Impact Fellowships:

Open Society Fellowship Portfolio Review

December 2015

**Introduction**

I

MPACT FELLOWSHIPS WERE INTRODUCED in the Open Society Fellowship Program’s 2013 strategy, with the aim of “assembl[ing] a cohort of fellows to attack a specific problem in a particular campaign or geographic area.” Previously, the recruitment of applicants and selection of fellows had drawn from the full range of work undertaken by the Open Society complex. Fellows completed their projects as lone agents, and though every effort was made to encourage working partnerships with other fellows, those engagements were largely the product of happy coincidence. Only rarely did fellows play a direct role in the formation or evolution of new initiatives. The value of the fellows’ contributions to the intellectual life of our network (while significant) was measured to a considerable degree in anecdotes and encomiums from colleagues.

But with the advent of Shared Frameworks and other initiatives intended to foster cross-network collaboration and introduce a time-bound sense of opportunity and urgency to our work, the fellowship began testing alternatives to the existing model. The format for recruitment and selection of Impact Fellows was designed in the weeks leading up to the Food Security/Climate charrette in Pretoria, in February 2013. Drawing on the same spirit that animated the new shared framework, the fellowship program sought to lower the transaction costs for groups of fellows to engage directly and productively with the Open Society network on an area of compelling interest. (Those areas of common interest are not limited to shared frameworks, as will be seen below).

Impact Fellowships represented the program’s first foray into the realm of concepts. Two characteristics defined these fellowships from the start: the **group (cohort) model** and the **joint focus on a common problem**. Each attribute carried certain assumptions—about group dynamics, about creating an environment conducive to intellectual innovation, and about how new thinking is broadcast within the Open Society network—that will be examined in this Portfolio Review. In addition, the fellowship’s decision to expand the scope of Impact Fellowships (in the form of Problem Statement fellowships), will be discussed in the concluding section.

**Original Ambition and Theory of Change**

I

MPACT FELLOWSHIPS WERE LAUNCHED in the belief that the new structure would make possible novel forms of collaboration and knowledge-sharing. The program’s prior experience with clusters of fellows—some of whom assembled spontaneously while others came together as a result of the ministrations of program staff—suggested that it was worth trying to replicate the preconditions for successful collaborations, thereby eliminating at least some of the reliance upon fortuitous circumstance.[[1]](#footnote-1) The language used in the 2013 strategy document was at once aspirational and (deliberately) non-prescriptive:

* “The program is prepared to engage with new Shared Frameworks, though the nature and form of that interaction will vary from case to case. [Discussions with colleagues] following the Pretoria charrette...weighed how the program might help the shared framework seize opportunities for individual grantees to maximize the value of available resources, fill in gaps in our knowledge, and identify those areas where OSF can make a distinctive contribution.”
* “An Impact Fellowship cohort might include, for example, an economist studying capital flows, an academic with expertise in land management, a litigator, and a community activist, each approaching the same problem from a different angle.”
* “A series of panel discussions on food security-related themes [led or convened by fellows] … would migrate from city to city (such as Nairobi, Dakar, Johannesburg, London, DC, and New York).”

Small groups of fellows, it was reasoned, would use each other as sounding-boards, giving critical feedback on ideas in formation. They would take part, on a systematic basis, in the deliberations of relevant Open Society units. Since their own circle of contacts varied widely, fellows would act as emissaries from several fields and ideological orientations, making possible ambitious forms of event-planning and expanding Open Society’s capacity to influence broader publics. Their eminence within their own professional groups would enable them to gather leading thinkers and practitioners to take part in workshops hosted by the network and its partners. Moreover, owing to the theatrical nature of debates, pitting fellows with different viewpoints against one another would help capture and hold the attention of Open Society colleagues.

*Working together [with Pablo Ortellado] helped us refine our research methodologies and approach our subjects in a much more comprehensive and complementary way, and to disseminate our preliminary results more broadly.*

**--Lucia Nader** (fellow 2015-16)

In addition, it was clear from the outset that Impact Fellowships would require a change in how fellows are recruited and selected. An open call was unlikely to reach the specific practitioner groups that could contribute most productively to the process. In November 2013, the program circulated an announcement of the new initiative, stating: “[P]articular focus will be placed on land governance issues, smallholder productivity, and improving access to markets.” Ideal applicants, the call explained, would include those “from such relevant fields as agronomy, climatology, finance, hydrology, resource management, development economics, land law, and regulatory policymaking.” This inventory of practitioner groups extended far beyond the customary reach of fellowship applications.

As stated in the program strategy for 2013, the fellowship hoped to retain the rigor of the existing recruitment and selection process while trying out new methods of targeted outreach: “Though Impact Fellowships will require that program procedures be altered somewhat to align with the goals of shared frameworks,” the strategy stated, “the fellowship will not in any way compromise its exacting selection standards nor surrender its mandate to challenge orthodoxies.” The document continued: “Working in tandem with colleagues will not entail taking direction from them. Potential themes for Impact Fellowships, and candidates for selection, will emerge from conversations with others around the network. But only those proposals that hold the promise to make OSF’s work more reflective and effective will be selected and supported.” The current review is also an occasion to see if the selection process worked as described here.

**Portfolio Definition**

T

HIS PORTFOLIO REVIEW WILL TEST the central conceit of Impact Fellowships: that prominent experts from diverse fields jointly attacking a specific problem from different angles can enhance the effectiveness of our interventions. For the purposes of this document, two groups of Impact Fellows will be evaluated: the first, consisting of three fellows (with a fourth joining post-selection) have had extensive interactions with the shared framework on food security and climate change in Africa; the second, involving two fellows, was chosen to advance thinking on the intersection between social protest movements and democratic practice.[[2]](#footnote-2)

The primary means of integrating Impact Fellows into the Open Society network has been through residencies in network offices and by arranging their participation in meetings, site visits, and conferences related to the themes of their fellowships. A sampling of those efforts appears in the appendices. In order to determine whether Impact Fellows interacted more seamlessly with the Open Society network, it is necessary first to establish a baseline of past practice and measure variance from that baseline.

It was nothing new for fellows to be resident at foundation offices, nor for them to make contributions to the thinking and planning of individual Open Society units. However, with the advent of Impact Fellowships, these grantees became immersed in these procedures to a degree that was quite distinct. Impact Fellows not only took part in the customary brown-bag discussions and one-on-one conversations with relevant colleagues; they also made themselves available to travel to periodic meetings, hosted by network colleagues. For the first time, fellows joined site visits to grantees and led workshops--in tandem with other colleagues, outsiders, and other fellows--that advanced the thinking of high-priority Open Society initiatives. In the sections that follow, the individual fellows themselves, and the forums in which their work was brought to bear, will be looked at closely.

Individual Grants: Food Security/Climate Cohort

****

James Murombedzi

*What Land Grabs Mean for Food Security in Africa* (2013-2014) \* Grant amount: $129,630

**The Project**: Murombedzi, a social scientist and forestry expert, looked at how large-scale land concessions affect rural farmers and local governance in Ethiopia, Liberia, and Zambia, a reversal of the common framing, in which failures of governance are seen by critics as leading to land “grabs.”

Leonard Wantchekon

*The Political Economy of Road Building in Africa* (2014-2015) \* Grant amount: $130,750

**The Project**: Wantchekon, an economist, examined the complex relationship between rural infrastructure availability and food security in Sub-Saharan Africa.

Tim Wise

*On the Maize Trail: New Perspectives on the Global Food Crisis* (2013-15) \* Grant amount: $144,876

**The Project**: Wise looked at food, fuel, and financial markets in the context of a changing climate, by tracking the trade in maize from the United States to Africa and Latin America.

Euclides Gonçalves

*Democracy, Citizenship, and the Bureaucratic Paper Trail* (2015-2016) \* Grant amount: $113,150

**The Project**: Gonçalves, a social anthropologist, studies the creative ways citizens and government officials in Mozambique put bureaucratic documents to work to advance their own interests.

**Selection Process:** Open Society Fellows are customarily chosen at the two annual meetings of the program’s advisory board. To align with the flexibility and speed inherent in the shared framework process, the program decided (amid some dissent) to experiment with an accelerated selection approach. In the waning months of 2013, a targeted call for proposals was circulated via the Africa foundations and other intermediaries to identify proposals specifically related to the food security shared framework. Both Murombedzi and Wantchekon were encouraged to apply, on the strength of strong endorsements from Open Society colleagues, who called attention to their differing positions on matters of economic development and foreign investment. Each applicant was chosen at a special selection meeting, convened by videoconference, at which only one proposal was considered. After being chosen, they began their projects in time to take part in shared framework meetings in early 2014.[[3]](#footnote-3) (Wise and Gonçalves were chosen at regular, biannual selection meetings.)

**What Impact Fellows did:** As Appendix I shows, Impact Fellows have taken part in all four biannual sessions of the food security shared framework since April 2014 (though never all at the same time), as well as site visits, monthly calls of the shared framework, brown-bags, and other events. It was hoped that their attendance at such gatherings would enable to colleagues to benefit from expert input as the shared framework considered forthcoming dockets and other forms of advocacy. Leonard Wantchekon offered valuable (and critical) commentary on OSIEA’s proposed docket on pastoralism. These meetings have also led to deeper forms of engagement. (Tim Wise, for example, has begun a consultancy managed by HRI and OSISA on land governance in Mozambique, Malawi, and Zambia, and James Murombedzi chaired a workshop on land valuation at a UN-sponsored conference on sustainable development in October 2015, discussed below).

**What we learned**: Impact Fellows have been warmly received at these meetings, and their feedback on dockets and other framework-related processes has been eagerly sought. Wise and Murombedzi, in particular, have come to be considered an integral part of the shared framework. “Having James and Tim in the room when we were navigating areas of work that were new to us gave us the conceptual clarity we lacked,” said Masego Madzwamuse, Economic Justice Program Manager at OSISA. “They brought to us in a quick manner what it would have taken many consultants—and a great deal of reading—to learn.” (Wantchekon has proven to be somewhat more reticent in his interactions with the shared framework than the other fellows, and Gonçalves is too new to the process to draw reliable conclusions from his tenure). In hindsight, lack of familiarity with the Open Society network may have complicated the integration of new fellows to a degree that exceeded expectations.

In the future, more work will have to be done to prepare fellows for the rigors of working together and to speed integration into the network. Moreover, most Impact Fellows continued to rely on fellowship staff to mediate with network colleagues, and expectations that fellows would be able to act as autonomous conveners of an ambitious series of discussions arising from the shared framework may have been overstated. Finally, the four fellows were broadly scattered geographically, and it was challenging to bring them together to interact with one another on a regular basis.

Individual Grants: Social Protest/Democratic Practice Cohort



Lucia Nader

*Solid Organizations in a Liquid World* (2015-2016) \* Grant amount: $133,500

**The Project**: Nader, a leader of Brazil’s NGO community, is looking at how rights-based groups in Brazil, the United States, and Europe are reacting and adapting to pressures from recent mass protest movements.

Pablo Ortellado

*The Paradox of Street Protests* (2015-2016) \* Grant amount: $132,350

**The Project:** Ortellado, an expert in public policy, is looking at why protest movements Brazil, Europe, and the Middle East habitually reject representative government while simultaneously demanding better services from the state.

**Selection Process:** Nader and Ortellado, both Brazilians, applied for the fellowship separately—albeit with proposals on similar themes—in the fall of 2014. Interest in social protest and democratic practice had been growing at Open Society for some time, and the topic seemed ripe for further elaboration by Impact Fellows. The two applicants knew each other only slightly, but given the timeliness of their projects, the fellowship decided to encourage them to combine efforts and consider how their work might dovetail. (See their joint letter to the fellowship advisory board, Appendix 3). Program staff felt that their different occupations and perspectives—Ortellado, an academic, was skeptical of the protestors’ capacity to translate gains into real political power, while Nader, an activist, criticized leading NGOs for failing to adjust to the demands of the “street”—made them well suited to the rigors of an Impact Fellowship.

**What Impact Fellows did:** As Appendix II indicates, much of the fellows’ work on protest movements took place outside of Latin America. A two-month-long residency at OSIFE in Barcelona enabled them to expand the scope of their projects to take in the dynamic and shifting protest scene in Europe. Nader formed an informal advisory body (which included several Open Society colleagues) to provide feedback on her research, and she wrote six pieces for *Open Democracy* and in the Brazilian media on the complex interactions between protest movements and NGOs. With colleagues from OSIFE and HRI, the fellows organized roundtables in London and Barcelona on how funders are reacting to pressures from the “street.”

Both fellows also co-wrote articles in the Brazilian media on their research into similarities between left-wing and right-wing populist movements in Brazil. Finally, as seen below, they traveled to Tunis in November 2015 to take part in the Arab Regional Office board meeting and visits with grantees.

**What we learned:** The fact that both fellows are Brazilian (and were acquainted with each other’s work) may have helped them overcome some of the challenging social dynamics encountered by the other group of Impact Fellows. Active buy-in from directors and staff of the Latin America Program and OSIFE no doubt was also of significant value. Since their fellowships are ongoing, it remains to be seen how successful they will be in sharing their knowledge and insights with the broader network.

Key Events Involving Impact Fellows



Fellows James Murombedzi and Leonard Wantchekon discuss their

upcoming debate “What is the Best Way to Build a Road?”

Nairobi, October 2014.

Food Security/Climate Change Shared Framework

Biannual Meetings

OSIWA Dakar (April 2014) \* Participating fellow: James Murombedzi

OSIEA Nairobi (November 2014) \* Participating fellows: James Murombedzi, Leonard Wantchekon

OSIWA Dakar (April 2015) \* Participating fellow: Tim Wise

OSISA Cape Town/Stellenbosch (October 2015) \* Participating fellows: Tim Wise, Euclides Gonçalves

**Purpose**: To enable Impact Fellows to be present as the shared framework was discussed and strategized; to allow colleagues to learn of the fellows’ current work.

**Results**: In the meetings listed here, fellows played an active part in discussing framework strategies. Murombedzi, Wantchekon, and Wise offered critical feedback and advice on proposed dockets. OSISA’s Masego Madzwamuse recalls that “it was James [Murombedzi] who gave us the heads up about the impending Zambia Community Land Rights bill,” which became a focus of OSISA’s grant-making. In Nairobi in 2014, Murombedzi and Wantchekon squared off in a lightning debate on the topic “What is the Best Way to Build a Road?” (Briefly, Wantchekon argued that rural infrastructure in much of Africa is so inadequate that governments should be empowered to use whatever means are available—including eminent domain—to build roads linking farms and markets, while Murombedzi believes small-holders and pastoralists must be able to make decisions affecting their own lives and livelihoods.)

**Lessons**: Though there were challenges in bringing fellows up to speed with the thinking of the core group, most colleagues involved in the shared framework attest that having fellows present at these meetings has been of real value. As Wise put it, “The incipient nature of the shared framework made it more difficult to fit into it, but the evolving nature of the work offered opportunities to help shape it.” The debate format tried in Nairobi was entertaining and brought out matters of substance. But perhaps the greatest challenge for Impact Fellowships has been determining how to transmit and preserve the learning generated by fellows in a form that can be readily used by colleagues. This concern is compounded for those fellows whose work cuts against the grain at Open Society. Wantchekon, for example, is (guardedly) supportive of market-led development in Africa. During his fellowship he researched and co-wrote an essay (“The Curse of Good Soil? Land Fertility, Roads and Rural Poverty in Africa”) that showcased his academic style—empirical, contrarian, and generally supportive of foreign investment in rural infrastructure. It is not clear that his viewpoints—however persuasively they were articulated, in person or in writing—could easily be easily incorporated in our work.

For reasons that are open to discussion, it has also proved more difficult than expected to recruit applicants and develop proposals from outside the customary Open Society circles of NGOs, the academy, and journalism.

Food Security/Climate Change Shared Framework

Site Visits



Fellow Tim Wise on site visit to Chanyanya Small-

holders Cooperative Society, Zambia, August 2014.

Zambia (August 2014) \* Participating fellow: Tim Wise

Mozambique (June 2015) \* Participating fellow: Tim Wise

Cape Town/Stellenbosch (October 2015) \* Participating fellows: Tim Wise, Euclides Gonçalves

**Purpose**: To enable colleagues from the Human Rights Initiative, OSISA, and the Justice Initiative to take advantage of the expertise of Impact Fellows during site visits as organizational grants on the shared framework docket were evaluated.

**Results**: Wise’s presence on the visits to Zambia and Mozambique contributed an expert’s perspective to conversations that might otherwise have normally focused on the minutiae of grant-making. Says Madzwamuse: “At a time when we were grappling with how [factors such as] food prices, global trade, and the regulation of seed patents were affecting food security, Tim helped us understand these forces concretely.” Wise and Gonçalves have also jointly researched land acquisitions resulting from a massive, three-country agricultural development project called ProSavana in Mozambique’s Nacla corridor.

**Lessons**: The program’s ambitions to have all Impact Fellows routinely join site visits and scoping missions have not panned out as planned. Since they are advancing their own projects as they track the work of the shared framework, fellows are often unable to break away from their commitments to join the food security team.[[4]](#footnote-4) Building a portfolio around individual grantees comes with a fair amount of risk, as the idiosyncrasies of people’s lives can thwart even the most purposeful advance planning. In site visits, as in other aspects of the Impact Fellowship experiment, greater success is achieved when fellowship program staff are present to guide fellows through the inter-personal and logistical complexities of the shared framework.

Food Security/Climate Change Shared Framework

Workshops



Fellows James Murombedzi (third from right) and Euclides

Gonçalves (right) with Open Society colleagues and other

panelists at expert discussion on land valuation and food

security in Africa, Victoria Falls, Zimbabwe, October 2015

Victoria Falls (October 2015) \* Participating fellows: James Murombedzi, Euclides Gonçalves

|  |
| --- |
| **Purpose**: Murombedzi chaired a fellowship-sponsored expert panel (“The True Value of Land: Smallholders, Pastoralists, and Food Security in Africa”) on land valuation at UNECA conference on sustainable development and assembled a diverse panel of experts. The premise for the session originated on an OSIEA site visit and was developed by colleagues at OSIEA and the Justice Initiative, as well as the fellowship. Participants were asked to consider how local, national, and global markets assign monetary value to agricultural and pastoral land, whether those valuations take adequate account of the land’s economic utility to those who use it, as well as its abundant contributions to social and cultural life and environmental sustainability; and whether it is desirable (or even possible) to arrive at a “fair” market price reflecting its true worth. |

**Results**: To the rather straightforward question of whether having more data (in this case, about land prices) is good for smallholders or not, participants generally divided along ideological lines. Some felt strongly that any intervention that could accelerate the sale of land by small farmers is misguided on its face, while others argued that what those communities need most is information (and the right to act on that information). A consensus did emerge, however, that evaluating the data that currently exists—however fragmentary—would help identify the circumstances (if any) under which land valorization could be made beneficial to small-holders.

**Lessons**: In the course of a brief workshop, there was insufficient time to address these questions in a comprehensive manner. Nevertheless, panelists agreed that land valuation was an under-appreciated dimension of the foods security problem and that more study is warranted to gauge whether reducing the information asymmetries involving land valuation might increase the bargaining power of small-holders. Logistical difficulties prevented several invited panelists from attending, and if the conversation is pursued, it will be useful to include bankers, investors, and experts in real estate law (for example) to improve the diversity of opinion within the group. But this is the sort of undertaking—fellows taking the intellectual lead in a new area of inquiry, with fellowship staff acting in a supporting role—that the Impact Fellowship program was meant to seed.

Social Protest/Democratic Practice

Workshops



Fellow Lucia Nader addresses Tunisian Forum for Economic

and Social Rights, Tunis, November 2015.

Tunis (November 2015) \* Participating fellows: Lucia Nader, Pablo Ortellado.

|  |
| --- |
| **Purpose**: Nader and Ortellado sought to expand the scope of their research to include lessons from  the Arab uprisings. To this end, they took part in a series of discussions with leaders of the Tunisian Forum  for Economic and Social Rights and Arab Regional Office board members on the complex intersections  involving street protests, the state, and established NGOs—specifically, the implications of popular  movements for democratic practice. |

**Results**: The fellows met with a group that included 11 members of the Tunisian Forum and five ARO board members (from Egypt, Lebanon and Tunisia). They described the 2013 protests in Brazil (from the left) and the more recent demonstrations there (from the right), and sought to draw parallels between that experience and what they knew of the Arab revolutions and their aftermath. Among the themes touched on during the discussion (and another the following day with the ARO board and staff) were the dangers of romanticizing street protests—particularly in the wake of counterstrikes by the state—the often-overlooked role that can be played by labor unions and professional syndicates in entrenching gains achieved by protest groups, and the intriguing fact that NGO staff members—particularly younger ones—are often active participants in the same protests abjured by their employers.

**Lessons**: It was largely at the urging of fellowship program staff that the two fellows included the Arab region in their research. Though participants in the two meetings may have initially wondered whether the Brazilian experience bore any relevance to the multiple crises in the Arab region, they generally came to understand that exploring parallels between the two could be fruitful. (Following their remarks, the two fellows were besieged by requests for more information from Forum members).

Social Protest/Democratic Practice

Global Board Meeting Participation

Barcelona (April 2014) \* Participating fellow: Pablo Ortellado

Rio de Janeiro (September 2014) \* Participating fellow: Lucia Nader

|  |
| --- |
| **Purpose and Results**: Ortellado was invited by Ivan Krastev to participate in a Challenge Seminar on  comparative protest movements; Nader helped spearhead part of a Morning Challenge Seminar on the  complex role of the Left in Latin America. |

**Lessons**: Interest in the theme of street protests and democracy (at the board level, and among senior leadership and Open Society colleagues) led the fellowship to believe that even though the topic had not been anointed a shared framework, it was nevertheless a priority area for the organization. To some degree, the two fellows have served to link discussions at the board level with parallel processes among programs and foundations.

**Conclusion**

E

VIDENCE GLEANED SO FAR of the success of Impact Fellowships is admittedly fragmentary. Yet the experience has generally confirmed our intuition that targeted cohorts, with adequate support, can pay outsized dividends in advancing Open Society objectives. That intuition will be put to the test in the coming years with Problem Statement Fellowships. But certain lessons seem well-grounded: that attention to the interpersonal dimensions of collaborative work is essential; that expectations of autonomous individuals, toiling on their own projects and invited to attend meetings outside the immediate scope of their work, will sometimes need to be tempered; that spectacle has a role to play in the creation and dispensing of new knowledge; and that the ultimate value to the network generated by these projects may take some time to be revealed.

**Appendix 1:** **Food Security/Climate Change Meetings**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Location** | **Purpose** | **Fellow Participant(s)** | **Comments** |
| April 2014 | OSIWA (Dakar) | Bi-annual meeting of Shared Framework colleagues | James Murombedzi | JM was introduced to SF colleagues and offered feedback on the emerging docket from OSIWA, OSISA, and HRI. |
| August 2014 | Zambia, Mozambique | Site visits with HRI, OSJI, and OSISA colleagues | Tim Wise | Visits with leading potential grantees working on land rights and food security |
| November 2014 | OSIEA (Nairobi) | Bi-annual; launch of OSIEA initiative on small-holders and food security | James Murombedzi, Leonard Wantchekon | The two fellows commented on OSIEA’s pastoralism work and participated in a lightning debate showcasing their contrasting approaches on building rural infrastructure |
| April 2015 | OSIWA (Dakar) | Bi-annual meeting of Shared Framework colleagues | Tim Wise | TW reported on his recent Mozambique trip to research ProSavanna and discussed future directions for SF |
| October 2015 | Stellenbosch | Bi-annual meeting of Shared Framework colleagues | Tim Wise,  Euclides Gonçalves | Fellows took part in a three-day meeting focusing on the climate aspects of the SF. |
| October 2015 | Victoria Falls, Zimbabwe | Workshop on Land Valuation, chaired by James Murombedzi | James Murombedzi, Euclides Gonçalves | JM chaired fellowship-sponsored expert panel on land valuation at UNECA conference on sustainable development |

**Appendix 2: Protest and Democracy Meetings**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date** | **Location** | **Purpose** | **Fellow Participant(s)** | **Comments** |
| April 2014 | Barcelona | OSF Global Advisory Board meeting | Pablo Ortellado | Prior to his selection as a fellow, PO took part in a Challenge Seminar, organized by Ivan Krastev, on comparative activism |
| September 2014 | Rio de Janeiro | OSF Global Advisory Board meeting | Lucia Nader | While the fellowship selection process was underway, LN helped spearhead part of a morning Challenge Seminar on the complex role of the Left in Latin America |
| Spring 2015 | OSIFE (Barcelona) | Residency at OSIFE office | Pablo Ortellado,  Lucia Nader | Residency in Spain made possible extensive study of Spanish protest movements and interactions with OSF colleagues |
| October 2015 | Vienna | Vienna Policy Conference | Pablo Ortellado,  Lucia Nader | At invitation of OSIFE, fellows took part in conference on Rebuilding Trust in Europe |
| November 2015 | Tunis | Arab Regional Office Board meeting; grantee discussions | Pablo Ortellado,  Lucia Nader | Fellows took part in extensive discussions with grantees Arab Reform Initiative and Tunisian Forum for Economic and Social Rights related to their fellowship projects |

Appendix 3

**[Letter from then-fellowship applicants Pablo Ortellado and Lucia Nader to fellowship board and staff]**

São Paulo, October 27th, 2014

Dear Board Members and OSF Fellowship Program staff,

Some months ago, we submitted two separate fellowship proposals to the OSF Fellowship Program. Both of them have as objective investigating the relation between social movements and streets protests and established public or non-governmental institutions. With this letter, we express our willingness and great excitement in coordinating and collaborating in the implementation of both projects.

One of the proposals, entitled “An Inquiry into the paradox of street protests” (from Pablo Ortellado), aims to investigate how grassroots protesters faced the dilemma of, at the same, rejecting the State and politicians as representatives and demanding more and better public services. The second proposal, entitled “Solid organizations in a liquid world” (from Lucia Nader) has the objective of, through the lenses of recent social mobilizations and streets protests, investigating how established rights-based organizations are (or are not) reacting and adapting their structures and practices to contemporary societies and what is or could be the role of funders in this new landscape. Both proposals have an international comparative perspective and would have as case studies recent mass protests that took place in Brazil, Spain and the United States.

In several ways, these proposals are “two sides of the same coin” in a pioneer and necessary debate on how institutional and non-institutional strategies and modalities of social engagement interact with each other. One of our objectives is to understand how protesters demand institutional reform while avoiding acting institutionally. Another is to understand how governmental and non-governmental institutions have or not be responding and opening up to interacting with the demands of this new activism. The complimentary of our perspectives also suggest that we should investigate the role of semi-institutionalized groups such as legal and communication groups that provide support to street protests – to understand if its hybrid nature facilitates the difficult interaction we are concerned with.

This will be done by investigating how “new” and “traditional” groups perceive and relate to each other and with the State. What is, for instance, the relation between *Movimento Passe Livre* – one of the main organizers of the mass streets protests in Brazil - with state institutions and consolidated social groups in Brazil? What do traditional human rights groups, such as Human Rights Watch and Amnesty International, think and relate to movements such *Occupy Wall Street* and *Indignados,* in the US and Spain? Should these organizations worry about testing new strategies and adapting the way they operate or, on the contrary, should they remain in the path they have been pursuing to achieve long term goals? Do funders have a role to play in this scenario? How do state officials intend to “answer” to demands of the streets and how “new” and “traditional” groups assess those answers? These are some examples of questions we are asking ourselves and would have the opportunity to deepen with the fellowships.

We believe the process and products of our proposals will contribute to strengthen vibrant democracies, assuming that they rely on a diverse, qualified and active civil society and effective state institutions.

Our backgrounds and expertise are also mutual reinforcing of academic and practical knowledge. Pablo is a consolidated and well-known academic, actively engaged with social movements. Lucia, in turn, has almost two decades of experience with rights-based civil society organizations.

Having this in mind and admiring each other´s commitment to human rights and social causes, we would like to express our willingness and enthusiasm of joining efforts and collaborating in the implementation of both projects.

In concrete terms, this cooperation would take place by the following joint work:

* Selecting and reviewing the academic and non-academic literature, i.e. we propose to collaborate in identifying, selecting and interpreting the relevant literature about the history, the causes and the implications of street protests in Brazil, United States and Spain;
* Identifying relevant actors and stakeholders in each case study;
* Elaborating and conducting interviews with selected actors, i.e. we want to do interviews aimed at understanding both how protesters interact with institutions and how institutions (both governmental and non-governmental) respond to protesters' demand;
* Joint meetings to evaluate and interpret the content of the conducted interviews;
* Promotion of at least 2 joint seminars, bringing together OSF staff and other stakeholders (probably in New York and Brazil);
* Writing joint short articles to be published in the media after each seminar.

We truly believe our projects will mutually benefit from this cooperation. We believe that by a joint work, we could not only support each other's project methodologically, but that the complementary nature of our focus (on anti-institutional protest movements and on well established rights-based organizations) will certainly illuminate the nature of their mutual interaction which is our common theoretical and political concern.

We remain at your disposal for any additional information and look forward to strengthening our relation with OSF through the Fellowship Program.

Warm regards,

Lucia Nader and Pablo Ortellado

1. Examples of fruitful collaborations include “What Hurts? Does Investigative Reporting Really Deter Corruption?” (Sept. 2011); and “Reporting China in Africa” (May 2011 and July 2012), both of which are referenced in the fellowship’s December 2014 portfolio review [document](file:///C:\Users\shubbell\Downloads\Fellowships_Investigative%20Reporting%20PRD%2012.10.2014%20(1).pdf). [↑](#footnote-ref-1)
2. Tim Wise was chosen in the fall 2012 selection round and thus preceded the debut of Impact Fellows by a matter of weeks. Nevertheless, his selection coincided with the program’s discussions on the topic of the shared framework, and he is today regarded as Impact Fellow Zero. [↑](#footnote-ref-2)
3. Camilla Toulmin, an economist with extensive expertise in Africa, who recently stepped down after 12 years as director of the International Institute for Environment & Development, was chosen as a fellow in November 2015. She will join the four fellows listed above and interact with the food security shared framework. [↑](#footnote-ref-3)
4. [↑](#footnote-ref-4)