**MEMORANDUM**

**Re**: Summary Document from ESP portfolio review (March 17, 2014)

**To**: Chris Stone

**From**: Kate Lapham and Daniel Pop

**Date**: March 29, 2014

**Cc**: Mary Metcalfe, Jordi Vaquer, Dan Sershen, Daphne Panayotatos, Hugh McLean

1.1 Chris Stone noted that ESP’s Portfolio Review Document (PRD) was well balanced in terms of number of grants, rationale and contextual information; he commended its clarity and coherence.

1.2. Kate Lapham’s introduction highlighted two core points. First was the importance of supporting communities to express the right to education in their own voice, according to their own contexts and priorities, oftentimes in defiance or in spite of global or ‘expert’ discourse. Second was the importance of building solidarity among different marginalized communities to identify shared concerns, coordinate action and amplify voice.

1.3. Chris Stone noted the evidence of solidarity and engagement of different groups was not uniform across the portfolio but rather mixed: evident in the Caucuses and Grassroots Europe work, for instance, but less so in the work in Tajikistan and Hungary. Kate Lapham agreed this is so in the Tajik case, explaining that organizations in Tajikistan are still dealing with primary issues of disability and have yet to reach out across different themes and issues, although the work is national, which is significant in a country with Tajikistan’s history of regional divisions. She added that the cross-border solidary work in the Caucuses had proceeded well but work with donors remains deeply challenging, contrary to ESP’s earlier expectations. Daniel Pop agreed that active solidarity has been mixed in Hungary: at the school level there have been clear results – for example the school-feeding programs – but there has not been a collective response to the new press restriction laws. This reflects the strong support for Orban’s government and the limited space that civil society occupies. ESP’s responses pointed to how the contexts in which OSF operates are in flux and highlighted need for ESP to continually question assumptions and realign objectives.

1.4 In response to Chris Stone’s question about why IZ remained a strategic partner – indicated by the level of funding provided – despite ESP’s reservations about working with them, Kate Lapham explained that the organization has become more engaged in service delivery than advocacy. They have managed to access a small amount of Austrian money to support the Caucasus work, not as much had hoped for, and they continue to play a useful facilitative role. They did not contribute effectively to the Grassroots work, however, and ESP no longer involves them there. IZ is, in a sense, captive to the dynamics of EU funding: their adapting to survive in that environment makes them a less-useful partner for ESP.

1.5 Chris Stone noted the range of tools described in the portfolio – including technical assistance, small grants, convening, advocacy, documentation, advocacy support – and asked about the meaning and mix of these tools. *Technical Assistance* describes support for the primary activities of the organization: linking expertise and resources in order to strengthen organization. *Advocacy Support* involves facilitating processes that would help to identify and understand the central questions facing an organization and helping them shape strategy and message; techniques include peer exchange, research and communications training. Chris Stone suggested that ESP consider the use of such terms carefully: *Organizational Development* or *Technical Expertise* is probably more accurate than Technical Assistance, for example. The program should be specific about the term ‘advocacy support’ and could avoid using words such as *platform*, which can be meaningless.

1.6 The discussion on Grassroots Europe, led by Dani Pop, included an explanation of the history to the project, how each participating country was identified, how the lead organization in each country was chosen on the strength of its ability to convene smaller organizations and build partnerships. Open calls for proposals and set criteria have proven more successful for identifying lead partners with ability and ideas than those that were purposively selected, for example.

1.7 Jordi Vaquer suggested that organizations that draw EU funding tend to start thinking and acting like the EU, this is a risk for OSF: he asked where the limits are to ESP’s engagement and how ESP might be able to avoid being affected by the toxic environment EU funding caused. Dani Pop explained that ESP has been careful to ensure that the lure of EU funds does not shape the interests of funding recipients in the Grassroots project by deliberately placing itself as a buffer between the EU and these organizations. In fact, the political objectives of the Grassroots project are to expose how EU funds become available in contexts where there are huge cuts in national budgets in order to change the debate and ensure that civil society does not simply become a service delivery mechanism within the EU. The reason for engaging EU funding is not because OSF needs the financial resources but because OSF needs to understand the mechanisms of EU funding and how to be an effective intermediary between the EU and grassroots organizations. Civil society is becoming corporatized in the EU as only the larger organizations tend to thrive. It is essential, therefore, for OSF to engage with the EU process; OSF risks becoming irrelevant and less effective in its strategies and advocacy to counter the overall toxic effect if it doesn’t.

Jordi Vaquer explained that the ’small project’ to establish an integrated school in Vukovar, where ESP has tried to bring in the experience of the Integrated Education Fund (IEF) from Northern Ireland, was not, in fact, small. It is part of a far wider symbolic act to demonstrate a non-sectarian future for Croatia and at the center of quite a large national and regional debate.

1.8 Chris Stone suggested that while ESP must assume the political contexts within which it operates to be temporary, these may turn out to be more permanent, reiterating the importance of reflection and the realignment of assumptions, analysis and objectives. Kate Lapham noted that the political context of Tajikistan is not likely to change in the near future, and OSF will need to be engaged over the long term if it is to have a broader impact. Dani Pop suggested that Moldova presents an important opportunity through engagement with the new progressive government, and while this engagement also needs to be long term, the window may not be open for long.

**Going forward**

2.0 In the next phase, Grassroots Europe will take a turn eastward to focus on Albania, Hungary, Moldova, and hopefully the Ukraine. ESP will focus more on the national contexts and ensure links are fostered with organizations whose primary work in not education, thus broadening the range of organizations and political weight behind the initiative.

2.1 Chris Stone remarked that the right to education will never be fully realized and that ESP will need to hone a strategy that recognizes this: this includes being reflexive, adapting to contexts in constant political flux, realigning to capitalize on moments that present themselves and preparing for potential backlash. The key insight is that ESP must actively work against becoming ossified in its approach.