

**OPEN SOCIETY FOUNDATIONS**  
**Roma Initiatives Office**

**PORTFOLIO REVIEW OF ZORALIPE IN SOCIAL  
INVESTMENT COUNTRIES**  
(Hungary, Slovakia, and the Czech Republic)

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## INTRODUCTION

This portfolio review will focus on institutional development support in the social investment countries as a class of countries where Roma organizations demonstrate a comparatively lower capacity for organizational change than in others. As we have already reviewed our work in social impact countries, this review will complete the overall review of this field. The social investment countries are Hungary, Slovakia, and the Czech Republic. Although we have only six active grants, we see this portfolio of work as the most affected by the changes we have gone through since 2011: as a consequence of our reforms, we have ended relationships with 15 Roma organizations in the period 2012–2015. Since the growth of Roma organizations is at the core of RIO’s work and so critical for the future of Roma leadership and advocacy—as well as a unique objective among donors in these countries—we want to reflect on our performance, determining key assumptions that will guide our future choices and decisions in this field.

### I. OUR AMBITIONS

We assume that change in the lives of Roma will take decades and we know that the change process will require many different players to apply sustained pressure in order to change the status quo. We assume, however, that change is impossible without Roma themselves being major players in the coming decades. While most other national minorities have organized themselves through political parties, Roma self-organization and advocacy has been done mostly through non-profit organizations. The only way that Roma people and pro-Roma advocacy can become less dependent on OSF and other supporters is if Roma organizations become strong enough to make their own cases before governments, the EU, and others.

Our ambition for Zoralipe is that Roma NGOs will be driven by their own strategies, focused on representing the interests and demands of their constituencies before authorities and influencing decision making. Our approved strategy for 2014–2017 stated that the goal of Zoralipe is the growth of Roma organizations in terms of their efficiency, impact, credibility, and public recognition. In this field, we have mixed together grant-making as a tool for improving organizational growth, fellowships for exploring new ideas, study tours for creating new experiences, and workshops for enhancing collective reflection and learning.

### II. OUR PLACE

#### **Broad trends**

Greater degree of discriminatory rhetoric, discriminatory practices, and an exclusionary environment. Unlike Bulgaria, Romania, and the non-EU countries, which are seen as exporting “the Roma problem” to the western EU through migration, Hungary, Slovakia, and the Czech Republic are among the most criticized for forced housing and educational segregation, sterilization of Roma women, violence and killings, and aggressive anti-Roma politics. There are many reasons for this situation, but the major difference between these three countries and others in South Eastern Europe can partly be explained by the fact that other countries have a “dominant minority”—Hungarians (in Slovakia, Romania, and Serbia), Turks (in Bulgaria), or Albanians (in Macedonia and Serbia). These minorities are politically influential and thereby set a standard for minority rights and status. Roma benefit from this situation, directly from the gains other minorities have made and indirectly by observing the experiences of others. In the three countries covered by this portfolio, there is no other dominant minority. Roma are much more exposed to interethnic tensions and therefore they feel greater fear.

Since these countries entered the EU earlier than Bulgaria and Romania, the negative impact of a reliance on governmental and EU funding has weakened Roma organizations to a greater extent. Roma NGOs in these countries, unlike some in the social impact countries, are not even eligible for such funding due to their weak organizational capacities.

In such a context, young Roma are dramatically less motivated to work in existing Roma NGOs. We have observed greater challenges in terms of internalized negative prejudice among young Roma from these countries in comparison to those we support from social impact countries. This is followed by lower numbers of Roma graduates as well as lower engagement—and as a result we have provided significantly fewer grants in these countries, especially Slovakia and the Czech Republic (see Annex 1). Also, the number of those who are motivated to work in Roma NGOs after finishing their studies is lower.

The leadership of Roma NGOs is weaker and nearly incapable of adapting to the new policy and political environment. Roma NGOs have almost no policy influence. As in social impact countries, there are advisory or consultative bodies, but Roma NGOs in social investment countries have little or no power and resources to make any difference. Some of the key aspects contributing to this are: 1) historically greater fragmentation regarding identity matters, a lack of dialogue, and a lack of group aspirations among Roma advocates; 2) weaker self-organization and institutional practices of engagement; 3) being the biggest, most hated, and loneliest ethnic minority, without experience in making collective claims; 4) weak capacity for evidence-based advocacy (see Annex 2) and the limits to such advocacy because political responsibility is not based on evidence; and 5) significantly lower English skills that constrain the access of many Roma advocates to international knowledge and training, as well as their effective participation in Roma-related processes at the international level.

### **Significant players**

Among the significant players in this field, we count organizations we support, organizations we do not support, other OSF entities, the EEA and Norway Grants, and the European Commission.

Among organizations that we do not support, we would mention those that work with many young people and women who could be potential human resources for other Roma NGOs:

- The *Romaversitas Foundation* is a Roma-led organization that provides training and scholarships to Roma students in Hungary.
- *Phiren Amenca* is a network of Roma and non-Roma actors based in Hungary that focuses on Roma history and culture in education. It participates in national and international consultative bodies on youth issues.
- *Slovo 21* is an organization that includes a group called the “Manushe Roma Women’s Group,” which is made up of 200 Roma women in 30 locations in the Czech Republic. These groups of women represent a potential for other organizations since they have participated in various types of training.
- *David Tiser* is a multi-faceted and visible player in the Czech Republic. He initiated the Crisis Committee, which consists of about 600 Roma students who focus on crisis situations in Roma communities.

We would also mention a few other organizations that are visible and seen as relatively successful and, as such, might influence the behavior of others:

- *Life Together* is a Czech-Roma NGO that provides more than 6,000 families with different services. Life Together was part of the initial efforts that led to the litigation of D.H. and Others v. Czech Republic. RIO stopped providing institutional support after two years, due to the organization's exclusive focus on service-provision activities that are not matched with advocacy strategies. We also found its highly-centralized leadership culture problematic. However, Life Together is a visible and well-funded organization that other organizations see as a model.
- *IQ Roma Servis* has been a grantee of multiple OSF programs since 2001 (HRI, ECP, and RIO). The organization is based in Brno, Czech Republic, and employs about 55 people, only one-third of who are Roma. IQ Roma Servis runs a legal advice and assistance center, focusing mostly on employment, housing, and debt cases. Similar to Life Together, it is seen as a relatively successful model of an organization.
- *Milan Simecka Foundation*, established in 1991, is the oldest human rights NGO in Slovakia. It has focused on the promotion of human rights, democracy, and the social condition of minorities. It is one of those most dominant non-Roma organizations working on Roma issues, but it has inadequate Roma representation and demonstrates a rather top-down approach to constituents.
- *We Belong Here* is an informal group led by prominent civil rights activist Jenő Setet. The group is the most organized and vocal in response to the growing extremism against Roma in Hungary. He is an opinion shaper among Roma organizations and many look up to him as a leadership model.

Other OSF entities—most importantly, PHP, HRI, and REF—are also among the major players that influence our work. RIO has been working with them to create synergies and coordinate support that serves the best interest of the field. While cooperation has worked out well in some cases (e.g., with HRI), we need to work more with others on the organizational development of grantees.

The EEA and Norway Grants also provide funding to Roma organizations and are the most significant funders on Roma issues. As a result of our advocacy, the EEA and Norway Grants include Roma as a priority target group, and 10% of the total budget is allocated for Roma in these three countries, which, for the 2009–2014 period, amounted to EUR 15 million in Hungary, EUR 8 million in Slovakia, and EUR 13 million in the Czech Republic. The Norway Grants mostly support service provision in the areas of education and training, access to health care, and access to justice, as well as projects promoting tolerance and anti-discrimination. They have not supported organizational development. However, we have information that the Norway Grants will announce a new cycle of funding and it will support civil society development. It will be at least two years, though, before this funding is available to the field.

In the 2014–2020 funding period, the European Commission will allocate at least EUR 1,177 billion to Hungary for the promotion of social inclusion and combating poverty, which is also supposed to benefit Roma communities. In the case of the Czech Republic the figure comes to EUR 707.2 million, and in Slovakia it is EUR 399 million. The Commission's support, however, is also focused on service provision, and there is no funding available for institutional maintenance or institutional development. Given that funding from the Commission is channeled through governments, it would anyway be unlikely to strengthen critical voices.

RIO's niche is marked by the fact that no other donor invests in the organizational development of Roma NGOs. As they try to find those who are the strongest in terms of finances and project management capacities, they put younger and less service-focused organizations in a difficult

situation, and often favor stronger non-Roma organizations over Roma NGOs. RIO's support allows organizations to commit time and energy to institutional planning, evaluation, and improvement in the most important areas in order to improve their effectiveness.

### III. OUR WORK

- Ended relationships with 15 out of 21 organizations. In most cases, we did not finish relationships abruptly. Instead we engaged in a process, lasting six months to two years, during which we tried to support grantees in improving. The reasons behind our decisions were communicated to each of them (see Annex 3). Major reasons, among others, were an absence of progress in organizational development, a lack of leadership open to learning and change, and an exclusive service-provision orientation without corresponding advocacy strategies.
- Identified new grantees, including start-ups, through our calls for proposals for policy advocacy projects (Konexe). We have solicited applications from two start-ups, one of them (Employers Association of the Roma) for one year and the other (eduRoma) for two years.
- Identified potential new grantees from our recent call for proposals on start-ups. We received 16 applications from these three countries out of which seven will most likely get our support. Six of them are from informal groups.
- Designed and tested a new approach to determining organizational programmatic sustainability and financial viability. We call this intervention a “reflection and development visit” as it aims to help both us and grantees look at contextual challenges; impact in retrospect; leadership in terms of composition, capacity, and practices; as well as funding models determining future impact, funding, and organizational development scenarios and targets. At the end of these meetings we are able to do an in-depth analysis of organizational health and strength that improves the quality of our grant making. Grantees are also able to use the format to have in-depth conversations with their partners and key constituents. The approach is highly demanding and time consuming as it pushes both us and grantees to do at least three days of preparatory work, requires two days for the actual meeting (see Annex 4), and includes follow-up Skype conversations. However, we find it absolutely worthwhile as we have never known the organizations we support as we do now. We have tested different variations for different types of organizations, and the approach still needs some refinement because, while it increases our understanding significantly, it does not do so to the same degree for our grantees.
- Designed and tested a new approach to determining the current state of the field of Roma civil society at the country level. We organize meetings to look at the context, impact, leadership, and developmental challenges in a particular country. This helps us understand the contextual challenges that directly affect the work of Roma organizations and also determine the organizations' country-level developmental challenges.
- Increased the synergy between Barvalipe and Zoralipe. We have tested our new call for proposals for internships in Roma organizations for graduates of the CEU Roma Access Programs who seek knowledge of non-profit leadership and management as well as work experience in policy advocacy. We received 5 applications and approved two, one of them based in Romaversitas in Budapest. We want to expand this call, targeting all Roma

graduates in all the countries where we work. We have also invited individuals we have supported to take part in the above-mentioned country meetings with Roma organizations in order to expose them to discussions about context, the dynamics of Roma leadership, and advocacy as well as to give them opportunities to connect with others.

- Introduced surveys of grantees' views about our work. This new practice is aimed at gathering feedback from applicants and grantees about our work with them. It has already helped us in building more trust with grantees.

#### **IV. MAIN LEARNING**

##### **What did we learn about the field?**

Most of the organizations have not been able to articulate the hypotheses or assumptions that drive their thinking about change and strategic goals that might help them assess impact and accountability. Consequently, grantees are not able to clearly explain the advocacy impact they have made; they mostly specify projects and activities. This does not mean, of course, that they have no impact or influence. It seems that they do not have the practice of articulating their desired impact as an organization because their reporting and accountability has been on a project basis. They are able to share anecdotal evidence of public attention (e.g., awards, media coverage) or access to influential policy makers, but a sense of organizational impact has been lacking.

The best example is Romedia, which is the strongest organization in the portfolio. Romedia has made significant progress in the last couple of years. It has developed a strong leadership, established an engaged board, and introduced an advisory board to assist the organization with fundraising and networking. These developments have translated into a more coherent strategy, diversified funding with no single donor providing more than 33% support, internal practices that regulate operations and secure transparency, and increased visibility. However, Romedia cannot explain how its film productions—such as the one about deportations of Kosovo Roma from Germany—contribute to change in political decisions about the issues.

Reacting to our inquiry about their strategies, all of our grantees from this portfolio in Hungary hired experts as consultants to draft their organizational strategies. This, however, did not solve the problems. It merely built dependence, as the organizations could not explain their own strategies or use them to guide their work; the strategies were only to satisfy our requirement. For example, we provided support to FAERLEO to hire a consulting firm to help it facilitate the strategy-design process. FAERLEO said that, because it had funding problems, the exercise was useful for thinking but not for leading the work of the organization.

In most of the cases, the leadership of the grantee organizations has not prioritized organizational development but rather the maintenance of current work and practices. The most telling example has been the response from Romaversitas, an important player in Hungary because of its access to students. The director of the organization is very defensive and not open to any change. He demonstrates a strong sense of entitlement to OSF funding and constantly puts pressure on us by warning that the organization is in crisis. We have heard similar accounts about this organization from REF colleagues as well.

Grantees are highly dependent on a single donor. Only Romedia and Romea have diversified funding. Our other grantees are dependent on OSF and do not have clear plans about how to attract more funding. Moreover, given that the Norway Grants are the only other major donor supporting institutional and core costs, organizations will struggle both to survive until its next round of grants is available and to find other donors apart from OSF, as per the one-third threshold.

We have tried to highlight these challenges among the major networks of funders, namely Ariadne and the European Foundation Centre. However, there is almost no interest among those engaged in Roma-related activities. At best, they would rather support an organization that is already strong or a project that fits their themes; they do not see the need to support the development of strong Roma organizations. At worst, they would rather support a project that fits their own objectives. Some are so unhappy about the present capacity of Roma organizations that they implement their own projects directly in the field.

We do not see innovative training in governance, leadership, and organizational strategy design in these countries. The training opportunities we have come across in the region are actually part of the problem; they are mostly “one size fits all” and do not support organizations adequately.

### **What did we learn about ourselves?**

We were asking for accountability from our grantees while not being clear with our own accountability in strengthening Roma organizations or adequately rigorous in our thinking about our change objectives and hypotheses. We did not sufficiently clarify the specific results we wanted for these countries and we did not have strategies defining our approaches in light of different contextual and developmental challenges.

Increase in our learning about organizational development widened the gap between us and our grantees. We would underestimate their knowledge and experience, perceiving it as too outdated and ineffective. We realized that we sometimes gave the impression that grantees must develop a certain model of an organization and that we did not appreciate their experience.

We could use our resources better. This lesson has been visible in five different aspects. First, we can do better in using the available resources we have to influence non-OSF actors to build a community of supporters for the organizational development of Roma organizations.

Second, we have overestimated our capacities. Although we are highly confident in what we are doing, we tend to have higher ambitions than we can lead and manage. Managing this field of 30-35 organizations and leadership cultures is not as easy as it initially sounded.

Third, we have asked for more funding than the field is ready for. We returned 29% of the approved budget in 2014 and 13% in 2015.

Fourth, we have mirrored the apathy in these countries. Seeing more capacity and agency for organizational development, we were more motivated to work with grantees in social impact countries. Because we have had less interest in these three countries, we have had less energy for them and less of a commitment to do more than we do in other places.

Fifth, we have to be much more selective regarding the organizations we support because the wrong selection has led to unnecessary use of our resources. We underestimated the challenges of organizational transformation, and we have realized that it is much more worthwhile to invest our money, time, effort, and patience in those who recognize the need to build strong organizations.

We still have not found the most adequate way to deal with the language barrier. The available pool of talented organizations we can access is much narrower because of their limited English ability, and communication with those with whom we work is not always the most effective.

Several difficult questions occupy our minds:

1. Should we stop funding organizational development in these countries for the time being and focus on leadership development among individuals (Barvalipe), or should we continue?
2. If we continue, what should we do, and not do, to avoid the risk of taking over agency (responsibility, ownership, control) from grantees? Whether to take a hands-off or hands-on approach has been a dilemma among RIO staff, the Roma Advisory Board, and other OSF programs.
3. Should work on changing the way governments and public services operate be a condition of our funding to organizations that have not been doing such work—i.e. service-provision organizations such as Life Together, media organizations such as Romedia and Romea, and membership/professional organizations such as FAERLEO?
4. What is the best way to overcome the lack of resource people and resource organizations able to work in local languages? Should we build a network of experienced Roma leaders who can serve as resource people to support the weaker organizations? If we do that, how do we avoid the trap of imposing such a network on grantees?