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| Open Society Foundations |
| **PORTFOLIO REVIEW OF PARUVIPE (CHANGE)** |
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| **Roma Initiatives Office** |
| **10/13/2014** |

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| RIO’s ambition in this field is for grantees to influence the way governments make decisions concerning services, public spending, rights, freedoms, and protection from discrimination and violence. Paruvipe consists of three portfolios: advocacy grants, voter empowerment grants and the TTF-RIO joint fund. This portfolio review will focus on advocacy grants because we have been reforming our work in this area over the last two years, starting with decisions to focus on advocacy organizations and to reduce the geographic coverage from 15 countries to 3, and then to test new calls for proposals, new guidelines and a new selection process. This portfolio consists of 9 active grants: 7 grants to organizations and 2 individual fellowships. For this field, the approved budget for 2014 includes a total of 14 grants in Bulgaria, Macedonia and Romania. While our monitoring to assess impact is still insufficiently developed, some of the questions we are asking ourselves are:   * Why do we think we made the right choice of projects and organizations? * Did we communicate our expectations appropriately? Were our expectations too high, considering that the capacity in the field is limited and fragile? Were we careful to avoid imposing our ideas on grantees? * What are grantees’ limitations and what are our own? What should we have done differently? |

1. **OUR PLACE**

The situation of Roma in Europe has never been more visible. The European Union and governments have never made more declarations of commitments, and funding for socio-economic projects has never been higher or more readily available. And yet the lives of ordinary people have not changed for the better—in many instances they have become even worse. We observe that governments have been closing the space for non-governmental voices generally, and the design of funding from the EU and from the Norway Grants has intensified the weakening of already-weak Roma voices. There are, however, Roma organizations that recognize these trends and have the potential to respond to the new situation.

**Broad trends**

The policy-making environment has made the work of civil society much more difficult. At one extreme is Bulgaria, with instability due too-frequent elections, and at the other are Hungary and Macedonia, where the ruling parties have formed stable governments supported by overwhelming majorities for which dissenting voices make no difference. Advocacy work on Roma issues is an even more difficult task, as politically legitimized and publicly promoted intolerance against Roma strengthens obstacles to change.

Projects funded by the EU or the Norway Grants require partnerships with authorities and therefore create a sense of non-governmental organizations being extended arms of governments, which are seen as unaccountable and primarily responsible for the situation of Roma. Among many organizations we spoke with, “success”’ is measured by the number of projects and the amount of funding they have, and the partnership they have with the authorities. Impact on decision-making and change within Roma communities were not mentioned as indications of “success.” This “partnership” trend has absorbed many of the best among Roma organizations and advocates. Since the number of Roma and the gravity of the problems they face are hugely disproportionate to the number of capable advocates, the gravity of the loss of independent voices able to challenge the government is even greater. As one prominent Roma activist in Romania stated, “We want to be able to play both ‘good cop’ and ‘bad cop,’ but from 2009 to 2012 we were not being a ‘bad cop’… we were too busy with ESF projects.”

In the last two years we have noticed a positive trend among Roma leaders and activists, who increasingly realize that the “civic” or “activist” nature of work on Roma has declined. Comments such as “the civic in Roma organizations is mostly dead” and “Roma activism was killed by European Structural Funds” are common among leaders who have been working for more than 15 years. Today’s focus on EU funds, which requires sophistication in managing highly-complex bureaucratic requirements, does not attract people who come together out of a sense of civic duty to challenge injustice. It is not surprising that Roma organizations—which only a few years ago managed tens of thousands of euros per year, but today manage hundreds of thousands or even millions—need to grow bureaucratically and hire people with technical skills that many Roma do not have. To broaden awareness about these issues, we recently produced a [video](http://www.opensocietyfoundations.org/voices/investing-roma-led-change) that highlights some of these messages.

Roma leaders, activists and public intellectuals say that in order to revive the “civic” in civic organizations and reach beyond the current limits in influence on public decisions, Roma organizations need to find a better balance between being service-provision partners of authorities and critical voices on behalf of their communities. At this time we cannot really talk about the limits to the influence that Roma and pro-Roma organizations can have on public decision-making because advocacy as it is currently being done cannot lead to much more than it has already achieved. In the last few years we have seen our funding, and funding from others, used for poorly-timed meetings, repetitive reporting, recommendations that go unheard and low-level conference participation—all of which has been almost totally irrelevant for real decision-making.

The lack of ideas and skills for influencing policy decisions is very similar among non-Roma NGOs. Our recent joint call for proposals with the Think Tank Fund was supposed to attract prominent think tanks that, we believed, are much more proficient in attracting attention and influencing the opinions of decision makers. While they are certainly much more skilled in doing quality research and presenting findings, they turned out to be almost as weak in advocacy as Roma organizations—some of them, in fact, are less active and effective.

**Significant players**

Among the significant players in the field of Roma advocacy, we count organizations we support, organizations we do not support, other OSF entities, the Norway Grants, the European Commission and the Council of Europe.

Among the organizations we do not support, we would mention:

* The Resource Center for Roma Communities (CRCR) was created by the Soros Foundation Romania. CRCR manages Roma projects undertaken with European Social Funds and administers Roma grants for the Norway Grants.
* The “Impreuna” Agency for Community Development is not currently supported by RIO, but it was a long-time grantee. Led by a confident and articulate Roma manager, Impreuna has been highly visible due to its ability to attract EU funds and its channels to government officials. Its integrity, however, is questioned by some organizations in Romania.
* Amalipe in Bulgaria is the most prominent partner of the national government and local authorities in implementing EU funds.
* In Macedonia, InSoC is set to follow the path of Amalipe and its Romanian peers. InSoC is a partner of MtM in generating projects financed by EU accession funds.

These organizations are probably the most stable among those able to win EU-funded projects and to do work at the local level by subcontracting individuals and smaller organizations. At the moment, RIO does not provide grants to any of these organizations, but Impreuna and Amalipe have applied under the calls we published two months ago, and we are reviewing their applications at this writing.

Among the organizations we support, we consider the following to be significant players:

* National Roma Centrum (NRC) in Macedonia works on projects of the service-provision type, with a special emphasis on personal documents, health and education. NRC’s leader has been one of the most visible and vocal Roma activists at the national and international levels. He has also been involved in the Kosovo Roma crisis and refugee issues.
* Sonce, another important player in Macedonia, started 20 years ago as a self-help group for the middle-class and entrepreneurs among Roma in the town of Tetovo. The organization evolved into a strong national voice around the Decade of Roma Inclusion, especially when it was led by Nadir Redzepi, who now works for MtM. Today’s leadership, however, is set to completely revamp the organization along the lines of InSoC, Amalipe, Impreuna and CRCR, and we might reconsider further support for Sonce.
* The Equal Opportunities Association, a non-Roma organization in Bulgaria, has a strong background in legal advocacy and anti-discrimination work concerning Roma. It is a member of the government’s main consultative bodies related to its work.
* The Integro Association is a visible and stable network of local Roma organizations in Bulgaria with a good reputation in the field. It is a member of governmental consultative bodies on Roma policies.
* Romano ButiQ in Romania works to organize some 30 cooperatives involving 300 Roma handicraftsmen. It has also established a museum of Roma culture. Romano ButiQ’s leaders have high visibility: Ciprian Necula, a sociologist of Roma origin, is frequently interviewed by the media; and Nicoleta Bitu is an experienced and internationally recognized Roma activist.
* Amare Rromentza is one of the organizations that implement EU funds in Romania. It has a specific focus on Roma culture in education and it participates in governmental consultative bodies.

While Integro, Romano ButiQ and Amare Rromentza work on EU-funded projects, we support them because they are also visible, outspoken and critical toward government policy.

Orhan Tahir of Bulgaria is a prominent public intellectual and a lawyer by training. He is very vocal and takes highly critical positions on government policies and practices.[[1]](#footnote-1) Recognizing the significance and rarity of his stand, RIO has supported him as a fellow

Other OSF entities—most importantlyMtM, PHP, HRI and REF—are also among the major players that influence our work. MtM, PHP and REF support organizations of the type represented by CRCR, Impreuna, Amalipe and InSoC. HRI support human rights watchdog and litigation organizations that sometimes overlap with and, to a certain degree, complement those that we support.

The Norway Grants and the European Commission also provide funding to Roma organizations. The European Commission does not prioritize support for developing the organizational capacity or critical voices of Roma organizations. The European Commission provides funding to the Council of Europe with the aim of supporting public administration and Roma NGOs to implement the funds. The design of funding from the EU, the Council of Europe and MtM has, at best, provoked a shift among Roma organizations and leaders who used to raise critical voices (i.e., Romani Criss in Romania or Sonce in Macedonia); at worst it has paralyzed them with financial troubles.[[2]](#footnote-2).

**Our role**

RIO supports those who see good relations and partnerships with government not as their goal but as means to influence decision making. We are looking for unheard and nonconformist voices, those politically sidelined by governments and the European Commission. We want to support those who do not speak the same meaningless jargon that policy-makers want to hear but instead shed light on the everyday troubles Roma face due to dysfunctional policies and public services, and who propose new ideas that might bring change. We stimulate them to reflect on and learn from their own experiences in real political life—which is unpredictable and demands quick adaptation while keeping the ultimate goal in sight—rather than only to rely on experts and trainers.

1. **OUR WORK**

In 2011, RIO started reforming its strategic direction and grants management. In 2012, we decided to focus on advocacy projects and organizations, and to stop accepting applications on an ongoing basis and to solicit proposals through open calls instead. Parallel with these internal processes, Roma organizations in Romania and Bulgaria faced troubles due to their involvement in EU projects. In Romania, the government caused an existential crisis for NGOs due to long delays in payments. In Bulgaria, the media started a witch hunt against Roma organizations, blaming them for “the failure of Roma integration.” Consequently, the pressure on RIO to provide funding increased.

We faced a challenge regarding how to respond to increasing demand while at the same time shifting our strategic direction. On the one hand, by 2013 it was high time to communicate our new strategy; on the other, we could not do this due to the uncertainty of the new OSF strategy design process. Since advocacy was at the heart of our vision for the coming years, we decided to launch an advocacy call in 2013 that would serve multiple purposes: communicating the main direction of our future work, provoking new ideas, improving grants management, and finally testing the strength of the field and the assumptions underlying our proposed strategy for 2014–2017. This body of work later became the field known as Paruvipe.

**Grant making**

*2013 call for proposals*– This call, covering 15 countries and including extensive descriptions of our understanding of the context, challenges and hopes behind our decision to devote funding to advocacy, was the major vehicle for distributing our grants budget in 2013 (see Annex 1 - RIO advocacy guidelines 2013). The call was praised for its depth by professionals and activists who were not applicants[[3]](#footnote-3) and criticized by a few applicants who did not receive funding for including for too many “technical” words that they did not understand.

*Two-stage review* – To allow more time for applicants to shape their ideas, we developed a review process with a concept paper stage and a full-proposal stage. We received 252 concept papers and selected 33 of them for the full-proposal stage. From the three countries covered by this portfolio, we received 85 concept papers and selected 12 for the full-proposal stage.

*Further guidance* – To those selected for the full-proposal stage, we distributed a memo summarizing our reflections and learning from the concept-paper review stage, and reiterated our emphasis on: 1) change-based planning, rather than activity-based planning; 2) lifting up “participation-based thinking” to “influence thinking”; 3) minimizing the influence of the donor’s approach—i.e., “write what you think, not what you think we want to hear”; and 4) opportunity- or threat-driven advocacy (see Annex 2 - Message to pre-selected applicants).

*Surveys* – Interested in the impact this process had made on applicants and how their feedback could help us improve the application and review process, we sent an anonymous survey to all applicants. We also wanted to contrast their views with ours, so RIO staff also completed an anonymous survey with similar questions (see Annex 3 - Applicant survey 2013 and Annex 4 - Staff survey 2013).

*Workshop* – After the selection of the winning projects, we convened a workshop at which we aimed to learn from each other, as opposed to learning from a trainer. We highlighted that the fact that changes in the political environment require adaptation and also emphasized our determination to support learning and adaptation as key features of advocacy campaigns. These sessions were designed to advance thinking about power relationships and power holders, and about grantees’ sources of leverage (see Annex 5 - Detailed program – workshop for advocates).

*Progress review* – To learn about grantees’ progress toward intended changes and about changes in the environment that may affect their plans, we changed our reporting forms. Written reporting was also supplemented by Skype meetings and monitoring visits.

*2014 call for concept papers* **–** In 2014, we made additional adjustments based on the learning from the 2013 call: a) the text of the call was much shorter and the language was simplified; b) the call covered only three countries; and c) while space was left for applicants to define policy areas, we also specified a few areas on the political agendas of the three governments, which we had identified through interviews with knowledgeable people before we formulated the call.

Acknowledging the limits of the field, our review of applications was better calibrated. We had four main expectations from applicants: clarity of change objectives, explanation of the opportunity for change, innovation in methods and the formation of alliances to increase their leverage. We prioritized the first two of these in the concept-paper stage, while giving them a chance to clarify the rest during Skype meetings. The Skype meetings were better prepared than in 2013, with agendas and guiding questions sent out in advance. At this writing, the full proposals are being reviewed. We are also preparing for the next applicant survey and for a workshop for the winning projects.

*Fellowships* – We solicited two fellowship projects and this year also issued a call for Paruvipe fellows. The review of applications is ongoing.

***Coordination with the Norway Grants***

We invested much time in providing input to the Norway Grants, which had asked for our expertise, in the hope that we could convince them to help Roma NGOs with organizational development and advocacy instead of funding service-provision projects. However, this has not worked well. We have received almost no response to our input. The main reason for this is that the overall strategic framework and agreements with national Fund Operators for 2009–2014 were already set when our talks with the Norway Grants started—the machinery could not be shifted.

1. **MAIN LEARNING**

We have learned about the choices we made, about applicants’ limitations and our own, and about our internal disagreements, thereby establishing some basis for decisions that we will need to make soon.

**Why do we think we made the right choice of projects and organizations?**

We are confident about five choices, ambivalent about one and disappointed by three. Without taking credit or blame for the success or failure of these projects, we will provide here examples of the considerations that led us to being confident or disappointed in our decisions.

*Impact* – The campaign with the most impact was done by the Equal Opportunities Association, which aimed at six legislative amendments and succeeded in getting them all adopted by the Bulgarian parliament. The adopted amendments will improve the conditions for voting through the introduction of compulsory preferential voting. Among other changes, the amendments also improved conditions for the registration of independent monitors, improved procedures for the review of electoral rights violations and made it compulsory for there to be polling stations in the Roma settlements, which is a significant change because in many cases polling stations have been far away from the settlements.

*Leverage* – Apollo has not yet been able to influence the planning documents for EU funds on employment due to delays on the government’s side. However, they have succeeded to improve the position of Roma organizations. Before Apollo began its project, of the 614 organizations that belong to the eight Regional Employment Pacts, only one member was a Roma organization. Now there are 18 new Roma organizations serving as Pact members in five regions targeted by Apollo. Seventeen of the project coalition’s 22 members are Roma NGOs, and together they have a much better chance to influence the work of the government.

*Innovation* – The most innovative approach is being used by Amare Rromentza, which used the offer of a free time slot on a national television to produce a political talk show. Representatives of Roma organizations participated in the talk show with high-level politicians, including the minister of education, the minister of European funds and the minister for social dialogue. The prime minister’s written answers to questions from the Roma NGOs’ were read during the show, and the president also sent a written message. Before the show, Amare Rromentza organized meetings among Roma organizations to consolidate their views and formulate questions. The goal of the show was to push for public commitments by the government representatives, who are generally not accessible to Roma organizations. So far, they have succeeded to convince the government to create a body in the ministry of education where Roma organizations can represent the interests of Roma in the ongoing education reform.

*Organizational capacity and leadership* – The least progress has been made by the Roma Civic Democratic Alliance and the Center for Education and Social Development. Neither of these organizations has been able to address a leadership crisis that occurred after we approved the projects. In the case of the Center for Education, the EU-funded projects they implement have been their priority. Our fellow Marian Daragiu also has not managed to achieve a balance between his objectives for personal development and his advocacy campaign.

The small number of projects we decided to support have made us mostly confident about the direction and vision we set for this portfolio. Nevertheless, the overall process of interaction with applicants and grantees helped us see more clearly the limitations of the field and in our own work.

**What did we learn about the field?**

In the last two years, we met greater mistrust, less openness and more defensiveness among applicants than we had anticipated; greater than expected limits in advocacy capability and experience; and bigger challenges in expressing ideas in written English than we initially expected. We were also surprised by the low quality of proposals from former national foundations, long-established grantees and organizations in Macedonia.

*Greater mistrust of OSF and RIO than expected* – OSF’s transparency has been questioned for many years, mostly because we do not publish lists of the organizations and projects we support. (Until recently, there was a legal obstacle to doing so.) Besides this, the report from the 2012 external evaluation of our grant-making revealed a perception that some organizations are more privileged than others in getting our funding, especially because some “among the most privileged” had seats on our board or had “connections” to our board members or staff. Our survey after the 2013 call showed that we have not succeeded in changing that perception[[4]](#footnote-4) and also that the rationale has changed. Some respondents said that we favor Roma organizations over non-Roma organizations, that we favor organizations that have already established relations with RIO, and that we support “well-known” organizations rather than new, “unknown” organizations. Some applicants also challenged us on the transparency of the review process, saying that they would have been better prepared had the process been clearly described. Perceptions about a lack of transparency seemed to be the major reason for mistrust.

*Less openness to change and more defensiveness than expected –* Even an extensive call reflecting the discussions we had with Roma and pro-Roma activists did not have the impact we had hoped for. The organizations could not understand what was wrong with their work or the reasons for us requiring for different kinds of work—after all, OSF and other donors had provided them with support for many years based on the same type and quality of proposals. Years of support from OSF and their self-perceived legitimacy have both contributed to their sense of incontestable importance and entitlement to our funds.

Under our new approach, we asked applicants more questions about their organizations and proposals than they are used to OSF programs asking. This, combined with final decisions to decline funding, led some applicants to believe, especially in Hungary and Bulgaria, that RIO has an agenda against them personally or an agenda to shut down Roma organizations. We wanted to have a dialogue and explore ideas with them, but this was understood as negotiations or the deployment of force.[[5]](#footnote-5)

Applicants did not understand why we did not support them when their proposals were about “empowerment,” “grassroots,” “advocacy” and other fashionable words. Some of them concluded that RIO does not have adequate expertise in empowerment or a realistic sense of the grassroots. The mismatch between our assumptions about advocacy, combined with responses to their proposals that were different from those they are used to, caused a level of defensiveness that we did not foresee.

*Greater limitations in advocacy capability than expected –* Applicants justified their proposed projects by the social problems of Roma, which are well known, rather than by political and policy contexts in which they recognized opportunities to exercise influence. Most of the organizations are used to designing their advocacy activities according to our calls for proposals rather than according to opportunities in decision-making processes. Consequently, the objectives of their projects were either too broad (e.g., “contribute to the integration of Roma”) or simply stated as “empowerment,” which actually meant training. When questioned about the methods to be used in their projects, they could only list project activities. And many of the activities followed the research-report-conference pattern. Few applicants proposed projects that could overcome fragmentation among Roma organizations and isolation from mainstream movements.

*Not enough experience to build upon –* We recently launched a call in the field of Barvalipe to support the strengthening of Roma identity, provide leadership experience, and build communities of leaders and activists. In terms of quality of applications, the response to this call was the best we have had in the last four years—far better than our advocacy calls in 2013 and 2014. The major reason for this is that Roma organizations and activists have decades of experience working on issues of identity and activism and on arts and culture. This made us conclude that work on Paruvipe will be even more difficult, and even more important, than we had thought because the advocacy approach we are seeking is not yet part of the experience of Roma organizations—this probably applies to mainstream civil society, too.

*Significant challenges with writing out ideas* – First, we found that many organizations could not clearly explain their ideas in written English. We noticed a very significant discrepancy between what they wrote in their concept papers, proposals and interim reports, and what they said in Skype discussions. In verbal communication, they were more responsive and more articulate. Second, some of them did not feel comfortable writing about their connections, especially in public administration and political parties, that could help them have an impact on decision-making. Third, we recently learned that the precision required in EU projects is self-defeating for many organizations. EU regulations actually push them to be ambiguous in drafting proposals or to lie in their reporting.[[6]](#footnote-6)

*Low quality of proposals from former national foundations and long-established grantees* – To our surprise, we ended up rejecting the projects of the former national foundations in the Czech Republic and Slovakia, the ERRC, Romani Criss and the Gypsy Women Association. These projects were rejected at the very first stage of review due to their poor quality. In some cases, proposals from these organizations were worse than those submitted by recently-established organizations or grantees that have received far less funding from us.

**What did we learn about ourselves?**

*We mirrored the mistrust from the field.* Although it seemed to be the correct guess in many cases, we had the prejudiced view that organizations applied more because of the funding we offer than because of their own commitment. Our mistrust was manifested through a very tough review process, a very detailed application template and too many questions about details during Skype calls. Our bias against service provision prevented us from having a greater openness for gray zones between confrontational and cooperative relationships vis-à-vis the authorities. Mistrust also influenced our decision to include project objectives in grant approval letters, which we wrongly took as assurance that the organizations would maintain a focus on the objectives and not go back to activity-based work after receiving our funding. Half of the grantees in our survey said that the objectives stated in the approval letter did not reflect the discussions by e-mail or Skype.

*We did not communicate well enough.* With the intention to provide in-depth analysis of the field and to introduce new thinking and language, we did not find the best communication strategy that would help us to completely avoid the imposition of our ideas.[[7]](#footnote-7) Even though we had no other opportunity to explain our new strategic shift, our call was perhaps overly long, comprehensive and detailed. The language was too complex and abstract in some parts. Our big picture view contrasted with the very limited local perspectives of the applicants and led them to either reject abstraction by concluding that we “do not understand reality” or to adopt our wording to express the same thoughts that they had anyway.

*We initially took the wrong direction, but ultimately reached a good destination.* Some of the dilemmas we faced, and probably also a bad conscience about the high number of rejections, led us in the wrong direction during the review of full proposals in 2013. We initially thought that the rejected organizations should be given institutional development grants in order to help them develop advocacy capacity. However, during the strategy design process we realized that the development of organizations should be addressed by our Zoralipe (institutional development) grants. We decided that Paruvipe grants should be very limited and remain very competitive in order for us to support the best campaigns. We concluded that the most capable organizations are located in Bulgaria, Macedonia and Romania, from where around one-third of 252 concept papers and most of the approved projects had come. We decided that in these countries we should try to demonstrate a new way of advocacy that we and others can learn from and build upon.

*We made the wrong assumption about Macedonia.* In the 2013 call we did not select any projects from Macedonia and in 2014 we only selected one. We initially assumed that many good projects would come from Macedonia because the country has a higher number of active Roma organizations than other non-EU countries as well as the highest number of politically active Roma students and graduates who work in Roma organizations, political parties or public administration. We discovered that Roma students and graduates who get jobs in public administration do not actually work, even though they do receive salaries—a situation that allows the government to show that it has met the representation quota.[[8]](#footnote-8) At the same time, these people work in Roma organizations or in political parties that must cooperate with the ruling party in order to receive either EU funds or a share of the government jobs. Roma organizations, therefore, cannot take critical stances against the government.

*We did not consistently pay enough attention to the strength of the organizations.* We did try to assess if applicants had the capacity to implement a project, but not whether they were healthy in general. This led us to follow up inconsistently with organizations. For example, as a response to our questions, Equal Opportunities addressed conflict of interest issues and introduced governance changes even before their project was approved. On the other hand, we have not yet started a discussion with Integro about problems in their governance structure, even though our plan was to raise this issue throughout their project’s duration.

*We could get grantees to focus and improve a project, but we could not change their practices.* We also noticed that proper preparation—for example reading calls and preparatory materials for the workshop—was not practiced. Busy with fundraising and implementing ongoing projects, the organizations generally have not invested much time and commitment in preparing well. This was exemplified by the case of Amare Rromentza, which did not submit a better application in 2014 than it did in 2013.

Several questions provoked diverging views among our staff:

*Are our expectations realistic?* From the moment of drafting a call, we began debating whether our expectations were appropriate. The debates are ongoing. One set of “the bar is too high” arguments is that we have not invested in the field to develop the skills that what are expecting applicants to demonstrate, that we cannot expect too much from an already weak field (especially in terms of English writing skills) and that we do not provide much money as an incentive for organizations to change. The counterarguments are that we needed to set a bar against which we can better understand how far the field is from that level, that we cannot take responsibility for the weak capacity of the field, that we should support only the best because we want to show a new approach and confront inertia and that we can provide bigger grants if we are presented with bold ideas. Besides this debate within the team, at its September 2012 meeting the Roma Advisory Board expressed criticism about our spending and indicated that low spending signals bad management.

Despite this, we took the decision to set the bar high, where we want the organizations to be, and to seek the highest possible quality rather than insist on maximizing the number of projects and maximizing spending. The “Why do we think we chose the right organizations?”section above provides us with reason to believe that we made a good decision.

*Do we need external reviewers?* In the review process, we wanted to capitalize on the variety of perspectives among staff members and reduce bias by introducing co-reviewers. While this was highly useful and will be continued, we also realized that there is some mistrust of each other’s competencies. This has led us to inconsistency in interpreting expectations, inconsistency in review criteria, and probably inconsistent messages to applicants and grantees. We are not sure how many applicants were rejected as “collateral damage” from this problem.

Apart from this doubt among ourselves, the volume of 252 applications made us face the dilemma of whether we need external reviewers. Some of us thought that we needed external reviewers to help speed up the review process and increase expertise. The counterargument was that we should not miss a single opportunity to learn from the review process by giving such opportunities to consultants, who would actually play a staff role but take the learning away from OSF.

We decided not to engage external reviewers. We are still debating this, but conducting reviews without the participation of external reviewers has provided us with a great deal of learning and grant-making training. In any case, we still need to work on efficiency—seven months passed from the announcement of the 2013 call to the contracting of approved projects.

*Do we treat everybody fairly?* The staff survey revealed differences in our perception of our own fairness. Among staff, 29% stated that each applicant has equal access to our funding, while 36% believed that some applicants are favored. We have not discussed this thoroughly, but some of us assume that this perceived unfairness results from the knowledge of prior collaborations, previous exposure to our thinking, and good English and communication skills of some of the organizations we have decided to support.

1. **HOW ARE WE THINKING TO APPLY THE MAIN TAKE-AWAYS?**

Some improvements were made to the 2014 call, as described above, but there is more that we need to do. These improvements were mostly based on our reflections about what we should have done differently:

* We already improved the review of proposals by defining where we expect clarity from applicants and where we can accept ambiguities. In the case of individual fellowships, we realized that it is too much at this point to expect an individual to do advocacy alone. The most we can expect from fellows is quality research and outreach to the main players. To improve the ability to learn from the field and to provide better feedback, we need to react differently in the reporting stages. First of all, these exercises should be called progress reviews, rather than interim and final reporting. Second, we need to improve our own written assessments, since they are quite uneven at the moment. Third, we need to establish consistent feedback that would encourage reflection, adaptation and a comparative basis for learning. We have already started developing scripts for online and offline discussions as well as formulating questions that would help us to be consistent and to be seen by grantees as simply “asking questions” rather than interrogating. This should help grantees to better articulate their answers in English, and written notes by both sides could be exchanged and compared.
* We will need to engage with the organizations that implement EU-funded service provision and understand better how we can support them in safeguarding their organizational independence and gaining the stability to continue and eventually increase their critical views and role.
* To create models and experience that others can relate to and believe in, we would need to significantly increase public communication about the campaigns that we consider to be successful and show the difference that they are able to make.
* To strengthen the responsibility of grantees for their own development, we will launch a learning and development fund, planned within a revised budget for 2014, in which they will have a role in deciding upon appropriate training and learning resources as well as study tours that could help them learn from similar organizations and advocates. In conversations with grantees, serious media training has been identified as a priority. This would be necessary for them to improve their responses to media, their use of social media and their public speaking more generally.
* We will reconsider Macedonia as one of the target countries.
* We will need to consider whether our budget commitment for Paruvipe is too high, considering the low capacity in the field, and whether we should perhaps ask for less money.

1. Three years ago, Orhan attracted much attention by staging a protest by a group of young Roma with a “Stop EU funds for Roma exclusion” banner at a conference opened by EU commissioners and Bulgarian ministers. [↑](#footnote-ref-1)
2. Amare Rromentza and Apollo, among the best Paruvipe grantees, have failed to pay back loans to MtM and might be placed on OSF’s “do not fund” list. There is a good chance that we will not be able to continue funding these organizations. [↑](#footnote-ref-2)
3. One of them, for example, said that the call had analytical depth that he could use for his PhD work. [We are not sure if this is actually positive feedback.] Some said that this was one of the better analytical works about the situation of Roma he had read lately and definitely a new approach from a donor. [↑](#footnote-ref-3)
4. Of the survey participants who only participated in the concept-note phase, 32% thought that each applicant has equal access to our funding, while the same percentage of them thought that some applicants are favored over others. Among applicants invited to submit a full proposal, 65% thought that each applicant has equal access to our funding, and 24% thought that some are favored over others. [↑](#footnote-ref-4)
5. According to our survey of organizations invited to submit full proposals, 13% felt no pressure at all, while 7% felt “extremely pressured.” Thirty-three percent felt “moderately pressured,” while another 33% felt “slightly pressured” in a motivating and helpful way. In a few instances, applicants mentioned that our questions helped to stimulate new ideas and approaches. [↑](#footnote-ref-5)
6. 6 For example, if they say that they will organize a meeting of 100 participants and 90 actually come, they need to return money; if 110 come, they need to cover the costs of 10 participants from their own resources. [↑](#footnote-ref-6)
7. Our survey shows a split within the team regarding perceptions of the pressure we put on applicants. Those who thought we put “a lot of pressure to meet our requirements” is more than a third (37.5%) and “moderate pressure” within reason, while 25% felt we applied “extreme pressure.” No one thought that “no pressure” or “slight pressure” was applied. [↑](#footnote-ref-7)
8. The Ohrid Agreement’s provisions guarantee representation of minorities in public administration, and the government is required by the EU to report on the fulfillment of quotas based on census data. [↑](#footnote-ref-8)