

NATIONAL FOUNDATIONS EDUCATION MEETING
HAMMAMET, TUNISIA – 28-29 FEBRUARY 2008
MEETING REPORT

Introduction

This report documents the key discussions and sessions of the meeting in Tunisia. It was written by Barbara Frye, an external consultant from Transitions Online, who provided feedback during the two days of the meeting and consolidated her own notes and participants' feedback into this report.

The format of the report follows more or less the sequence of sessions over the two days. The agenda of the meeting is appended at the end of the document.

OSI and Education

The stated purpose of the national foundations meeting in Tunisia was “to discuss the OSI mission in education and the role of education in creating and sustaining open societies.” But taking place against the backdrop of changes within OSI and within the larger education-advocacy community, that discussion was directed by a few subtexts.

Certain assumptions about OSI's role in education were on the table. In some countries, it had gotten in early after the fall of communism and made its mark. But its geographical scope has changed and so has the education-aid landscape. Both changes translate into very different levels of influence for OSI in those countries where it operates.

At the same time, the number of OSI education programs has been sliced from 26 to 10 in this decade (although there are indications that this signals a change of tactic and not simply a turning away from education), giving rise to the question of what is OSI's commitment to education? Further, given the emergence in roughly the past decade of large multinational efforts such as the Global Campaign for Education and the Africa Network Campaign on Education For All, how does OSI fit in and how can it transcend national boundaries when necessary?

Organizers hoped to formulate a platform statement on education, social rights and civil rights within OSI. It seemed likely from some of the

comments at the meeting that this statement would also serve as a kind of argument for the importance of education within the organization.

Initially, participants were asked to articulate why their foundations included education in their remits (precisely, what were their purposes for engaging in education). There was universal agreement on the fundamental role education plays in virtually every kind of reform necessary or underway in their countries, be it economic, political or civic. “Education is a component of every reform,” one attendee said, while another offered, “Without education, there’s not much you can do.”

The uses, and therefore, importance, of education ranged from building long-term support for human rights and core values like justice, democracy, egalitarianism and tolerance to meeting immediate needs like improving the lives of children living in refugee camps and helping to promote nationwide health campaigns.

The foundations function across an extremely varied landscape, and that was reflected in the question of how these goals translated into priorities at the national level. The social and economic transitions that these countries have undergone have left some of them splintered, while others remain rather closed and slow to change.

Many foundations are working to create active citizenries. This means encouraging critical thinking by, for example, creating a media literacy unit in secondary schools or incorporating a kind of “question authority” approach into existing human rights education programs. Linked to such efforts are movements to democratize the classroom, make school management and bureaucracy more transparent and develop a strong civics curriculum.

Similarly, representatives from Georgia are trying to address “A discrepancy between the values we aspire to and the values that exist,” in which many citizens, while professing a love of democracy, would actually welcome a return to autocracy. In such a climate, the goal is more freedom than justice. “Freedom is resisted by society,” which has seen a resurgence in the authority of clan, family and religion. “One goal is to help transform values through education,” the Georgia Foundation coordinator said.

In Bosnia, where children of different ethnicities attend the same school but enter through different doors, use different classrooms and eat lunch at different times, the picture is rather different. The education program coordinator there said efforts were geared toward social cohesion. Many others also talked about using education to encourage openness and tolerance in their countries, to help their citizens “find commonality.”

In Slovakia, where the government has embarked on an education reform with little outside input, the foundation has tried to make sure multiculturalism stays on the agenda. It has initiated broad discussions on the matter and has established cooperation with the education bureaucracy. Other foundations focus on issues of justice and inclusion by working with targeted groups, such as children with disabilities or AIDS orphans, while conducting a broad assessment of how education is offered to these groups.

These rather specific initiatives are the top of the pyramid. Underlying them are a few reforms championed by most foundations. They include training and establishing standards for teachers and administrators, monitoring curriculum changes and budgets, making better use of technology, devising ways to get reliable data and research, and encouraging public discussions of educational issues.

Role Of OSI

What role, then, does OSI play in education in these countries, especially given the plethora of organizations, such as Save the Children or UNICEF, working a similar plot of ground?

The patchwork of answers from attendees suggests an organization that must be flexible and nimble – and, thanks to its independent funding, can afford to be.

OSI is at once an insider and an outsider. Conference participants drew a distinction between OSI’s approach – living inside the country and knowing the needs firsthand – to that of larger, supranational organizations such as the World Bank or UNICEF. “Many other organizations make a judgment from outside the country. OSI has a particular opportunity to use their experience from inside the country ... and have this experience being supported by outside network programs and consultancy,” said the executive director of OSI/AF in Tajikistan.

In southern Africa, where donors often have very specific expectations, that experience allows OSISA to run interference. “Governments in that part of the world get blamed for not doing A, B and C,” OSISA’s acting director said. “Sometimes they just aren’t able to do the things they need to do.” It is those situations in which OSI “can become a voice for the government in dealing with international donors and monitors.”

Such a primary role, however, is unique to foundations in countries with weak central governments, and it is hardly the only function even those foundations perform. Because OSI is not forced to channel all its efforts through governments, it can step outside that framework when necessary to focus on accountability, working at times with governments, at times with other NGOs. “We at OSI don’t have the baggage of having to align with either the government or the civil society. We can actually take an independent view,” one participant said.

But while ensuring its independence, sometimes the outsider’s role limits OSI’s effectiveness. In Slovakia, the government has not welcomed any outside groups, including OSI, to participate in ongoing education reforms. In other countries, OSI’s emphasis on values like openness and democracy can become an irritant to other donors seeking to work with governments that are extremely sensitive about the activities of NGOs within their borders.

OSI is different, too, in the type of aid it offers. Keeping in mind its goal of an open society, it will leave to other organizations shorter-term efforts, such as providing technical or trade assistance to governments, while it tries to create, as one attendee put it, “policies that will live on.”

So while it might help education systems in various countries to deal with the AIDS epidemic or to improve testing, OSI aims to go beyond the Band-Aid approach and to put reforms in place that will be sustainable. “We have a developmental thinking,” one participant said.

Education Justice

The concept of education justice encompasses issues like inclusion, how money gets spent – who gets the resources -- and what gets taught in the classroom. While these are undoubtedly areas that education programs engage with regularly, this session elicited a relative dearth of responses.

In Pakistan, one participant cited inclusion and its companion, illiteracy, as major issues. About 6.5 million children, nearly 11 percent of the under-15 population, are not in school, and the country's illiteracy rate is 50 percent. While Pakistan spends 2 percent of its GDP on education, the key issue is how that money is used. The foundation has worked to develop a baseline against which it will measure how well students are learning in the future.

Other countries have large and visible groups who are on the sidelines of education. Azerbaijan hosts about 600,000 people who have been displaced by the conflict in Nagorno-Karabakh. The foundation there has taken proposals from other NGOs to fund programs for the children of those families.

In Swaziland, OSI has developed a pilot program to use the education system to offer “food, stimulation and protection” to those affected by AIDS.

Advancing Education Issues Within OSI

Given the drop in the number of OSI education programs this decade, many participants had the strong impression that education has become the stepchild of the organization. There was much more frustration than problem-solving during this session.

Those who did not simply cite the diminished funding for education programs observed that education gets neither the respect nor the consistent support that other focus areas get. One program coordinator reported being asked to write a strategy to wind down education efforts in her country, only to be surprised by a subsequent increase in the budget.

Others said education is often viewed within OSI as a means to some other end, such as access to or influence in local governments, rather than important in its own right. One program manager described education programs as an entrée to a country, which would then allow OSI to do the “real” work.

Some felt that the very nature of education reforms – that they take a long time to show results – made them difficult to champion in OSI, which some said has a certain impatience about its work.

Global Educational Developments

This session began with a discussion of how an evolving philosophy of aid is reflected in changing methods of funding. Donors have long been faced with the question of whether to provide general or targeted aid to governments. Targeted aid or “sector budget support” has been a way for donors to ensure their priorities were addressed. General support, on the other hand, allows a government to respond to the needs it sees.

Recent trends have been toward general support. While this strengthens the hands of government, it makes greater demands on donors to coordinate their oversight of funding and spending. It can also be a leap of faith for donors, who might have to align their priorities with government plans even if they don't agree.

Examples of OSI's engagement in this kind of coordination, however, were few. Only two attendees said their foundations – in Montenegro and Pakistan -- did so. OSI's Early Childhood Program provided another example, having helped to refocus a \$13 million to \$14 million EFA aid package to the government of Moldova from construction to teacher training.

In Montenegro, OSI was the only donor supporting education in the beginning of 2000. By establishing working groups at the education ministry and providing technical support, OSI was able to see its priorities addressed by the time the World Bank entered the picture in 2005. By that time, the local policy makers were able to negotiate with the bank. “We got what we wanted,” the program coordinator said.

But those kinds of intervention take clout, credibility or simply being in the right place at the right time. Reasons for OSI's engagement or lack thereof in this issue circled back to an earlier conversation – the role of the foundations in their various countries.

In southern Africa, for instance, while OSI does not “have as much of a place at the table as big donors” it engages with civil society groups to make sure they have a say in the allocation of resources.

The reactions of some participants seemed to suggest that taking on that oversight role could create the perception of coziness with a widely distrusted government.

In Azerbaijan, a too-close association with the government risks alienating civil society groups. The foundation has tried to deal with this problem by finding people within government who have credibility with civil society actors. In Tajikistan, OSI's hands are similarly tied. "If you cooperate with ministry, you will not be allowed to use the schools. None of the teachers will talk to you," the program director said.

Advocacy

The foundations operate in very different environments, but they all function in countries in various stages of development, where certain rights and freedoms are not taken for granted. Given their goal of promoting an open society, then, they must know how to push for those rights without jeopardizing their effectiveness in any given country.

This session essentially asked foundation representatives to refine their thinking about advocacy and to discuss their approaches. Had they established specific goals? Had they identified those who could make the change happen and those, in turn, who could influence the change-makers? Had they engaged in social advocacy as well as policy advocacy, which the briefing note described as OSI's "comfort zone"?

Although the briefing note stated that advocacy "must be centrally woven in our thinking and activities," many participants seemed skittish about this issue; the first chance for open discussion yielded a long silence.

Yet many had found a way. Echoing the distinction made in the briefing note between an OSI presence as opposed to OSI visibility, OSISA's education director said her foundation did not always want to be *seen* as part of an advocacy network. Instead, in Zimbabwe for example, it offered support and capacity-building to civil society organizations without being visible. In other places, it became the voice of other, more-vulnerable groups.

Examples of foundation advocacy tilted heavily toward policy activity. One participant said flatly that his foundation did not engage in social advocacy in the area of education.

In Ukraine, the foundation had championed an external testing system for university entrance exams as one way to stem corruption in higher education

– although the organization did not emphasize that angle. The effort met with resistance from university rectors, but it came at a propitious time nonetheless, as President Yushchenko was an eager backer. The foundation was able to capitalize on a reforming mood that had overtaken some parts of the government.

Also recognizing an opportunity, OSISA became part of the Africa Network Campaign on Education For All (ANCEFA), with the result that the advocacy voices for both OSISA and ANCEFA have become more powerful. Essentially focusing on its strengths, OSISA has helped ANCEFA by providing funds and operational support. It has developed new education coalitions in its priority countries, working on capacity building and then turning them over to ANCEFA’s leadership. The work has resulted in more engagement with the ESP and a higher profile and a place for ANCEFA in key continental deliberative bodies. In this way, the education program’s assistant manager said, “The voices of African civil society and education have undoubtedly been amplified.”

At the national level, those new coalitions engage in budget tracking and capacity building; the coalitions in Malawi and Zambia have successfully pushed for more funding for and input into education. At the same time, the coalitions work to raise awareness of education issues among civil society groups.

Advocacy Within And Outside OSI

The conference culminated in a wide-ranging discussion of current initiatives and what role advocacy could play in them. Participants were asked to consider what global linkages were available to further these initiatives, and what role ESP could play as well.

This session resulted in a series of regional surveys.

In the Caucasus – as in other OSI regions -- a project to create more tolerant, less xenophobic textbooks is underway. Efforts are also focused on giving schools more say in budget matters – specifically giving schools their own accounts -- and reforming the system of boarding schools for disabled children. ESP’s potential role here would be to provide expertise and funding. Although it was not mentioned as a specific avenue for advocacy, this region championed the idea of schools as community centers, which

seems a natural way to create a broader base of support within the population for education programs.

In Africa, the initiatives discussed were those helping schools to deal with the effects of AIDS and to reach nontraditional types of students such as drop-outs, former child soldiers and adults. Participants said ESP could help advance an argument within OSI for an all-Africa initiative on education. Another opportunity for advocacy would be to push for broader emphasis in EFA beyond primary education. “We don’t want to continue the idea that primary schooling is good enough for African children,” one participant said.

In southeastern Europe, common emphases were on inclusion, lifelong learning, and using education to promote sustainable development, democracy and tolerance.

Aside from these issues, some of the countries faced quite individual problems. In Macedonia, the foundation is trying to bring attention to a national development plan that has little correlation with national education plans, EU conditions or even the real educational problems in the country. In Montenegro, using the schools to promote sustainable development was a priority, with the potential help of major donors, such as the UNDP. In Romania, there is an urgent need for services for the children left behind by emigrating parents – which will be the subject of a pilot program this year -- improved education for Roma and a program on the work ethic. In Slovakia, much work is being done on opening lines of communication between civil society and the education bureaucracy.

Participants in southeastern Europe said ESP could provide funding, networking opportunities and knowledge transfer, and technical assistance.

In Central Asia and Pakistan, participants envisioned linking up with international initiatives in order to, for instance, use international funding instruments “to advocate for a holistic approach to the education sector” and to participate in the planning process through partners. Efforts underway include helping to build capacity for NGOs, monitoring education budgets, advocating for transparency, pushing for a more comprehensive approach to professional development, and advocating for the expansion of existing models of good practice.

Participants from this region spoke of the need to broaden both the focus of reform and the type of actors involved. Attention has been largely on primary education, at the expense of other sectors, including technical and vocational. Foundations there are also seeking to build capacity of local coalitions and to attract those frequently left out of the discussion. “We need to think about a broader definition [of civil society] – not just NGOs,” OSI’s consultant in Pakistan urged. Teachers unions and parents were mentioned as potential partners in social advocacy. ESP’s role here would be the familiar one of training, building capacity, supporting best practices and using its international profile at the headquarters level to reach out to other international organizations in order to tap a vast pool of expertise and funding.

A brainstorming discussion that followed inevitably touched on issues addressed in earlier sessions. A review, for instance, of national foundations’ successful engagement in this increasingly international landscape echoed the discussion of OSI’s unique role, with a list of achievements that included ensuring that proper government procedures are in place, enabling government actors to negotiate with ministries of finance and donors, building capacity, providing technical assistance and integrating OSI’s local partners into governments and planning. (Perhaps the lesson here is that OSI’s size and flexibility will be an asset in dealing with these supranational coalitions.)

But a field increasingly populated by international actors presents challenges. Among them is the simple feat of having an effect on national and regional processes, especially given OSI’s status as a small donor. Others include:

- Ensuring that curriculum development is relevant on a national and local level
- Coordinating among various global donors and actors
- Helping to temper the influence of large donor agencies on national priorities
- Coping with inadequate governance and accountability in the target countries.

The Way Forward

The need for a statement on education within OSI seems at first puzzling. Can there be an open society without attention paid to education? Has any

utopian society ever been envisioned that lacked a plan for education? But at issue, surely, is not the importance of education, but how OSI can best promote equal access to quality education in the countries where it operates.

Compared with organizations like UNICEF, the World Bank or the European Union, the OSI is a small player in education reform. Unlike international financial or intergovernmental institutions, for example, it is rarely in a position to deliver sternly worded warnings to errant governments.

That fact is central; it means that OSI must rely on its credibility, creativity and flexibility to magnify its influence. Thus far, the foundations seem to excel at assessing local needs and building capacity, whether in civil society groups or governments. As representatives of a private donor, many foundations operate in a tension-filled space between these groups. Some manage to negotiate it in various ways – by picking the right people to work with or by seeking a low profile, for instance. It amounts to a balancing act, perhaps performed most effectively by advising local governments while helping local groups to act as watchdogs over those same governments. Again, it is the role of the informed insider who can also act as an outsider. The conference's penultimate session, brainstorming for practical ways that OSI can leverage its influence, was a good illustration. The list tilted heavily toward the advocate/watchdog role:

- Pressing for evidence-based monitoring
- Supporting governments to establish mechanisms of accountability
- Supporting governments to prepare for and obtain funding
- Hosting study tours for decision-makers and policy actors
- Identifying and supporting change agents within governments
- Advocating with global processes for national governments to obtain
- Developing capacity for legislators
- Developing education policy think tanks
- Engaging in advocacy groups/coalitions to push for education justice

Many foundations seem extremely adept at national networking and policy creation and support, but judging from the conference discussions, they seem less comfortable outside a certain universe of actors. There were some notable examples of collaboration with outside groups, such as OSISA's work within ANCEFA and Early Childhood's ad hoc partnerships with the

World Bank, but surely there are more opportunities? One participant said the meeting provided a valuable chance to see “linkages” not only across the OSI network but on a global level as well. OSI’s work will not always align with that of other groups, nor should it, but this seems an untapped area for exploration.

Looking in the other direction, it is striking how little discussion the idea of social advocacy elicited, especially for an organization that puts a premium on change that is sustainable. Social advocacy can win over millions of supporters for a cause, change or program. This is particularly important in countries that will never have the carrot of European Union membership to work toward. It’s difficult to get around the idea that getting reforms to take root requires a large group of people who will stick around, even if OSI leaves a country, to fight back at the first signs of retrenchment. Happily, there was talk of involving teachers unions, of making schools into community centers, of allowing parents a say in textbook vetting.

Also encouraging on this score was a list of current and future opportunities for collaboration between the foundations and OSI, devised during the brainstorming session. For while it included many of the tried-and-true OSI approaches, such as textbook and curriculum development, independent testing initiatives, and transparency and accountability programs, it also included topics that had received relatively little attention over the two days, such as encouraging youth and parent participation in education governance and establishing public-private partnerships.

The complete list:

- Youth and parent participation in governance
- Textbook and curriculum development
- Enabling public private partnerships
- Media
- Independent testing initiatives
- Orphans and vulnerable children
- Reform of education systems (comprehensive reform)
- Education law programming (rights of various education stakeholders)
- Inclusive education
- Adult literacy

- Budget tracking
- Multicultural education/tolerance education/civics
- Teacher professional development
- Input into FTI processes
- Decentralization
- Anti-corruption (accountability and transparency)

Although most at the conference would likely say they focus on policy change because it leads to sustainable reforms, a few people saw the untapped ability of social advocacy to do that as well. “We need to do both because we need to institutionalize change,” one participant said. “If you do curriculum reform you need to understand -- we need teachers who understand -- what this reform is about, how it is implemented, and why we should start teaching people differently. So this means that we should talk to teachers. So the majority of teachers understand and [are] ... competent to work with new models. That is why we need the social advocacy.”

In short, if OSI’s education programs are going to live on, if they are going to be widely championed and if they are going to have more influence than their relatively modest funding would suggest, the foundations would do well to look up, and look down – above us and below us – as someone put it.