**Open Society Scholarship Programs: Summary Document of Portfolio Review**

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**Participants:**

* Martha Loerke (moderator), Phillip Watkins (presenter), Chris Stone (primary discussant), Catherine Stimpson (discussant);
* SP New York Staff--Joseph Glicksberg, Zoe Brogden, Lesha Greene, Michael Paller;
* SP London staff (by video): Audrone Uzieliene, Vadim Starkov, Zarina Usmanova, Inga Pracute;
* Strategy Unit colleagues: Dan Sershen, Daphne Panayotatos
* OSF Fellow: Sherie Buell

This SP portfolio review focused on: Staff- vs. Grantee-Negotiated Academic Placements.

Phillip Watkins (PW) introduced the Portfolio Review (PR) documents and commented that the process of preparing for the review was rewarding in terms of evaluating established SP processes based on careful analysis of a variety of data. He noted that SP has drastically restructured and streamlined its programming in the last year in anticipation of a massive budget cut and geographic reorientation, resulting in two main program models. The Civil Society Leadership Awards (CSLA) and the Civil Society Scholar Awards (CSSA) offer support via two very different structures: fully-funded MA degree with staff negotiated university placement (CSLA) versus mobility (small grant) support for a grantee-negotiated university placement of doctoral students and faculty (CSSA). Each carries very different cost implications. PW posed the question at the foundation of the PR: Given staff-negotiated placement involve significantly greater cost (in both grant support and staff time) than grantee-negotiated placements, why would we continue the more expensive awards in a time of drastic budget reductions? He identified the value of the SP model, particularly of staff-negotiated placements for MA study, as the access it provides—access generally for individuals from countries marginalized by mainstream international education and access for persons from marginalized communities within those countries.. The PR evaluated whether discrete stages in the recruitment, selection, and placement process designed to provide access actually succeed in doing so.

PW also suggested areas for exploration in future planning, as SP prioritizes work in closed societies. He laid out questions that SP would find particularly fruitful for discussion, including:

* Are the new, streamlined program models (CSLA and CSSA) responsive to new challenges in our new geographies? Do SP “priority” countries present special challenges for access not addressed in past program design? What adjustments are likely to be necessary?
* Is our decision to shift completely away from negotiated doctoral placements final? Given past success of this model (but only under specific circumstances) might we consider this model under similar circumstances in the future?
* Is our claim that self-negotiated placement (and mobility grant funding) represents the best model for doctoral support also valid for faculty support?

The ensuing discussion moved in unexpected directions. For our first PR, SP analyzed the “closed country” designation that defines the main thrust of our strategy. In retrospect, this topic seemed too broad and too conceptual: Chris focused on one country example and his line of questioning seemed tailored to identify staff actions or decisions that carried either positive or negative, intended or unintended, consequences. This experience suggested that identifying and reflecting on the relationship of staff actions to program results is a fundamental goal of PRs with Chris. Thus, for our second PR we selected a topic we felt would rich fertile material for evaluating staff decision points and narrowly-defined program results. Our goal was to query how scholarship *processes* and staff engagement affect outcomes (here defined primarily as access).

Much of the discussion at this second PR, however, focused on topics at a broader and more conceptual level. We bring out the main areas below:

Discussion of outcomes over decision points

In this review, Chris seemed to focus not on staff decision points, but on outcomes, asking how SP would define success in light of the lessons learned in our research. He wanted to know how SP determines what success looks like, ‘beyond the inputs’ (referring to the financial resources and staff-negotiated placement efforts). He probed for information about the purpose of SP’s MA and PhD support, wondering whether such a focus is, for example, indicative of a commitment to provide professional training for university faculty.

For the purposes of this review, we had narrowly defined “outcomes” and “success” to be increased *access* for individuals from counties marginalized by international higher education. Evaluating the long-term impact of scholarship offerings was very much outside the scope of our intent. Success, in terms of our PR analysis, was defined by the degree to which our actions, decisions, and program models provided access to individuals otherwise unlikely to achieve admission to (much less funding for) international graduate programs.

Future study will evaluate more precisely what parameters we may use to define success or failure, positive or negative outcomes, and overall impact. An essential element of such focus, alumni analysis, figures very prominently in our ongoing and future work plans.

Relation of PR to strategy

We understand a primary goal of PRs is to suggest adjustments to a program’s strategy based on discoveries made during review. We also understand that at first glance, our focus on *process,* rather than long-term outcomes*,* would seem to preclude meaningful conclusions relating to strategy. However, a fundamental aspect of SP’s strategy is offering academic lifelines to individuals in constrained environments; in this sense, access for those otherwise barred from participation is, indeed, a successful outcome (but not the only or perhaps ultimate one). We stressed that the current PR was not designed to evaluate post-program impact, but rather to explore whether SP’s processes create access as hoped. In this sense, the PR validated the approach we have decided to take in closed, or “priority” countries.

Presentation of findings

The PR also taught us that SP staff need to improve their capacity to conduct data analysis. While we are not a research entity, and lack the time and mandate to generate comprehensive reports based on intricate data analysis to the level we might desire, SP staff need to be more cognizant of what data is provided in reports, how it is presented, and what conclusions are meant to be drawn from it. Some of our visuals proved confusing, and future reports should carefully balance between qualitative and quantitative data and illustrations should clearly communicate their intended conclusions.