Introduction: The International Fellowship Program and its Formative Evaluation

In November 2000, the Ford Foundation approved the International Fellowships Program (IFP) to provide postgraduate fellowships for individuals from 22 countries. This multi-annual, $280 Million program is the largest single grant in the foundation’s history and has in 2006 been extended by another $75 Million supplementary funds allowing to award about 820 additional fellowships. In selections held between 2001 and 2010, the program awarded a total of more than 4,300 fellowships for Master study (82 percent of the Fellows) or PhD study (18 percent of the Fellows) in a variety of academic fields in the arts and humanities; the social and behavioral sciences; environment, health and applied sciences. Fellows came from 21 countries and territories in Africa, the Middle East, Asia and Latin America as well as from Russia. As of early June, 2012, 3,532 IFP Fellows had successfully completed their fellowships at 538 universities in 47 host countries, while 788 Fellows are currently enrolled at 212 universities in 29 host countries.

The IFP design is based on three key principals addressing critical areas and well-known problems in the cycle of access and equity in (international) education, and development and social justice in the global South. First, IFP presumes that equal opportunity to participate in higher education, especially at the international level, is a powerful way to reduce inequality and increase social cohesion in societies marked by high degrees of social inequality. Second, it is assumed that students from highly marginalized groups can succeed academically in international higher education refuting the assumption that they are incapable of success and therefore do not warrant any compensatory measures. Third, by targeting fellowships to candidates committed to development and social justice, IFP aims to demonstrate that
educational opportunity is an important path not only to individual advancement but to leadership for social justice and thus to broader social change.

The primary goals of IFP are thus to provide opportunities for advanced study to exceptional individuals who come from social groups and communities in the global South that lack systematic access to higher education. These individuals should have academic potential and be supported in ways that allow placement and academic success in Master and PhD programs in competitive international universities. The Fellows and Alumni are expected to use this advanced education to become leaders in their respective fields, furthering development in their own countries and greater economic and social justice worldwide. Obviously, IFP has chosen for an innovative as well as challenging approach in the world of international fellowship programs: Finding and attracting the bright minds from marginalized backgrounds in the global South for successful international graduate studies contributing to social justice and change. In addition, IFP’s secondary goals aim at strengthening the development of organizational networks for educational service provision, at stimulating the public debate on access and equity in international higher education, and at contributing to public debate and policy on social returns to higher education.

In 2002, the IFP contacted the Center for Higher Education Policy Studies (CHEPS) at the University of Twente, the Netherlands, to develop and undertake a formative evaluation of its program development and outcomes. In 2003, the CHEPS team developed a concept and design as well as instruments for an ongoing formative evaluation of IFP that reflects the multi-faceted nature of the program:

- the multi-level perspective of IFP and its goals referring to interrelated activities on the individual level (Fellows) and the organizational level (organizational networks),
- the multi-actor layout of IFP on the local, national and regional/international level in order to address IFP’s target groups and Fellows, the IFP Partner organizations in the target countries and regions, the IFF/IFP secretariat, the international placement organizations supporting the program as well as Fellows’ academic host institutions,
- the processes and outcomes of IFP in short term (e.g. the process of application and selection of IFP fellows and the further placement processes and outcomes), medium term (e.g. Fellows’ completion rates, return to home countries, early career destinations) and
more long term (e.g. further life/career trajectories of IFP alumni and their engagement for social justice).

The aim of the study is to contribute to an evaluation of IFP both to enable improvements of the ongoing program as well as to provide data and analyses that will be useful for a summative evaluation after the end of the program. The methodology mainly rests on asking the actors involved about their activities, experiences and backgrounds through questionnaire-based surveys (that had response rates of between 53 percent and 100 percent) and additionally through interviews and document analyses. Further, members of the evaluation team used participatory observation (e.g. in various types of program meetings, international conferences, site visits) to gather insight into the program and its development.

The aim of this paper is to look at the most important stages in the IFP program in the light of selected indicators of the evaluation study addressing the following questions:

(1) Is IFP able to define, reach and select its global target group(s) in the context of national/regional circumstances?

(2) Do pre-academic training and placement lead to successful post-graduate experiences and outcomes?

(3) Do the Fellowship and post-graduate experience and outcomes lead IFP Alumni into successful professional careers?

(4) Are IFP Alumni motivated and enabled to use their education and career to promote social justice?

In the following, we focus on the global picture of IFP since its beginning (addressing only selected regional differences or developments over time), present major findings as regards the achievement of primary program goals, and discuss them in a summative reflection on the features and outcomes of the program.

**Defining ‘Disadvantage’ and ‘Leadership for Social Justice’:**

**Target Group Definition, Outreach and Selection of IFP Candidates**

Attracting and selecting the most eligible candidates for IFP around the world has been one of the first challenges of the program. The profile of eligible candidates was expected to differ according to region and country given the differences in the nature of social marginalization.
and exclusion from higher education in various socio-economic contexts. Therefore, IFP aimed at most excluded social minorities in its target countries but intentionally did not apply a universal standard set of criteria for defining the characteristics of its target groups. Instead, IFP has employed an intensive, iterative process of consultation in each country or sub-region to discuss the nature of access to higher education and to identify target groups and communities that lack systematic access to higher education. Defining the target groups of IFP can be characterized as a complex and multi-level process that included ongoing reflection within countries as well as on regional and sub-regional meetings. IFP partners developed a variety of means to discuss the nature of access and exclusion from higher education in their specific social setting. Such means include secondary analysis of available statistics and research findings, consultation with national and international experts, round-tables with leaders from higher education and government, Non-Governmental Organizations and political parties. Some countries investigated into own studies mainly based on secondary analysis. In some countries reference could be made to generally agreed criteria and legally enforced policies of anti-discrimination whilst others had to set up processes and criteria in a context where issues of access and equity to higher education used to be widely ignored fields of investigation and policy-making.

Intense discussion led an Asian IFP Partner organization, for example, to reach out to people who lacked systematic access to higher education among ethnic minorities from upland areas, people working in remote and difficult to reach areas, and women throughout society. Historically most underrepresented people came from groups living in mountainous regions, remote and rural areas. Among these groups, ethnic minorities suffered most, and women were more disadvantaged than men. Another Partner organization, from Africa, developed guidelines for target group definition that addressed individuals whose economic power base was peasantry and subsistence type characterized by perennial poverty, exclusion as well as self-exclusion from modern ways of living. A Latin American Partner organization targeted groups which had very limited access to higher education because they were residents of remote areas, of indigenous or black ethnic-racial origin, had few economic and educational opportunities and where potential candidates, especially women, frequently had to take up family duties and responsibilities.

Target group definitions of International Partners thus reflected important criteria of the IFP program as well as the diversity of contexts and conditions that may have an impact on the
lack of access to higher education for certain groups or communities. This was also indicated by the responses of International Partners to the question to what extent these criteria were considered significant challenges that their target groups had to overcome to complete undergraduate studies.

What can be said beyond the diversity of contexts and conditions taken into account in the target group definitions is that poverty, coming from/living in a remote/rural area, race or ethnicity, and gender form important overall criteria. The IFP thus allowed for local variety within a set of agreed criteria on a global scale. Overall, IFP targeted countries with very limited and socially biased access to higher education and within these countries groups and communities that were even more marginalized than the average of the population.

Subsequently, International Partners undertook frequent outreach activities, used multiple mechanisms to address their target groups, sometimes under difficult national and local circumstances. After first exchange of experiences, International Partners invested considerable effort in improving their contact with new target groups, especially in remote or rural areas. The integration of first IFP Alumni into the outreach process showed another element of pro-active program development. Outreach turned out to be very successful in regions ranging from the Anambra State in Southeastern Nigeria, via the Mixtec Indian community in Mexico, to China’s Guizhou Province. With nearly 80,000 applications since its inception, IFP attracted many more applications than it could support. On the one hand, this shows that there is an unmet demand and potential among excluded communities and groups. On the other hand, IFP turned out to be a highly selective program, with an overall selection rate of five percent. In order to assure a high quality selection process, the International Partners discussed and implemented several measures. Most importantly, selection criteria were expected to reflect social exclusion as well as academic readiness and potential, social commitment indicated by community service, and leadership qualities. Unlike many other (international) postgraduate fellowship programs, IFP was not just focusing on academic readiness and potential but on socio-economic background, social commitment and related leadership potential as well. This was also expected to allow selecting candidates that would be committed to return after their postgraduate studies as social justice leaders.

All applications went through a multi-level and multi-actor process to select Fellows on the local or regional level that would finally be due to ‘endorsement’ by the IFP Secretariat. All
International Partners screened applications for completeness and/or determined the basic eligibility of candidates, set up a selection process with a number of discrete steps that include specialized reviewers as well as interviews in at least one of these steps. Partners also set up selection committees for the very final stage(s) of the selection process including rotation schemes for their reviewers and selection committees.

**Who Are the IFP Fellows? The Profile of IFP Finalists Selected**

Outcomes of IFP target group definitions, outreach activities and selection processes are intended to reflect the global goals of the program within local context and to provide opportunities for postgraduate study for outstanding individuals from social groups and communities that lack systematic access to higher education. In this context it is obviously important to have a further look on the outcomes of the selection process in terms of the profile of the IFP Fellows.

Such a look at the profile of the highly selected group of IFP Fellows reveals that the program was successful in recruiting among people with a socio-demographic background and a socio-biographic profile that fits the program goals. Overall target group criteria of exclusion and the emphasis on certain regional/local contexts are well reflected in the profile of Fellows. All in all, about 80% of them are first generation students with a poor socio-economic background who had to overcome serious experiences of social injustice to achieve their undergraduate studies. A significant percentage of Finalists reported poverty, coming from/living in a remote or rural area, and ethnicity as the major reasons for their experiences of social injustice. Gender, political discrimination, and race were also frequently mentioned factors of their own personal experiences of injustice. Two third of the Fellows of the Fellows were living in small cities/towns or rural areas when they applied to the IFP. Over time, IFP achieved also a balanced gender representation among its Fellows, was open to promising applicants who were older than the typical age group of postgraduate students, and candidates who had established families.
With regard to Fellows’ gender, a significant correlation between gender and educational background can be found: a considerably higher number of female Fellows came from a family with a father and/or mother with a higher education degree. Indicators also show that a higher proportion of female Fellows came from metropolitan/urban areas or grew up in families with an income around or above the national average. These data reflect the well-known pattern that women have to possess some higher ‘socio-economic capital’ in order to overcome discrimination in access to undergraduate education due to gender. In consequence, IFP has been facing some trade-off between gender equality in access to the program and the profile of (female) Fellows as regards other criteria of excluded minorities.
Nearly all Fellows – female as well as male - had gathered some employment experience before they applied to IFP and about two third of them had a professional training in addition to their undergraduate degree. Professional work has for many Fellows been affiliated with social activities/community services. Besides such social commitment activities in paid professional work nearly all Fellows had also volunteered in community services before applying to the IFP. Also, most of the Finalists already gathered some leadership experiences in these community services in areas such as education, community development and children, youth and family.

**Do IFP Fellows Succeed in their Studies? Placement, Outcomes and Experiences**

The next major stage in the IFP process concerns the preparation of Fellows for their placement in a host institution, matching of Fellows with host institutions as well – and most importantly – a successful postgraduate experience. IFP’s policy was to find good matches between Fellows’ abilities and their ambitions with host universities around the world, primarily abroad but possible also in the Fellows’ home countries or regions. The International Partner organizations and the Placement Partners played central roles in this process, as they prepared Fellows for their placement and actually assisted and guided them in the search and placement process. Next, we look into the outcomes of this matching process in terms of the location of study, the international mobility of Fellows and their related preferences. We asked Fellows as well whether they experienced problems around getting to and into the host university, i.e. problems with moving to the host institution and with the inception of study. Finally, we look at degree attainment, self-assessment of qualifications acquired during postgraduate studies and the satisfaction of Fellows with their postgraduate experience.

Looking over all aspects of the pre-academic training offered to Fellows by the program, we can state in summary that the different partners in the IFP organization as well as the current and former Fellows are very satisfied with how the program operates in terms of pre-academic training and placement. Our findings show that the International Partners have developed capacities to assess training needs of Fellows prior to placement, and that they are able to offer schemes for preparatory training in areas such as language, test-taking, computer, research and writing skills. Fellows find that this training corresponds to the needs that they have expressed themselves. Pre-academic training is highly valued by most of the Fellows;
they find many of the courses offered useful and a majority sees the training as contributing to the skills needed for academic success.

**Figure 3. Studying at home or abroad?**
(Alumni survey 2012, in %)

This also holds true for pre-departure information about living conditions and support structures at the host institution that turned out to be crucial issues for many Fellows. In fact, the vast majority of IFP Fellows used the opportunity to study abroad; for many of them actually the very first international experience in their life. Major destinations were English-speaking countries, that is the United States and Canada (32 percent) as well as the United Kingdom (20 percent), and Continental Europe (12 percent); about one third of the Fellows studied in their home region (about two third of them in their home country).

Partner universities of IFP offered assistance and training for IFP Fellows within existing programs for international students or developed new and innovative means of addressing training needs for IFPs international students that were useful and highly valued. In this way, IFP also contributed to reflection and action in universities around the globe on the potential of marginalized international students and support structures at the universities themselves. This does, of course, not exclude that some Fellows studying abroad experienced problems in their environment during post-graduate study or in adapting to their host institutions: Starting their studies in a foreign country, culture and language is quite a challenge for a substantial minority of (former) Fellows, although most of them appreciated the international experience
and environment in the long run. Living away from their families, supporting their families back home and housing have been rated as somewhat problematic for some (former) Fellows. Data available over time suggests, however, that IFP has increased its capacity to avoid these problems. The program also improved its capacity to place Fellows in host institutions with other international students and to bring Fellows together in certain universities. Also, across the board, a positive evaluation of the host institution’s environment for international students has increased over time.

An assumption underlying the IFP is that the match between the profile of Fellows and the profile of host institutions/study programs will lead to a successful post-graduate experience. This statement is in many ways confirmed by a vast majority of Fellows and Alumni: 91 percent of the (former) Fellows successfully obtain their degree, most of them within the period covered by the Fellowship.

**Figure 4. Degree Attainment of IFP Fellows**
(Alumni survey 2012, in %)

It is mostly PhD-students who report that they finish(ed) their program after the end of the Fellowship. This is to be expected, since IFP provides only the first three years of support for doctoral Fellows. Nearly all IFP Alumni who have not yet finished their program indicated that they will do so in the near future.

From the point of view of Fellows the study experience is valued highly: (former) Fellows function well in their host institutions and feel satisfied about the study and the support they are given. Fellows place a high value on the international environment offered by their host
study program and report that institutions are attentive to a range of other crucial issues as well. Overall, there are many indications for good postgraduate study experiences from an academic perspective, which include issues such as curriculum and instruction, but also matters such as research methods training and support from teachers and advisors. It may be especially reassuring that the in the eyes of the Fellows, programs and host institutions live up to their reputations quite well. More than eight out of ten former Fellows would strongly recommend their host program, institution or country to other Fellows.

Equally important, former Fellows report further enhancement of competencies and skills in areas that are central to the program’s goals, such as leadership competencies, strengthened commitment to social justice, and capacities to contribute to social justice in their home countries/regions. Alumni interviews and survey data show that the Fellowship experience has enhanced (former) Fellows’ self-confidence.

Figure 5. The Fellowship has helped me to.....
(Alumni Survey 2012, in %, answer categories 4 and 5 on a scale from 1 ‘Strongly disagree’ to 5 ‘strongly agree’)

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<th>Percentage</th>
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<tr>
<td>Strengthen my commitment to social justice</td>
<td>95%</td>
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<tr>
<td>Build my academic reputation</td>
<td>94%</td>
</tr>
<tr>
<td>Build intercultural competencies</td>
<td>93%</td>
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<tr>
<td>Understand what is needed to improve...</td>
<td>92%</td>
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<tr>
<td>Develop social and...</td>
<td>91%</td>
</tr>
<tr>
<td>Establish international contacts/networks</td>
<td>90%</td>
</tr>
<tr>
<td>Build skills for scientific work</td>
<td>89%</td>
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Studying in the home region (which in most cases coincides with the home country) or out of the home region (mostly in high-income countries) has a significant impact on some experiences made during the Fellowship. Overall, the contribution of the study program to the development of skills and competencies was considered stronger by Alumni who studied Out-of-Region. (Former) Fellows who studied Out-of-Region were more satisfied with their host institutions and less likely to report experiences of social injustice during their Fellowship. The rate of degree-attainment did differ between the two groups, and Alumni who studied
Out-of-Region were more likely to attain their degree during the Fellowship. Overall, Fellows studying out of the home region report a better postgraduate experience as well as more focus and time in pursuing their studies.

**What IFP Alumni Do? Returns, Professional Pathways and Social Commitment**

For almost all Alumni that we have surveyed the Fellowship experience plays an important role in their life. They value the opportunity to pursue further studies, to go abroad and to improve their competencies and skills. Also, they point to the effects the Fellowship has on their world-view. Most Alumni report that the Fellowship has broadened their outlook, that they became familiar with new ideas and learned skills that they can use to improve the situation in their home countries. Former Fellows stay committed and active in a variety of areas of social justice/community service activities.

**Figure 6. They never come back?**

(Alumni survey 2012, in %)

![Current Residence of Alumni](image)

An important indication of the program’s success is that most of the former Fellows studying abroad have returned to their home countries. ‘They never come back’ does not apply to IFP. Alumni who stay abroad mostly try to enhance their competencies and skills via further studies and/or professional work related to international issues of social justice.
Looking at the current country of residence of Alumni after the end of their Fellowship we find that 82 percent of them currently live in their home country. 77 percent of the Alumni who studied out of region have returned to their home country; only 12 percent indicated that they intended to stay abroad permanently. Most of the Alumni who remain abroad continue with advanced academic study, mostly studying for a PhD. Those Alumni doing further study often indicate that their academic excellence and the encouragement by advisors and peers have led them to pursue this option.

The post-fellowship experience is, however, not without problems, especially for Alumni returning back home after a period of study abroad: Job search and finding employment can be serious issues, especially for those Alumni who have not maintained or made contact with employers in advance. Alumni report that they find it difficult to live up to the expectations that other people may have back home given their enhanced experience and expertise. Others report that they find it difficult to implement their ideas and knowledge given the lack of infrastructure back home but also that their former colleagues or others are reluctant to adopt their suggested innovations. Such re-entry pressures fade as the former Fellows successfully complete their re-insertion process. IFP also assists new Alumni who are trying to re-establish themselves professionally in their home countries, and the program supports Alumni networks and organizations in nearly all IFP countries.

**Figure 7. Social commitment/community service of IFP Alumni**

(Alumni survey 2012, in %, *of alumni currently engaged in voluntary activities)

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<tr>
<th>Paid professional work</th>
<th>Current position related to social commitment/community service?</th>
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<tr>
<td></td>
<td>Senior Management or Leadership Position</td>
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<td>voluntary work</td>
<td>Currently engaged in voluntary activities?</td>
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Our surveys show that IFP Alumni are successful in obtaining employment, continuing professional training or academic study, or a combination of both; only 8 percent are engaged
with other activities (e.g. family care). More than half are employed in the public sector (54%); 26 percent are working in the not-for-profit sector and 14 percent in the private sector for a broad range of governmental and non-governmental organizations at the local, national and international level. Nearly two third of the Alumni hold senior management or leadership positions; as professionals, they remain committed to social justice causes in areas such as education, community development, environmental issues and children, youth and family.

Next two that two third of the Alumni are also socially active in voluntary organizations and activities, and two third of them take some leadership responsibility in these activities. The vast majority of Alumni report that they are having a strong social justice impact with their professional and voluntary activities and point to their confidence being based on awards, prizes, promotions, publications and feedback from others.

**Features and Outcomes of IFP: A Summative Reflection**

IFP differs from other efforts to support international masters or doctoral work in crucial ways and has taken a different approach mobilizing marginalized talents. First, IFP supports portable scholarships of up to 3 years of post-graduate study in accredited universities anywhere in the world in a variety of academic fields in the arts and humanities; the social and behavioral sciences; environment, health and applied sciences. Second, Fellowships are reserved for talented individuals from marginalized or excluded groups from the South lacking systematic access to higher education for reasons such as poverty, geographical isolation, ethnicity, race or gender. Third, the program defines its target group of undergraduates based on their leadership potential, their commitment to the further development of their country or community as well as based on academic performance and potential. Fourth, Fellows are expected to contribute through their further training and scholarly work to academic fields that are crucial for further economic and social justice and to take a leadership role in these areas in their own countries and worldwide.

Our formative evaluation provides many indication that IFP has been achieving these challenging goals. Overall, IFP has been very successful in continuously providing unique opportunities for further graduate level education to talented individuals from marginalized groups and communities that traditionally lack access to higher education. Target group criteria of social exclusion, academic potential and readiness, social commitment and
leadership potential are well reflected in the profile of Fellows. It is a key element of IFP’s overall success that pre-academic training and the placement process achieved its goals of placing Fellows in competitive (international) programs, and (so far) nearly all Fellows successfully finished their postgraduate studies. Many Fellows use the opportunity to study abroad; the program does, however, not contribute to ‘brain drain’ since the vast majority of them return to their home countries. Nearly all Alumni – whether at home or remaining abroad for employment or further studies – are involved in some kind of social activism and many of them are advancing in leadership positions.

IFP has also constantly been working on further improving its performance in crucial areas, and our evaluation was supportive in achieving this. Areas of improvement include fine-tuning of outreach and ‘good practice’ in selection procedures, the further strengthening of capacity to assess training needs of Fellows and to offer schemes for preparatory training. Over time Fellows’ profile has developed even further in the direction of overall program goals. The program has improved its capacity to place Fellows in host institutions with other international students and to bring Fellows together in certain universities. Partnerships with universities have been established that were also instrumental in providing support for IFP Fellows after entering their postgraduate programs. A better match has been achieved between the expected time to degree and the duration of the Fellowship.

Nothing is perfect including IFP. We have, for example, seen that the program has been facing some trade-off between gender equality in access to the program and the profile of (female) Fellows as regards other criteria of excluded minorities. The outcomes of the postgraduate study experience as well as its assessment by the Alumni has been less positive among Fellows who studied in their home region/country compared to Fellows studying out of region.

We can, however, conclude that the design and procedures of IFP enabled the program

- to build stakeholder commitment, sustainability, and ongoing innovativeness;
- to achieve a capacity to activate and meet part of the high demand of talented but excluded students that is obviously out there;
- to establish successful placement activities and high graduation rates; and
- to contribute to leadership for social justice in the global South.
All in all, the IFP experience shows that social inclusion in international higher education and leadership for local social justice are not mutually exclusive but compatible goals.

Understanding the achievements of the program calls attention to a number of structural and procedural features. What we have seen is that what at first sight looked as a ‘mission impossible’ actually proved to be successful. The strategy of focusing on postgraduate fellowships implied the major challenge to target groups and communities that are least likely to have gained access to higher education in their country or region while looking for promising talents that nevertheless achieved success in undergraduate higher education. This ‘mission impossible’ turned out to mobilize the most important resource of the program - students from marginalized communities in the global South that had already proven themselves by overcoming major obstacles with very little external support to gain an undergraduate degree. Therefore, the proven assumption of IFP could be how much more these students would accomplish with program-based support.

Most obviously, financial resources thus played an important role as well, and certainly for one of the biggest post-graduate fellowship program ever. IFP could rely on a substantial financial commitment made via the establishment of the International Fellowship Fund. The program needed to establish structures and processes on a global scale that pay at the same time attention to local context. It needed the space and time to develop. This would probably have been impossible without a substantial and long-term financial commitment made by the Ford Foundation.

This commitment also formed the platform for the very interesting approach taken in the implementation of the program. IFP has created a world-wide partnership of organizations around its central unit in New York. This partnership involves 20 organizations in the IFP countries or regions, international placement partners as well as strategic partnerships with certain universities. Global outreach and local presence are thus based on a network of organization that also builds on the expertise and contacts of these organizations.

Further, this approach allowed for respect for local variety within a common framework. The IFP has, for example, not developed a detailed standard list in order to operationalize its target group criteria on a global scale. Instead, it has set up an intense and ongoing process of consultation in each country and region to discuss the nature of access to higher education and to identify target groups and communities that lack systematic access. In this process certain cultural, social, and economic indicators of ‘exclusion’ have been identified and prioritized.
for the purpose of the country or sub-region. Techniques were discussed and implemented for the outreach of the IFP to the respective target groups and their selection according to the local circumstances. Continuous exchange on ‘lessons learned’ and ‘good practice’ forms part and parcel of the achievements of this inspiring ‘glocal’ program.