**Scholarship Programs October 8th Portfolio Review**

**Staff- vs. Grantee-Negotiated Academic Placements**

**INTRODUCTION**

Individual grants within Scholarship Programs have taken various forms over the years: six-week study stays, multi-year semester-long study visits, one and two-year fully-funded taught course programs, four year fully-funded undergraduate degrees, four-year fully-funded doctoral degrees, and partial support at the undergraduate, master’s, doctoral, and post-doctoral levels. Our models were developed with significant input from partner organizations, co-funders, and universities. All of the models are grounded in the belief that immersion in alternative academic environments holds multiple benefits for individuals from countries where open society values and practice are negligible to non-existent. Creating access to these benefits for a wide range of talents from a diverse array of cultural and geographic contexts is what the Scholarship Programs do.

Prior to 2014, the Scholarship Programs budget accommodated any model we proposed for the constituencies we were trying to serve: portable supplemental funds for near-diaspora or refugee communities, multi-year faculty grants for curriculum development, living stipends for doctoral students, and full packages for a variety of master’s-level studies, among others. Naturally, each model carried its own **costs**: in addition to the amount given directly to the individual, there were the costs of **specific grant components** (pre-academic programming, university fees and tuition, insurance, international travel and visas, conferences, etc.), **the competitive process** (advertising, application design and dissemination, review committees, interviews), **grants management** (data entry, notifications, payments, tax filing, reporting), and **long-term record-keeping and evaluation**. Fully funded awards actually represented leveraged financing, with OSF support balanced against shared costs with universities, partner organizations, or in one instance, with private donors; shared costs did not, however, extend to OSF staff time and overhead (with one exception[[1]](#footnote-1)).

**DEFINITION OF PORTFOLIO**

In response to the 50% budget reduction of 2014, we streamlined our work into two funding models: fully funded master’s awards and non-degree academic project grants for faculty and doctoral students:

* The first model (**Civil Society Leadership Awards**) presents applicants with a fully-funded package, including subsidized application and testing fees, face-to-face interviews and facilitated graduate admissions, pre-academic preparation, full coverage of travel, tuition, living stipend, and related costs of study, and ongoing staff support throughout the degree and beyond.
* The second model (**Civil Society Scholar Awards**) offers non-degree academic project grants to doctoral students and faculty who already have an academic placement and have most of the associated costs covered, yet need support for specific research projects that will move them closer to degree completion or improve their academic output in their home university.

Decisions made during this streamlining process carry significant implications for staff allocation, program design, and funding priorities. The portfolio review presents a welcome opportunity to explore the implications of these decisions against the canvas of past experience by investigating the following question:

**Research Question**:  Given that the second model (based on grantee-negotiated placements) is far cheaper in terms of grant amounts and staff time, why do we pursue staff-negotiated placements for the majority of our awards?  Is there a significantly different value, in terms of advancing our mission, between these two options?

We posit the following hypothesis and associated claims:

**General Hypothesis**:  Staff-negotiated placements generate added value that significantly outweighs their additional labor and cost.  The most important added value is the access created for individuals from countries marginalized by mainstream international education, those who otherwise are not considered for admission, much less university funding, by reputable graduate programs at accredited universities.

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**Claim One: staff-negotiated placement for master’s degree study creates significant access to knowledge and international resources for budding civil society leaders in politically constrained societies — TRUE.** Our experience for master’s level supportshows us that considerable added value attaches to staff-negotiated placements.  We define staff-negotiated placements to be the culmination of our multi-stage recruitment and selection process, each step of which is designed to bridge barriers--provide access--for individuals who would otherwise be shut out of opportunities for quality graduate education.

**Claim Two: staff-negotiated placement for doctoral study improves higher education capacities in politically constrained societies — FALSE.** Our experience offering staff-negotiated doctoral (and faculty[[2]](#footnote-2)) awards, versus short-term academic project support, shows there is relatively little added value attached to the far costlier and labor-consuming staff-negotiated doctoral awards.  Well-timed smaller grants to those who have negotiated their own academic placement are just as effective for our goal of supporting academic capacity-building in challenged environments.

**METHODOLOGY AND DATA**

In order to explore these claims, we identified a manageable sample by focusing on several award models on offer in three countries over a three-year span. The countries, Tajikistan, Moldova, and Palestine, were selected because they had a useful variety of our awards on offer, represented non-traditional international students (‘marginalized’ academic communities), and contained strong in-country scholarships partners. Our goal in this review to query how scholarship processes and staff engagement affect outcomes (primarily access), so we do not single out particular programs for analysis so much as key procedural points we created which have proven influential in our work. Data from host university partners highlight how our work meshes with common university practice, and the extent to which our practices diverge from it.

The award types on offer represented a matrix of staff- vs. grantee-negotiated placement, full- vs. supplemental financing, and study at master’s vs. doctoral/faculty level. Descriptions of the awards under analysis are found in Annex A. In-country scholarships partners ranged from small local entities offering advising services for study abroad (The Educational Advising Center in Chisinau; scholarships-focused staff at the Soros Foundation in Dushanbe) to large quasi-governmental agencies and non-profits promoting and co-funding opportunities in particular hosting countries: the German Academic Exchange Service (DAAD), the French equivalent*,* Le Centre National des Oeuvres Universitaires et Scolaires (CNOUS), and the American non-profit international exchange organization, AMIDEAST. These partners (whose alignment with particular programs/countries also can be found in Annex A) helped to implement the advertising, recruitment, and selection processes essential for providing the access points we analyze in detail below.

We explore our hypothesis and claims with evidence drawn from program competitions and grantee statistics, host university agreements and partner interviews, and alumni survey data. Staff analyzed records for programs from the sample selected and surveyed a representative sample of host university representatives and program alumni to gather the following information:

* + Basic program statistics on numbers of applicants, finalists, and costs;
  + Statistics on applicant and finalist profiles (e.g., standardized test scores, GPA, employment and educational histories);
  + University surveys, including admissions criteria and process, international student population, and opinions of OSF process and grantees
  + Alumni survey data, including perception of OSF recruiting and selection process.

Our goal here is to query how scholarship processes and staff engagement affect outcomes (primarily access), so we do not single out particular programs for analysis so much as key procedural points we created which have proven influential in providing access.

**SCHOLARSHIPS IN CONTEXT OF MARGINALIZED GEOGRAPHIES**

The countries under focus represent ‘marginalized’ academic communities in the perspective of international academia. This does not mean, however, that OSF efforts represented the only opportunities for international student mobility. The European Union’s Erasmus Mundus program, DAAD, and the UK’s Chevening Program offered postgraduate scholarships in all three countries during the years under study. Fulbright offers master’s awards in Palestine; however, in other locations its support is limited to faculty mobility. The Edmund Muskie Program was active in Tajikistan and Moldova until recently and offered master’s study in the US. In Tajikistan, the Asian Development Bank offers support for master’s study in Japan, primarily in finance, banking, and development.

The academic disciplines on offer highlight a major difference in OSF’s approach. Other scholarship programs typically offer a range of disciplines, the most popular being business and management, the hard sciences, and health professions. With our focus primarily on the social sciences and humanities, OSF supported marginalized disciplines within these disadvantaged geographies. Whether in programs we offered independently or in those we devised in partnership with a co-funder, such as DAAD or (prior to 2010) Chevening, we carved out space precisely for fields foundational to open society values.

OSF Scholarships also are known for being the least “strings-attached” opportunity on the international scholarship horizon, because our programs are not restricted by government “soft diplomacy” foreign policy objectives. Our work reflects a values-driven agenda rather than a government-funded agency’s politically sensitive mandate, where selection criteria can be filtered politically.

Thoroughly analyzing the take-up of various opportunities in marginalized countries is difficult—the data necessary to obtain a full picture is unavailable or challenging to locate. Published reports[[3]](#footnote-3) reflect total numbers of students from particular sending countries and document the number studying in various host countries; rarely, however, do reports include helpful details on the individual countries of our focus or specifically on issues of access.

**Snapshot: OSF Scholarships in US context**

The Institute of International Education’s *Open Doors* surveys trends in international education from a US perspective. The annual publication reports the number of graduate students (MA and PhD level) from each sending country by year. If we compare these published figures with numbers from our own programming, we can conclude that OSF-supported a significant proportion of total graduate students from Tajikistan, Moldova, and Palestine in the years of our focus:

% of graduate students in US supported by OSF

|  |  |  |  |
| --- | --- | --- | --- |
|  | 2010-11 | 2011-12 | 2012-13 |
| Tajikistan | 33% | 61% | 39% |
| Moldova | 15% | 18% | 27% |
| Palestine | 32% | 14% | 14% |

In 2011, for example, OSF programming supported 61% of all Tajiks in US graduate degree programs; in 2010 we supported about a third of Palestinians.

Data showing students’ fields of study from our selected countries is not available. However, the report does show the relative popularity of disciplines across *all* international graduate students studying in the US. In recent years, social sciences and humanities (the main OSF-supported fields) attracted 10-12% overall. If we assume these trends apply to the three sending countries of focus, we see that OSF likely supported the vast majority of those studying in these fields; indeed, our support greatly increased the overall percentage focusing on these fields.

The above suggests that OSF interventions uniquely support marginalized fields of study in challenged locations. Below we explore how best to achieve this—via which combinations of program models, staffing allocations, and resource outlays.

**EVALUATION**

We evaluate Claim 1 by examining our process in detail at key procedural stages; evidence for Claim 2, though, comes primarily from a comparison of grantee profiles in staff- vs. grantee-negotiated doctoral placement.

**Claim 1:** Staff-negotiated placement for master’s degree study creates significant access to knowledge and international resources for budding civil society leaders in politically constrained societies. TRUE.

The main benefit of staff-negotiated (and relatively more costly) placements at the master’s level is, we claim, access—access to alternative, high-quality academic environments for those otherwise talented but unlikely to be admitted, much less funded by internationally recognized graduate programs. We attempt to create access at each point in our multistage recruitment and selection process. In the five sections below, which correspond to key stages in a program cycle (see Annex B), we disaggregate our procedural decisions and evaluate elements intended to bridge barriers by answering the question: Did programmatic decisions create access for individuals otherwise prevented entry into internationally reputable graduate programs?

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1. *Program Research, Development, and Partnerships*

Ensuring access starts with program research and planning: staff must increase their own knowledge of local contexts and develop partnerships early on with receptive host universities. Staff consult with OSF expert colleagues and conduct research to answer essential access questions: which fields of study are marginalized or unrepresented in local higher education, which disciplines should be prioritized as foundational to nurturing open society values or filling capacity gaps locally, which populations are underserved by local educational opportunities, and how are those populations best be reached? Once we identify priority disciplines, we begin discussion with host university partners on the parameters of cost sharing and admissions Discussions begin by contextualizing the non-traditional applicant pool hosts are likely to consider and addressing possible adjustments to their admissions timeline and eligibility requirements.

Cost sharing with host universities and other stakeholders allows us to offer a full package of support, including remaining tuition, living expenses, and travel. Offering comprehensive support is crucial in attracting applicants from disadvantaged countries where financial constraints are the first and greatest barrier to international student mobility. Costs are prohibitive: tuition alone for a two-year master’s in the US at our hosts ranges between $60-80,000 and living costs add $35-40,000; tuition for a one-year program in the UK averages $25,000 and living costs $22,000. As reported by our partner universities, university funding for international master’s students is very limited. Indeed, master’s enrollment is actually a major revenue source for universities. As our programs are designed to provide comprehensive support, our grantees need not worry about separate competitions for admissions and financial aid.[[4]](#footnote-4)

1. *Outreach and Recruitment*

Advertising and promoting scholarship opportunities collaboratively with local partners (education advising centers and OSF grantee organizations, for example) ensures that information is open and accessible, even to those outside privileged communities. Local partners conduct education fairs, hold informational sessions at universities, and travel in person beyond capital cities. They promote the program as a fully funded opportunity, demystify the application process, and target activist profiles and members of marginalized communities for special focus.

Promotional material includes detailed program parameters and thorough descriptions of the selection process. Clarity in the process, communicated by local partners, builds a reputation for transparency and fairness, helping to overcome common local assumptions that success requires personal connections and wealth or suspicion that locally-administered opportunities are corrupt. At every stage applicants are informed about their progress in competition, which also contributes to the OSF reputation for transparency and fairness.

*Many believe in transparent selection of OSI. As you do via an open call, through advertisement in national media, and partners. Your deadline is fixed and no one accepts application after it. All received applications are reviewed outside the country, and applicants are directly informed if they are shortlisted by the network program. The local scholarship coordinator's roles are limited to the management of expenses only.*

Alumnus, Tajikistan

*Economics Professor, Rutgers University*

When we compare OSF outreach efforts to those of our partner universities, we see clear differences. Universities typically rely on websites, reputation, and (where possible) alumni for attracting students from less represented sending countries. Without our involvement in these marginalized locations, most universities would have minimal ability to recruit there. According to our surveys, none of our partner universities actively recruit students from Moldova, Palestine and Tajikistan outside of the OSF programs.

1. *Application Design and Process*

For most programs, Scholarships designs an in-house application, which serves as the anchor evaluation tool during the selection and placement process. Utilizing a single OSF-designed application, available in paper and electronic format, simplifies and streamlines the otherwise daunting, complex, and costly task of applying to graduate programs. Tailored to our priorities, the OSF application elicits information essential for evaluating an individual’s identification with, past promotion of, and future plans for fostering open society values. .

As part of our investigation, we compared partner university application forms with ours. The OSF application is more detailed and delves deeper into questions relating to individual trajectory and other biographical and personal traits, all designed to gauge membership in marginalized groups and commitment to positive social change. This type of data is important for increasing access: it allows reviewers, interviewers, and host university faculty to more easily consider factors that otherwise may be overlooked. One such factor is “distance travelled” as opposed to “raw” achievement. In taking “distance travelled” into account, “applicants are judged on the starting point and its effects – family, culture, income, gender, and such life adversities as war, asylum, and refugee status – and the level of achievement at the point of evaluation”.[[5]](#footnote-5) In our surveys, university representatives themselves commented on this -- several volunteered that the OSF application gave a fuller picture of an individual, enabling selection to include more than the usual academic metrics to evaluate achievement.[[6]](#footnote-6)

Beyond application format, the review process ensures access. OSF covers the not insignificant costs associated with applying to graduate programs. Universities require applicants to submit scores for a variety of standardized tests to prove language proficiency (for example, IELTS or TOEFL) or general scholarly preparedness (GRE). Registration can cost $150 per test and require advance online registration and payment by credit card. Even though Internet access is less of a concern than in the past, applicants report difficulties such as unreliable connections that drop unpredictably. In many locales, potential applicants lack internationally-recognized credit cards. Furthermore, testing locations are primarily located in capital cities and test dates are often oversubscribed. Individuals from more distant locales are disadvantaged with additional travel and lodging costs. Individuals in some cases have had to travel to a neighboring country to secure a timely test date. .

Most universities also expect online application and fee payment, which can dissuade applicants from low-income countries from applying independently and make applying to multiple universities impossible. The average application fee for our partner universities was $75. Most schools do not offer a paper application and even when one is available, it must be requested directly from the university. The single OSF application serves multiple target universities across multiple fields. Applicants generally need only complete our application, gather a set of transcripts and reference letters, and submit a single package for consideration at multiple hosts.

The result of this “extra-university” process in attracting applicants is that individuals know they will avoid the significant costs and often frustrating complexity of applying to multiple schools, the need to apply separately for admissions and scholarships, and can “imagine themselves” competing successfully.

1. *Multi-Stage and Multi-Stakeholder Selection*

Applicants are evaluated at multiple (and independent) stages by selection committee participants who represent a diversity of stakeholders. Committee members come from various backgrounds and are able to evaluate applicants through the prism of multiculturalism, taking into account that notions of leadership and success can be culturally specific and therefore merit careful unpacking. From the applicant perspective, enlisting international representatives (rather than administering selection locally) local context also helps with program reputation and perceptions of transparency.

Our multi-stage selection process includes university representatives who, through their participation, become sensitized to local contexts and the specific challenges faced by applicants. Orientation to the local context can also foreground certain entrenched barriers their own admissions systems might present to non-Western applicants, helping to shift beyond culturally-determined indicators of success to other characteristics that might identify leaders and change makers of the type OSF hopes to support. This has a direct impact on access. Sensitivity to local barriers helps ensure that non-traditional applicants are considered even if they do not meet the usual admission metrics. OSF staff further contextualize local realities and ensure appropriate weight is given to non-academic strengths, such as social activism and compelling personal trajectories.

In-person interviews are a unique and significant component of the Scholarships process and one almost never available to universities vis-a-vis these countries beyond our programs. Involvement of local experts (OSF foundation representatives, program alumni, local scholars) during interviews further contextualizes the applicant pool, shedding light on issues difficult or impossible to capture in written applications, including the local higher education context, the nature of barriers to access, and potential membership in marginalized groups. In-person interviews give applicants with subpar standardized test scores the chance to showcase language capacities not reflected in the test.

If we compare the Scholarships selection process to a “typical” university selection process, we see a number of potential barriers to international students. Most universities have little communication with applicants through the application process and are unable to provide one-on-one advising and assistance. Admissions staff generally make the first selection cut of the applicant pool based largely on general academic metrics of GPA, standardized tests, and other, sometimes culturally-specific, understandings of “success and leadership.” This process tends to rule out “riskier” profiles. From our survey, universities rarely interview applicants for master’s programs. When conducted, interviews are done via phone/skype and only for borderline candidates.

1. *Leveraged Funding and Facilitated University Placement*

Including university representatives in the selection process facilitates consideration of “risker” profiles; however, there is no doubt that OSF’s significant financial backing is also key. Although universities cover at least 50% of tuition, OSF’s coverage of other costs, and our ongoing availability for assistance throughout the academic program, allow us to leverage support toward promising activists and leaders holding OSF values, even when they are not the most impressive academically.

The most obvious cases of OSF influence during placement are those individual whose standardized test scores are below the published entry requirements of the universities. From our review, minimum language requirements for our partner universities in the UK and US averaged a score equivalent to a 592 TOEFL. Average OSF grantee score was 536, indicating that negotiated placements increased the access of grantees who would not otherwise have met the minimum requirement. We consider this a critical intervention that generates significant access for OSF profiles. For example, only one of 16 grantees in Master’s program targeting Palestinians scored higher than the minimum TOEFL posted by the host programs.

OSF has built a reputation as selecting motivated, driven, and interesting individuals that contribute to the internationalization efforts of universities and the diversity of classrooms. University partners have come to trust our process, which though open to “non-traditional profiles” is nonetheless perceived as rigorous and resulting in cohorts of motivated and unique individuals. Partners are aware that our grantees attend an intensive summer academic writing “boot camp” immediately before starting the academic program. In cases where language ability remained a concern even after interviews, this prospect in some cases “sealed the deal” and resulted in admission.

All schools surveyed claimed that they are more likely to accept a “riskier” profile because of the affiliation with OSF and knowledge of the OSF selection process and the specific goals of the different programs. In fact some schools state that OSF’s more nuanced process can identify profiles otherwise missed in customary university admissions:

*We’ve been willing to take greater risks with the OSF group, knowing that there is a level of motivation that the students have when they enter the program to be able to accomplish it.   There is a more rigid screening process at OSF than [elsewhere] ... There is a different candidate that comes via the OSF program versus our other international programs.   It doesn’t mean that some of our other international students are not committed to introducing change within their countries, but admission to our program the normal way doesn’t require it.  The OSF program definitely meshes with the school’s mission of creating social change.*

Social Work Professor, Columbia University

*Economics Professor, Rutgers University*

**Claim 2:** Staff negotiated placements for PhD study improves higher education capacities in politically-constrained societies-FALSE**.**

Our experience with staff-negotiated doctoral and faculty awards, versus short-term academic project support, shows that there is little added value attached to the far costlier and labor-consuming staff-negotiated arrangements. This finding underpins our belief that well-timed, small, supplemental grants to those who have negotiated their own doctoral placement are just as effective as full-support awards for our goal of supporting academic capacity-building in challenged environments.

1. *Staff-Negotiated Doctoral Placement*

Two discontinued programs represent the staff-negotiated placement model for doctoral studies: the Doctoral Fellows Program (DFP) offered in Tajikistan and Moldova from 2008-2011 and open to any qualified individual, and the Palestinian Faculty Development PhD Program (PFDP-PhD; 2006-2007), which was specifically limited to Palestinian university professors holding master’s degrees. Both efforts entailed full financial support (with the customary university cost sharing arrangements), followed recruitment and selection processes similar to those described for master’s support in the previous section, and placed grantees in universities in North America. While these full-support programs definitely increased access to doctoral studies for applicants from the marginalized countries under focus, we claim that the significant budget and staff-time costs outweighed the generated benefits.

Undoubtedly, staff interaction with host university representatives and OSF funding helped secure admission for a number of these doctoral grantees who were less compelling academically than international applicants accepted independently into PhD programs. Our grantees generally did not have high rates of foreign degrees at the bachelor’s or master’s degree levels.  Particularly among the Palestinians, average TOEFL and GRE scores were much lower than the posted minimum scores of the programs they entered. Furthermore, less than 10% could suggestion institutions appropriate for their specialized interests.  This contradicts general trends among international doctoral students in the US, most of whom apply to several institutions on their own.  In short, these grantees were unlikely to have succeeded in gaining admission independent of OSF leverage. .

Despite some shortcomings, most of these grantees did not need special consideration or flexible admissions. Grantees’ language capabilities were adequate: for instance, only three DFP grantees (<10%) required intensive English language preparatory courses as a condition of admission. While many candidates presented borderline GRE scores, host university representatives that we surveyed noted that this potentially negative factor was outweighed by the applicants’ compelling histories and evident passion for their fields. Accordingly, host university partner surveys brought forth comments such as “all the students brought forward by OSF have been borderline for us” and “would not have been admitted except under the particular set of circumstances surrounding their applications”[[7]](#footnote-7) Similarly, one another noted that grantees’ scores were “well below what we would typically expect of an international applicant”, but “all did fine because they were strongly committed”.[[8]](#footnote-8)

In addition, our doctoral grantees all benefited from the fact that US PhD program admissions processes strongly resemble the multi-tiered, culturally sensitive processes that Scholarships designs for its competitions. Most of our host universities’ master’s admissions processes involve far larger numbers than do PhD admissions, and therefore are more “metric-based” and take less detailed account of applicants and their interests than do doctoral admissions, due to the nature of the time and effort that will be invested in the students by faculty.

In sum, DFP and PFDP grantees presenting weaker academic profiles were the exception, not the rule, and the nature of the PhD admissions process – as opposed to that of the master’s admissions process – favored them. On balance, we suspect that the majority of DFP and PFDP grantees likely would have been able to gain access to PhD programs independently.[[9]](#footnote-9)

1. *Grantee-negotiated Doctoral Placement*

In contrast to grantees benefiting from OSF staff-negotiated placements, grantees of OSF’s Global Supplementary Grants Program (GSGP) were required to secure their own doctoral admission as a condition of eligibility. This program offered small grants (averaging $7,500) to students from select countries at any stage of doctoral study at Western institutions. In addition to admission, applicants had to have secured the majority of their funding from their universities or other secondary sources.

By design, this award was not intended to generate access to PhD programs; on the contrary grantees on this program were *not in need of OSF assistance* with initial graduate program admissions.   In contrast to our master’s grantees and the previously discussed fully-funded doctoral grantees, these grantees were a much more sophisticated, internationally savvy, and cosmopolitan group.   Indeed, research on data from several competitions clearly showed that the vast majority of these grantees held master’s degrees from reputable institutions outside their home countries, and 50%  held “external” bachelor’s degrees, as well.  Furthermore, all of the grantees demonstrated excellent language skills and standardized test scores that assured their admission to doctoral programs on clear academic merit.  Ten percent of the grantees had prior OSF funding and all had strong departmental support (usually research or teaching assistantships).

Partially funding for this self-placed profile has strong advantages. Perhaps most importantly, competitive doctoral programs almost always provide admitted students with extensive financial support. This explains why applicants for our supplemental doctoral funding usually have relatively small, but often crucial, financial “gaps” to bridge. While small, these expenses frequently relate to key necessities, such as research trips, data collection, translation, and time off from teaching in order to complete dissertations. In surveys collected from GSGP grantees, several noted that our funding crucially freed them from teaching, thus allowing time to focus on research and writing. Supplementary funding for doctoral students who already have the strong support of their departments increases the odds that they will graduate. With completion rates for US doctoral students hovering around 50%,[[10]](#footnote-10) supplemental awards serve a strategic purpose in providing resources that directly impact grantees’ abilities to complete their degrees.

While the points presented above validate our claim that well-timed, supplemental grants to those who have negotiated their own doctoral placement are as effective as full-support awards in supporting academic capacity-building, one final point should be noted: while partial support dedicated to those who have found their own way to the upper reached of academia may leave us open to criticism of supporting ‘elites’, full support costs significantly more and reduces the number of individuals we can reach. We believe, however, that this restricted reach and potential “elite focus” is counterbalanced by the fact that our full-support at the master’s level, offered at top-notch universities, can serve as a stepping stone for applicants who wish to become internationally competitive doctoral applicants in the future. The prevalence of strong “external” master’s degrees among our supplemental grantees bears this out, as do the cases of several grantees in our survey who initially had OSF support at the bachelors or master’s level and then went on to doctoral degrees independently.

In this sense, by fully funding master’s degrees and partially supporting doctoral degrees, we hit two OSF targets with one stone: first, we provide full funding and staff-negotiated placements to those who most need access to it, while concomitantly making future PhD admissions more likely (on a self-funded basis) for those who choose that past. Second, we provide crucial partial support to those who only need this level of funding. Full support is more likely to be essential for those who have yet to fully explore their potential, are highly motivated but sorely under-funded, and who do not have the international connections necessary to pull them into quality academic programs. Our intervention in assisting with fees, facilitating admission, preparing the student with summer school, and negotiating shared costs with the university, helps to open doors for the profiles we seek to help.

**DISCUSSION QUESTIONS**

* Is our decision to shift completely away from negotiated doctoral placements final? Under what conditions might we consider this model in the future?
* Is it worth exploring models of self-negotiated placement for master’s support?
* Is our claim that self-negotiated placement (and supplementary funding) presents the best model for doctoral support valid for faculty support?
* With our shift away from staff-negotiated placements for faculty support are we missing a segment of university teachers whose low level of international exposure prevents them from arranging their own visits and who, ironically may need these opportunities most?
* After a year’s experience, have the streamlined program models proved useful in the new geographies? Do the new “closed” or “priority” countries present special challenges for access not addressed in past program design? What adjustments are likely to be necessary?

1. The Edmund S. Muskie Graduate Fellowship Program, funded almost entirely by the US Department of State, including OSF salaries and overhead. This program was partially administered by OSF from 1992-2004. [↑](#footnote-ref-1)
2. While not a primary focus of this review, faculty programming shares (with doctoral support) the goal building academic capacity in challenged environments. For both, we claim that this goal is best (and most efficiently) served by small grants awarded for independently-arranged research projects. [↑](#footnote-ref-2)
3. Farrugia, C.A. & Bhandari, R. (2013). *Open Doors 2103 Report on International Educational Exchange*. New York: Institute of International Education; General data can be found at the UNESCO Institute for Statistics (www.uis.unesco.org); specific data on Germany in *Wissenschaft weltoffen Kompakt, 2014.* Deutsches zentrum fur Hochschul- und Wissenschaftsforschung. Bonn: DAAD (http://www.wissenschaftweltoffen.de). [↑](#footnote-ref-3)
4. Evidence from last year’s unusual recruitment and selection process, while outside the scope of this review, supports this point: due to time constraints in 2014 we relied partially on university-recruited applicant streams. Here we found a number of individuals who had gained admission independently to universities in prior years but were offered only partial support and could not take up the offer. [↑](#footnote-ref-4)
5. Ilchman A.S., Ilchman W.F., and Tolar, M.H., “Strengthening Nationally and Internationally Competitive Scholarships: An Overview”, in *The Lucky Few and the Worthy Many*: *Scholarship Competitions and the World’s Future Leaders* (Bloomington: Indiana University Press), 2004: 18. [↑](#footnote-ref-5)
6. Again, experience from our 2014 cycle supports this claim. As we relied in many cases on existing university applicant streams, we were unable to use an OSF-designed application. We found most university lacking in the information we would normally rely on to evaluate an individual’s commitment to supporting open society values. [↑](#footnote-ref-6)
7. Survey response: Faculty advisor and selection committee member, Department of Economics, Rutgers University. [↑](#footnote-ref-7)
8. Survey response: Faculty member, School of Education, Syracuse University. [↑](#footnote-ref-8)
9. It should be noted that PFDP PhD grantees were also compelling to host universities because the doctoral scholarships were part of a much larger effort, led by OSF, AMIDEAST, and USAID to revitalize Palestinian academia. As such, the doctoral scholarships were one component among many others, such as master’s scholarships, faculty visit awards, the creation of Teaching and Learning Centers at Palestinian universities, and annual conferences on academic topics during the seven-year course of the program. Universities were motivated to be part of this larger effort. [↑](#footnote-ref-9)
10. “PhD Attrition: How Much is Too Much”, *Chronicle of Higher Education*, July 1, 2013. [↑](#footnote-ref-10)