**FGP Portfolio Review Outcomes Summary**

**Portfolio: Open Budgets**

**Date: May 1, 2015**

**Participants**

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| **Name** | **Title/Program, Department** | **Role in Portfolio Review** |
| Julie McCarthy | Director, FGP | Co-lead |
| Mark de La Iglesia | PO, FGP | Co-lead |
| Vera Mshana | PO, FGP | Participant |
| Subarna Mathes | Learning and Impact PO, FGP | Moderator |
| Michael Sosa | PC, FGP | Participant |
| Melissa Betheil | PA, FGP | Participant |
| Cynthia Eyakuze | Director, Women’s Rights Program | Participant |
| Anthony Richter | Associate Director/Regional Director, Middle East North Africa, Southwest Asia | Participant |
| Vonda Brown | Senior Program Manager, Latin America Program | Participant |
| Daphne Panayotatos | PC, Strategy Unit | Observer/Participant |
| Chris Stone | President | Discussant |

**Summary**

This portfolio review raised a number of questions and afforded a set of rich discussions that will help FGP refine its strategy going forward. Some key points of discussion are listed below.

* In our open budgets portfolio, FGP opted to support by and large one organization, the International Budget Partnership (IBP), to consolidate the norm of fiscal transparency primarily with their open budget survey and index, integrate work with OGP and IMF, and support partners at the national level through grants and technical assistance.
  1. **A. Discussion** – There was a discussion regarding the tradeoffs of FGP’s support of one organization when strengthening a field.
     + On the one hand, it is widely understood that IBP, with OSF support, has effectively created the global open budgets field as we know it today, and continues to play a central role in providing technical assistance, capacity building, networking, and financial support to an increasingly sophisticated global network of local budget monitoring organizations.
     + On the other hand, the fact that IBP is the only major global organization today with deep capacity, experience, and resources to engage on budget issues at the global, regional, and local level is also a risk. If leadership changes and IBP takes a strategic/organizational turn for the worse, it is not clear who would step in to fill the breach. IBP has no real competition in the global INGO landscape, although groups like Oxfam America, Action Aid, and Development Initiatives are supporting various advocacy, capacity-building, and monitoring efforts on budgets and service delivery at the international and local level with varying degrees of sophistication.
     + Moreover, the group discussed the various implications for regional and national level organizations (who are in many cases partners of IBP and to whom IBP regrants) when the focus is on strengthening the one large INGO in this field. The group considered the possible implications when grant making strategies center around support to one organization which then becomes the primary re-granter – what happpens when donors do not form/strengthen relationships with smaller groups working at the national/local level?

**B. Takeaway** - FGP is considering how to expand and diversify the number of strong organizations in this field, with potential new emphasis on organizations at the regional/national level. This is particularly of interest given strong OSF presence in key regions/countries that can help FGP navigate new partnerships, and a desire to strengthen the muscle and sustainability of organizations at this level by putting them in more direct touch with international donors, rather than continuing to rely on INGOs to mediate those relations.

**C. Takeaway** – The portfolio review also prompted FGP to think of work in this space as part of a networked portfolio, given that several other regional programs and national foundations have supported IBP or IBP partners, and do, or could rely on them for various kinds of support in their strategies. FGP will use its upcoming thematic budget presentation to the global board to engage in more intensive conversations with OSF program and foundation colleagues on both of the above points.

* 1. **A. Discussion** – The review prompted an interesting discussion on IBP’s role (and the role of social accountability and other ways to examine the (re)building of social contracts in post-conflict/transition/crisis countries.

**B. Takeaway** - Discussions during the PR raised a specific opportunity to explore social accountability work in post-conflict/transition/crisis countries, including IBP work in MENA post-Arab Spring, as well as OSF work in Pakistan, Haiti, and Nepal post-earthquakes, and West Africa post-Ebola—and FGP has since begun exploring an internal conversation in this area.

**Summary Statement**

As a result of this PR, FGP is considering how to expand and diversify the number of strong organizations in this field, with potential new emphasis on organizations at the regional/national level. This is particularly of interest given strong OSF presence in key regions/countries that can help FGP navigate new partnerships, and a desire to strengthen the muscle and sustainability of organizations at this level by putting them in more direct touch with international donors, rather than continuing to rely on INGOs to mediate those relations. The PR also prompted us to think of work in this space as part of a networked portfolio, given that several other regional programs and national foundations have supported IBP or IBP partners, and do or could rely on them for various kinds of support in their strategies. FGP will use its upcoming thematic budget presentation to the global board to engage in more intensive conversations with OSF program and foundation colleagues on both of the above points. Discussions during the PR also raised a specific opportunity to explore social accountability work in post-conflict/transition/crisis countries, including IBP work in MENA post Arab Spring, as well as OSF work in Pakistan, Haiti, and Nepal post-earthquakes, and West Africa post-Ebola—and FGP has since begun exploring an internal conversation in this area.