**Open Society Fellowship Program**

**Portfolio Review Outcomes Summary**

**December 10, 2014**

**In person participants:** Maija Arbolino (observer), Leonard Benardo (program staff), Sherie Buell (observer), Sandra Dunsmore (observer), Claudia Hernandez (observer), Stephen Hubbell (lead staffer), Katy Mainelli (observer), Adam Radwan (rapporteur), Bipasha Ray (moderator), Anya Schiffrin (contributor), Zephyr Teachout (discussant), Els Torreele (contributor)

**Phone participant:** Thomas Kellogg (contributor)

**Video conference participants:** Maria Teresa Ronderos (discussant), Chris Stone (discussant)

The goal of this review was to explore the Fellowship Program’s “theory of change” with respect to investigative reporting: that investigative reportage by itself needs to be combined with additional strategic elements in order to magnify its impact and have lasting impact in bringing about social change. During the review, the Program assessed its support of investigative reporting and considered the extent to which fellows have had an impact on both OSF and the outside world. Program staff and participants addressed several topics, such as the criteria that constitute a successful fellow at OSF, lessons learned from certain fellows and their engagement with OSF and external audiences, and how to think about new approaches to recruitment and selection going forward that will strengthen the Program’s mandate and contribution to OSF.

Stephen Hubbell began the discussion by acknowledging that the professional categories of fellows outlined in the course of this review were not predetermined at the launch of the fellowship program, but rather were constructed by reviewing the roster of fellows to date and categorizing similar projects.[[1]](#footnote-1) To that end, he explained that this would be the final Portfolio Review where the program imposes an *ex post facto* lens on a particular topic. In remaining faithful to the spirit of Portfolio Reviews, future reviews will cover topics that would allow the program to adequately analyze the variance between intentions and outcomes.

Below is a summary of major ideas and questions captured from the review that the Program will refer to in its strategy discussions and planning over the coming year.

* One of the highlights of the discussion focused on the fine line that exists between an advocate and a journalist. In conceptualizing journalism as a tool for social change, how can the Program walk this fine line without asking its fellows to sacrifice objectivity? Should the Program consider recruiting more advocates than journalists? Els Torreele raised an example of a fellow whose investigative reporting covered many issues that overlap with PHP’s work priorities, but whose lack of advocacy skills made it a challenge for them to engage with her in a more productive manner. **The Fellowship Program will continue to think creatively about opportunities to merge advocacy and journalism in its selection and recruitment of fellows.**
* Conversely, should the Program seek out more journalists? Advisory board chair Zephyr Teachout noted that journalists are increasingly becoming the critical thinkers of our world and tend to be years ahead of academics in terms of generating novel ideas. Moreover, journalists by temperament are often equipped to ask awkward and tough questions and have a willingness to circulate among difficult people and environments. Stephen Hubbell mentioned several fellows to further this point: Ken Silverstein, who during his research on the oil industry became close family friends with Ely Calil, one of the world’s richest oil tycoons; Ian Johnson, who had the ability to intellectually trespass China’s strict laws and look at faith-based organizations without publicly disclosing his affiliation with OSF to the government of China; and Mark Gevisser, who surveyed LGBTQ issues in challenging countries that posed great security risks such as Russia and Uganda.
* Open Society Fellows who are journalists can be described as a ‘subset of a subset’ of journalists because of the special skills and nuance they bring to their analysis of complex open society issues. Tom Kellogg spoke of how Howard French’s reportage on the Chinese migration to Africa illuminated several assumptions and ideas he and his colleagues in the East Asia Program shared about the phenomenon. In particular, French’s ability to navigate Chinese foreign policy blogs uncovered a wealth of new information about China’s continued investment on the continent. **While these special analytical skills are central to the fellowship, lead discussant Maria Teresa Ronderos advised the Program to consider the fact that most journalists may already bring nuance to the topics they cover simply by virtue of the profession’s investigative nature.**
* One of the challenges faced by the Program is that it often receives very promising project proposals with poor outreach ideas. Given that the digital revolution has forced journalists to consistently survey ongoing conversations and debates in the public sphere in order to find the right outlets for their work, **the Program should continue to push seasoned journalists to engage with different audiences. It is no longer good practice to consider one’s work in isolation from other practitioners.** Rebecca MacKinnon and Andrew Feinstein are both examples of fellows who were successful in finding unconventional audiences for their work. Mark Schoofs was successful in bringing in a number of external interlocutors to OSF on topics including but also beyond the scope of his fellowship topic, but was unable to finish the book he had hoped to write.
* When evaluating applications, it is important for the Program to consider the spectrum of high-conflict individuals (those whose ideas are hostile and antithetical to OSF) and low-conflict individuals (those whose ideas are comfortable and may not necessarily challenge OSF). The challenge is to find someone who sits between both extremes and who can describe the world in a different way without unequivocally disagreeing with our beliefs. **During the discussion, Chris Stone advised Program staff to continue looking for individuals who might never have received funding from other programs at OSF.** An additional and fundamental criterion to keep in mind is the comparative method of the fellowship. In the Program’s experience, a successful fellowship project draws interest from more than one segment of OSF.
* Going forward, the Program aspires for its work to be more driven by concepts. In light of the fact that 95% of all applications are received over the transom, the Program will consider taking on a more active role in its recruitment of fellows. Questions for the Program to consider include:
  + How much consideration should be placed on specific themes or topics that are of interest to OSF as opposed to the general public?
  + What have we learned thus far about intentionality and deliberation with respect to outreach and selection?
  + Should we continue to prioritize internal impact over external impact?

1. The five professional categories of fellows are: investigative reporters; advocacy and litigation; academics; community organizing; and institution building. [↑](#footnote-ref-1)