improve after Skype consultations?

Figure 25: Did you have enough time to prepare for Skype consultations?

Table 14: Please suggest how we could improve our application process.

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| 1. -ease the overload of the staff -find ways to publish results on the website to guarantee transparency -simplify the full proposal template -find ways to help applicants understand our terminology (objective, outcome, constituency, etc.) through the guidelines and/ or in the proposal template. |
| 1. In my case, I should make sure that the rejection letter with detailed feedback is sent sooner. |
| 1. I think we have already improved it in the near future. |
| 1. We can add or reformulate questions and Skype call preparation to better answer questions on governance, leadership, financial health, reputation for effectiveness and use of social media. Also number of staff and volunteers as a specific question asked by Chris in the organizational description was missing, and we had to go back. |
| 1. Do everything possible to prevent or solve technical problems, communicate closely so we do not send out contradictory or redundant messages about and during the process |
| 1. If we plan to translate the guidelines to local languages, we should do that on time. I think that the call is a very good experience for the team and we are better prepared now. |
| 1. Test our language before we publish our call and find the right balance in the gap between our and the applications understanding. test the purpose of the call and the relevancy of the proposed issues in a particular context |

Table 15: Please suggest how we could improve this survey or suggest questions that you might want us to consider in future surveys.

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| 1. Question 4: the option "we responded with delay but provided a useful answer could be useful. |
| 1. Try to design it differently than yes or no questions since it’s not all that we are doing black and white but sometimes gets other colours. Meaning - more space for complex responses like the qualitative infos on inclusive or exclusive tension in a particular context or conditions |

Figure 26: Is there anything else you would like to say?