**CONCLUSIONS from the portfolio review conducted by Chris Stone on July 16, 2014**

**Key takeaways**

* **The art of reflecting back: Falling short of achieving a certain goal does not necessarily mean failure but it does beg a thoughtful reflection.** Today we know that amending mental health laws is not an effective entry point to tackle legal capacity, as it brings up forced confinement and treatment within a medical model of disability in an unequal playing field, where psychiatrists are seen as authorities and there is little space to consider the alternative ways proposed by persons with psychosocial disabilities. We learned this, however, only through going through the process of supporting mental health reform in a number of contexts, and our choice to enter this field was based on what we could know then. The learning process was invaluable to our current strategizing on legal capacity.
* **Articulating our strategy: We must be more rigorous in assessing whether the grants that make up the portfolio add up to a strategy for political change.** We had described, on the one hand, the pivot toward supporting national-scale strategic and deliberate reform processes. On the other hand, we were challenged to explain a “geographic sprawl” in our grant-making, reflected by the spread of our portfolio over many countries (15)—in some countries we were supporting a single, small grant—which suggests grant making that follows opportunity rather than a calculated strategy to catalyze national-scale reform. Are we sufficiently rigorous in our analysis of what will bring about change? Have we articulated how the tools and methodologies lead to this change? Accordingly, should we be making tougher choices about geographies and the grants we give or renew?
* **Incorporating communications into our strategy: Communicating Article 12 to wide audiences is crucial to achieving change, which requires our deliberate investment in getting grantees to incorporate communications into their projects.** Through the portfolio review process we realized that, given that upholding legal capacity is about repositioning relationships between the individual and society (the family, the doctor, the banker, the employer), changing society’s attitudes through communications cannot be incidental to reform. It is actually the end goal of the reform sought. Equipped with this understanding, we cannot leave this issue to chance (as, in hindsight, we previously had) but must make conscious choices about how to support grantees so that effective communications and messaging of Article 12 to wider circles is integral to their projects.

**Adjustments to the portfolio**

1. In our strategy, we should clarify:
   1. our ‘**theory of change’**—what will bring about the change in attitudes, law, and practice to uphold persons with disabilities’ legal capacity and which tools and methodologies lead to it;
   2. **indicators** **of an intentional national-scale reform** which we have identified as a key tool through which to promote Article 12 CRPD implementation—what needs to be in place for us to support a particular process, without which we will not support it;
   3. **specific components** that are essential to achieving a reform, require focused work to figure out and will help inform other national-scale reform efforts—we have identified, for example, the importance of figuring out **relationships between the individual and third parties** (bankers, doctors) and this should be highlighted in our strategy and reflected in the choices of projects we support;
   4. how we will incorporate **elder people** into our strategy and align between the articulation of legal capacity in their context (for example in the evolving UN Convention and Intern-American Convention) and its articulation in the Convention on the Rights of Persons with Disabilities;
   5. how to respond to the challenges we have encountered around incorporating the voice of **people with psychosocial disabilities** andoperationalizing our acknowledgment that this constituency is less organized and may need more support than others;
   6. steps we will take to ensure that grantees’ work includes a **stronger focus on communications and messaging** to broader audiences.
2. This strategy should guide us to make **tougher choices** about our geographies and the grants we are giving or renewing, and in turn, the strategy should reflect such choices.
3. The number of countries overall should be **reduced**, with a view, among others, to freeing **resources** **to incorporate new constituencies** (elder people) and **approaches** (communications).