**Portfolio Review: Scholarship Programs**

**Summary Notes from April 18th, 2014**

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On April 18th Scholarships held our first Portfolio Review with OSF President Chris Stone. Scholarships Advisory Board Chair Catharine Stimpson and Board member Rukmini Bhaya Nair joined the meeting by video, as did OSF staff (Audrone Uzieliene, Vadim Starkov, Helen Murray, and Joanna Oyerdiran) in London. Martha Loerke, Phillip Watkins, Joseph Glicksberg, Zoe Brogden, Matt Wilson, Rasjit Basi, Dan Sershen, and Daphne Panayotatos participated with Chris in New York.

Overall the exercise was instructive, albeit in unexpected ways. It was the first Portfolio Review of an individual grants program, and some of the instructive points derived from the different staff/grant relationship inherent therein. As we see in the Narrative, our expectation was to tackle the “closed country” designation that defines the main thrust of our strategy, our ‘core concept’ in OSF terminology. We presented case studies of our work in Uzbekistan and Burma to spark a deeper analysis of what “closed” means—each country representing divergent trajectories of political constraint as well as different scholarship program approaches. We also invited Joanna Oyerdiran (Africa Regional Office) to join us. With her expertise in Sudan and South Sudan, we thought a look forward to a ‘new’ geography, combined with a retrospective on 20 years in Uzbekistan and Burma, would elicit a useful and nuanced definition of what any kind of country designation means for our work.

Kate Stimpson opened the discussion by offering a concise set of points to consider:

1. What is the distinction between a “closed society,” an OSF term of art, and a “high need” society? After we have made that distinction, why privilege one over the other? There is an excellent case for letting context, situation on ground, drive us more than application of abstract categories (p. 9 of the Narrative).
2. When do we decide that the risks outrun the rewards? What are our criteria of risk? Is there a danger that a recipient of a scholarship that we fund, under the name and work of a partner, will be in grave danger?
3. Are we prepared to stay the course? Are we prepared to stick with a country for years, and not practice our version of a disruptive technology and move from country to country? If we do that, we may dissipate time, energy, and credibility. Our model for the value of staying the course is Burma.
4. Should we put more energy and money into alumni/ae networks and activities? To do so, I believe, would be to add value to our work.
5. Would it be wise to offer more scholarships to people in exile? This is possible without blurring our identity with Scholars at Risk and Scholar Rescue Fund by stressing our dedication to Open Society as such. Our evolving work with the North Korean students in exile might provide a model.
6. Operationally, wouldn’t it be a good idea to give more funding, where appropriate, into the educational centers that border the closed countries, e.g. Bilim-Central Asia?

Chris then focussed the discussion on the Burma case study. The points below summarize staff thoughts and reactions on the key issues that surfaced via the Burma ‘lens’.

1.  Chris was immediately interested to learn if staff had encountered stark moments of unintentionally positive or negative outcomes in administering programs for Burma, and if so, what happened? What action had the staff person taken that specifically generated a strong and unexpected result, and how did that experience impact the program? This approach proved difficult for the Scholarship staff present, because only two of us had directly worked on Burma programs. As well, to extract one key decision, attached to clear results, from a multi-year continuum of work, was challenging. The line of questioning therefore exposed a weakness in our topic choice: it was simply too broad and too conceptual—a better approach would have been to select one aspect of our Burma case alone, and hone in on key developments within a much narrower range of work. We learned that identifying and reflecting on the relationship of staff actions to program results is a fundamental goal of Portfolio Reviews with Chris. This is also something to be aware of as a possible difference between individual grant program administration and other OSF grantmaking.

2.  We posed questions in the Narrative intended to open a dialogue about the core concept of our strategy.  While this was clearly overly ambitious, Chris did pose a thought-provoking and pertinent question: going forward, what would we prioritize in terms of resource allocations, alumni initiatives or more awards?

The quick answer is that one should prioritize alumni work in countries where we have more alumni, and prioritize more awards in countries where we are relatively new. Rukmini Bhaya Nair pointed out, however, the sense of personal agency an award creates, and the necessity to expand communities of individuals who share that sense in any effort to move society forward. Another approach therefore is to *increase* awards in countries where we feel individual grants are still essential to building healthy open societies, and emphasize building alumni communities from the get-go in new countries, when we can work with much smaller grantee cohorts.

Fine-tuning our interventions in any country to an evidence-based assessment of OSF engagement in that country is a clear subtext to this question, and we take the point. Staying cognizant of the choices we’re making in calibrating awards against other uses of our resources has already started to influence our work.

3.  Scholarship staff need to think more across program boundaries—more people around the table should have felt they had observations about the decisions made for Burma.  A pre-review role play will improve on-the-spot critical thinking and our reflective practice.  In selecting topics for the future, we will hone in on one particular question to frame a deeper reflection and discussion of some fundamental areas of our programming. We need to pick apart our work more thoroughly, so that future topics use a more practical lens with which to inspect bigger conceptual questions.