



USAID
FROM THE AMERICAN PEOPLE

SEVEN IMPORTANT QUESTIONS TO ASK WHEN DESIGNING A USAID HIGHER EDUCATION SCHOLARSHIP ACTIVITY



Higher Education Scholarship Toolkit

OCTOBER 2021

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PREPARED BY

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COVER PHOTO

U.S. Ambassador Scot Marciel welcomes the first cohort of 17 Lincoln Scholars on Feb. 16, 2020.
Credit: USAID/Myanmar.

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I. INTRODUCTION

United States Government (USG) scholarships and financial assistance for higher education are [defined](#)¹ as USG-funded, full or partial financial aid provided for students to further their education. This includes tuition assistance and fee waivers, as well as financial or other support for experiential opportunities such as research assistantships, fellowships, internships, or apprenticeships. This also includes assistance for expenses accrued while furthering one's education such as housing, health insurance, transportation, books, and materials. Such financial aid may be awarded based on a range of criteria (e.g., merit-based, needs-based, or career-specific). At USAID, scholarship programming is funded by a number of different funding streams across technical sectors to help achieve development objectives.

Recent research shows that there are six main rationales for scholarships for students from low and middle-income countries:²

1. To develop skills and build human capacity;
2. To enhance diplomatic relations between countries;
3. To promote social change at home;
4. To spur sustainable or international development strategies;
5. To internationalize host or home country higher education institutions (HEIs); and
6. To increase students' access to quality higher education by removing funding barriers.

It is hard to meet all of these objectives in a single activity, so identifying a priority for scholarship programming is essential to effective activity design. For USAID, achieving development objectives should be at the heart of all scholarship programming.

¹ USAID. "PIRS ES.2-2 Scholarships." <https://www.edu-links.org/resources/pirs-es2-2-scholarships>

² Campbell, Anne C., and Emelye Neff. "A Systematic Review of International Higher Education Scholarships for Students from the Global South." *Review of Educational Research* 90.6 (2020): 824-861.

2. PURPOSE OF THIS DOCUMENT

Research shows that scholarship activities must take the local contexts into consideration when planning effective activities, including higher education opportunities, the labor market, and policy contexts.³ The list of questions in this document provides a starting point for USAID Mission and Washington staff to determine if scholarship programming is a good fit to achieve development objectives, to avoid pitfalls in activity design, and to help adapt the activities to the local context.

Seven important questions to ask when designing a USAID scholarship activity:

1. Why does your operating unit want to create scholarship programming?
2. What development objectives will the scholarship activity help you achieve?
3. What is the appropriate type of education?
4. How do you determine the size, scope, and additional programming for the budget of the scholarship activity?
5. How do you design for inclusion?
6. What should be considered when planning the timeline?
7. How do you identify and avoid risks associated with scholarships?

Note: A printable version of the questions and related sub-questions is available in [Appendix A](#).

This document is a result of a literature review, a review of USAID materials, and interviews with USAID and other USG scholarship designers, managers, and implementers.

³ Perna, Laura W., Kata Orosz, Bryan Gopaul, Zakir Jumakulov, Adil Ashirbekov, and Marina Kishkentayeva. "Promoting human capital development: A typology of international scholarship programs in higher education." *Educational Researcher* 43, no. 2 (2014): 63-73.

3. USING THIS DOCUMENT

You may consider the seven questions individually or as a whole, at the start of the design of a scholarship activity or throughout the implementation. For deeper consideration, each of the questions has additional prompts and notes in the following pages. It is not necessary to move through the questions in order, although it might be helpful.

The document may also be used as a discussion document with a team in your operating unit (OU) or with your partner country counterparts. The list of questions may also illuminate where you might need to seek additional information, consultation, or expertise. The document may provide additional questions to ask external experts like administrators of other scholarship programs, government officials, or scholarship alumni.

Scholarship activities must be adjusted for local contexts.

It is important to avoid using the exact same scholarship model, year after year, in different countries without adjusting for the home and host countries' contexts.

In addition, this checklist is designed to work in tandem with other documents in the Scholarship Toolkit:

- Stages of Implementing a USAID Scholarship: Placing Students at the Center
- Good Practices for Scholarships Embedded in Larger USAID Activities
- Diversifying Scholarships: Lessons Learned in Supporting Students Who Are Marginalized
- Beyond Financial Assistance: Good Practices for Extracurricular Programming in USAID Scholarships
- USAID Scholarship Alumni Engagement: Good Practice Paper
- Guidance for Monitoring, Evaluating, and Learning for Scholarship Activities
- Case Study: Program to Extend Scholarships and Training to Achieve Sustainable Impact
- Annotated Bibliography of USAID Evaluations of Scholarship Activities
- Glossary of Terms and Additional Resources

4. LIST OF QUESTIONS

In this section, each question is explored, with related questions and additional information available to help you think about these elements of scholarship programming.

Question 1: Why does your operating unit want to create scholarship programming?

It is important to know why your OU wants to embark on scholarship programming and what your OU hopes to achieve. The original motivation or idea may need to be explored or examined further in order to align with USAID development objectives. Having clarity of vision and purpose of the programming will shape the activity design in line with development objectives.

Related Questions

- What are the main development objectives that your OU is trying to achieve?
- What skills, knowledge, and attitudes are needed and by whom?
- What level of higher education is needed? For example, post-secondary technical and vocational education and training (TVET), bachelors, or more advanced degree training?
- Is another educational or training intervention better to reach development objectives?
- Does another similar scholarship program already exist?

Considerations

Scholarships for international development are based on the logic that talented individuals will be supported to attain a higher level of education, and with this education, they will achieve greater outcomes. This basic framing suggests that individuals are expected to enhance their knowledge, develop skills, and change attitudes—as well as build networks—while on the scholarship. This raises questions about what type of higher education activity will deliver effective experiences and reach desired goals. For example, should the scholarship focus more on building technical knowledge or on developing networks of leaders in policy reform?

In order to address Question 1, USAID staff need to set clear goals. Ideally, assessments will be conducted at the outset to inform activity design and to ensure that the scholarship programming fits the context of that country. Examples of assessments that can inform your planning include higher education review, [labor market assessments](#),⁴ or [youth assessments](#).⁵

You may also wish to consider whether scholarship programming is the right intervention to address specific objectives. For example, would a specific online course, such as an intensive certificate course in data management for ministry staff, better meet the development needs, while also being more accessible and widely available? Being clear about whether scholarships are the right intervention and considering alternatives and larger programming is important.

⁴ FHI360 and USAID. “Key Approaches to Labor Market Assessment.” (2018).
<https://www.youthpower.org/key-approaches-labor-market-assessment-interactive-guide>

⁵ USAID. “Youth Assessments 101: YouthPower2: Learning and Evaluation.” (n.d.)
<https://www.youthpower.org/sites/default/files/YouthPower/files/resources/YOUTH%20ASSESSMENTS%20BRIEF%20FINAL.pdf>

It is worth noting that there is considerable international aid for scholarships, although funding is not equally distributed around the world.⁶ Some countries have many scholarships, both in types of scholarships and number of students supported; other countries have few. It may be the case that a private foundation or another government is already offering scholarships in the area you also want to support. Conducting a short survey of existing scholarship opportunities by other donors or even other USG agencies can help you to avoid duplication, as well as learn about the gaps in offerings.

Question 2: What development objectives will the scholarship activity help you achieve?

Once you establish the development objectives for the scholarship activity, it is wise to connect it to other USAID projects, activities, and development frameworks. These existing strategies and activities may influence the design, management, or implementation of the scholarship activity, especially if the scholarship intervention is embedded in a larger program or activity.

Related Questions

- How does the scholarship activity align with other development goals, such as the partner country government strategic plan, USAID [Country Development Cooperation Strategy](#),⁷ or the home country government's plans?
- How will the scholarship activity contribute to other USAID activities and/or development objectives in the country or region?
- Will the scholarship programming be a stand-alone activity, or will scholarship support be embedded within a larger activity? (See Table I.)
- Should you target a certain group of candidates within a system (e.g., government employees) as a cohort or have open recruitment?
- Are the conditions in the country such that the graduates will find fulfilling work and job opportunities where they can apply their skills upon graduation?
- Are you including support for the alumni of the activity to continue to work toward the aims of the scholarship activity?

Considerations

Scholarships have multiple ways of contributing to development objectives. In the short term, they can increase enrollment in higher education, support marginalized youth with increased opportunities, and build specific skills. In the longer term, scholarships can help to support government leaders, innovators, researchers, and many other types of opinion-leaders. However, one of the challenges is that you may not see an immediate return on investment; it may be many years before graduates reach levels of leadership and power.

In addition, consider how difficult it is for one person—even if they are highly educated and motivated—to create change. Change can take a long time, require support from like-minded peer groups and

⁶ UNESCO. “Global Education Monitoring Report: Inclusion in Education: All means all.” (2020). <https://en.unesco.org/gem-report/report/2020/inclusion>

⁷ USAID. “CDCS - Country Development Cooperation Strategy,” 2019. <https://www.usaid.gov/project-starter/program-cycle/cdcs>

networks, and need to be executed in an enabling environment, often with policy support. Even funding a cohort of individuals through scholarships may not be sufficient to change an organization if that organization is not ready for change. As you consider activity design, it may be relevant to explore organizational- and or system-level change that may also need to occur. This may mean the difference between a stand-alone scholarship activity (where scholarships are the sole activity) compared to scholarships embedded in a larger activity, with additional supports and linkages among activities. Adequate funding for alumni engagement and support is also a strategic investment.

TABLE I. Examples of Embedded and Stand-Alone Scholarships

TYPE	EXAMPLES	LARGER GOAL	SCHOLARSHIP ACTIVITY CHARACTERISTICS
Stand-Alone Scholarships	Lincoln Scholarship Program in Myanmar ⁸ Borlaug Higher Education Research and Development (BHEARD) ⁹	The larger goal is typically to build skills across a variety of fields and sectors, aiming to enhance technical capacity in government, civil society, and the private sector. Scholarships may be international or domestic.	<p>Often these are large activities, with multiple cohorts.</p> <p>These activities may provide degrees across multiple academic fields, so recruitment is more complex.</p> <p>Activities often select individuals from diverse or vulnerable backgrounds.</p>
Embedded Scholarships	Science, Technology, Research, and Innovation for Development (STRIDE) ¹⁰ Smart Waters ¹¹	The larger goal is often to improve capacity in another area, such as agriculture or public health, in or among the partner country(ies). Scholarships may be international or domestic.	<p>Scholarships may be a small or large component of the activity, depending on the other interventions.</p> <p>Academic degree programs are directly linked with building specific skills in the activity area.</p> <p>Partner higher education institutions (HEIs) are likely to be part of other aspects of the activity or have expertise in this area.</p>

⁸ U.S. Embassy in Burma. “Ambassador Announces Lincoln Scholarships for Master’s Degrees in U.S.A.” (November 26, 2019). <https://mm.usembassy.gov/ambassador-announces-lincoln-scholarships-for-masters-degrees-in-u-s-a/>; Support for scholarships for government participants ceased after the military takeover of the government in 2021, however support for non-government participants has continued.

⁹ Michigan State University. “Borlaug Higher Education for Agricultural Research and Development” (n.d.) <https://www.canr.msu.edu/bheard/>

¹⁰ USAID and RTI International. “Science, Technology, Research and Innovation for Development (STRIDE) Program.” (n.d.) <https://stride.org.ph/>

¹¹ USAID. “Smart Waters Infosheet.” (n.d.). <https://www.usaid.gov/central-asia-regional/fact-sheets/smart-waters>

One important review to conduct at the beginning of activity planning is a local [labor market assessment](#).¹² While the labor market can change, it is important to get a realistic sense of employment opportunities for graduates. If there are few employment opportunities available in their fields of study—or if social or political systems are not open to certain profiles—you may be setting up your students to be in a very difficult situation upon graduation, which will also influence the efficacy of the activity. You also might be compromising the chances of recruiting quality candidates for the future. Your choices here could be to either shape your activity to meet a demand, or to work with employers and systems to create these opportunities for your scholars.

Question 3: What is the appropriate type of education?

There are numerous considerations about the type of higher education that is the best fit to achieve development objectives and your OUs goals. For example, post-secondary vocational training (known as VET or TVET) may be more relevant to the local labor market opportunities than advanced degree training for masters or doctoral degrees. In addition, educational modes and styles are diversifying rapidly, with new online, hybrid, and low-residency programs becoming increasingly common. The institutions that provide this education are also to be considered.

In addition to formal education, additional informal components of a scholarship activity design help achieve development objectives. These include pre-academic training, mentoring, leadership training, and professional development opportunities such as conferences, internships, networking, and alumni grants. Including some or all of these elements are critical to ensuring student success, and they likely will affect the budget and timeline of your activity design and implementation.

Related Questions

- Can local or national training institutions provide high quality education in the target fields? If not, is there an opportunity to partner with the HEIs to build capacity?
- Will the activity participants study in their home country, a third country, or the United States?
- Would online or remote education opportunities (online degrees, hybrid models, or other learning) be relevant and suitable?
- Do students need full scholarships to cover all costs associated with study? Or might partial scholarships or semester-only scholarships be sufficient?
- Other than financial support toward an academic degree, what other kinds of interventions and support should be considered for each activity's goals to ensure student success and long-term outcomes that meet development goals?
- Could travel to the United States for cultural exchange, study abroad, short-term training, a study tour, or other intervention improve the impact of the activity?

¹² Youth Power. “Key Approaches to Labor Market Assessment: An Interactive Guide,” (n.d.). <https://www.youthpower.org/key-approaches-labor-market-assessment-interactive-guide>

Considerations

While USAID scholarship programming has historically focused on undergraduate or Master's degree support, there are also other models of scholarship support that may help an OU to achieve development objectives. In other words, in addition to thinking about available university academic programs, also consider the types of skills, knowledge, and networks that you seek for the students. Alternative types of scholarship programming that may work for your OU include TVET, associate's degrees, or other diploma programs; online or hybrid degrees; summer intensive programs or research programs; or internships or study abroad opportunities. Some of these may include short-term travel to the United States. These scholarship models often provide targeted high-quality education, yet reduce per-student costs given tuition and cost-of-living expenses for U.S.-based programs.

Likewise, there are many benefits to funding scholarships that host students in the home country, overseas, or a mix of scholarship destinations. Factors to consider include quality of HEIs, admission requirements, language of instruction, level and types of institutional support for scholarship students, area of academic specialty, and cost of tuition and living expenses. For many scholarships, funding students to enroll in leading HEIs in the home country or region helps to meet the program goals by building networks and facilitating employment opportunities.

Question 4: How do you determine the size, scope, and additional programming for the budget of the scholarship activity?

Scholarships can range significantly in size and scope, from a few students in an embedded scholarship to hundreds each year in a stand-alone scholarship activity. They also vary in terms of length of support, amount and type of financial support, number of cohorts selected, length of formal alumni engagement, evaluation timeline, and other variables. Alumni engagement should also be included in terms of budget planning. Moreover, there are also extracurricular considerations that will influence the budget, such as conferences, workshops on specific soft skills, internship programs, and other student support. Staff salaries and other administrative needs should also be considered. While budgets are often the major factor in determining size and scope, other factors should also be considered.

Related Questions

- What is the ideal number of individuals to fund to achieve development objectives?
- Are partnerships with national and local governments, employers, or other stakeholders possible to expand the potential impact?
- What additional interventions will the implementing partner want to consider in order to supplement formal education?
- Will there be adequate support and ways to engage alumni once the formal educational experience ends?
- What resources are available in the students' home communities to support the students before, during, and after the scholarship?
- Can a cost-share or other leveraging support be included as part of the activity design?

Considerations

Scholarships can be very expensive undertakings, with a sizable amount of funding support for tuition, housing, insurance, and other daily living needs. The cost for one student varies dramatically based on length of study, host country, HEIs, cost of living, and other variables. Oftentimes the budget shapes the size and scope of the scholarship activity. However, with ample planning and considerations, it is also possible to change certain variables to reduce costs. For example, it might be possible to negotiate a reduced tuition at host HEIs or partner with a host government or private business to provide cost share or tuition fee waivers. There are other ways to reduce the overall costs, such as to consider shorter or hybrid degree programs or choose degrees at quality HEIs in lower-cost countries. Research indicates that accredited foreign degrees are perceived to be just as valuable by employers even when offered in hybrid or online formats without living abroad.¹³

At the same time, it is important to balance the consideration of cost with the total number of scholarships needed to achieve the activity goals. One important consideration is using a cohort approach. A cohort is a design where a group of students go through the degree program at the same HEI together, with an intention to build relationships among these individuals. Cohort models also mean sending groups of scholarship grantees to the same institution. This model reaps several benefits, including having more time to develop relationships with host HEIs or possible adaptation of curriculum or student services for this specific student population.¹⁴ There is also some evidence that it leads to the development of "critical mass" to produce change in universities, government offices, and other organizations at home after the scholarship ends.¹⁵

To build sustainability and long-term partnerships, it is worthwhile for USAID scholarship activity staff to consider strategic partnerships with national, regional, and local government leaders. This is especially important in the case where the candidates for the scholarship might be government officials, where policy reform or national practice is a goal, or if cost-share is envisioned. Bringing government partners and scholarship alumni (either USAID, other U.S. Government, or other funders' alumni) to the conversation early will help immensely in designing an activity that is connected to government plans and has local buy-in. In addition, research¹⁶ shows that many scholarship activities are founded and supported based on visionary leaders and their own transformational education experiences. Finding these champions is a good strategy.

¹³ Koda, Yoshiko, and Takako Yuki. "The labor market outcomes of two forms of cross-border higher education degree programs between Malaysia and Japan." *International Journal of Educational Development* 33.4 (2013): 367-379.

¹⁴ Bigalke, Terry, and Mary Zurbuchen, eds. *Leadership for social justice in higher education: The legacy of the Ford Foundation International Fellowships Program*. Springer, 2014.

¹⁵ Kent, Anna. "Recent trends in international scholarships." In *International scholarships in higher education*, pp. 23-42. Palgrave Macmillan, 2018.

¹⁶ Campbell, Anne. "Examining non-state actors' contributions to international higher education scholarships," *Commissioned Report for the 2021 Global Education Monitoring Report*, UNESCO, forthcoming.

Question 5: How do you design for inclusion?

At the heart of any scholarship activity are the students who are going to gain the education and carry the learning forward to help their societies. Putting the student experience at the center of your activity design is important to successful scholarship programming. In addition, focusing on who benefits from the scholarship, the type of leaders needed in the country, and their profiles is important to determine from the outset, especially to seek input from populations and communities that are marginalized.

Related Questions

- Is your activity designed to be accessible and inclusive of all profiles (especially women, students with disabilities, LGBTQIA+ individuals, and older students)?
- Does your activity design encourage and support student participation beyond those in the capital or large cities? Does it include students who are matriculating from historically underrepresented schools and who are from underrepresented ethnic, tribal, or political groups?
- From whom can you get input so that your design is more inclusive?

Considerations

Many scholarship activities are designed to seek individuals who align with the activity's development objectives, have a promising vision for the future, show leadership skills, and demonstrate that they can be excellent students. Many times, these candidates are those who have achieved a great deal already, have high language and intercultural skills, and may be able to afford higher education without scholarship support. Oftentimes, without intention, scholarships can perpetuate the elite within a country along gender, ethnic, urban, or linguistic lines.

From the early stages of design, USAID staff can look closely at how to design scholarships that focus on considerations relevant to students who are marginalized or in vulnerable situations. This may mean that scholarships are designed specifically for a group (e.g., refugees) or it may be that specific considerations in timeline, budget, or other factors are made in the program.

To help design for inclusion of all profiles, additional voices can be invited to the table to help to understand these realities and unique ways to include these students. While the implementing partner is responsible for recruitment and selection, emphasizing these factors from the beginning of the activity design will strengthen the likelihood for successful scholarship implementation.

Question 6: What should be considered when planning the timeline?

Scholarship activities can be very time-intensive, as there are many more steps than just finding the right people and providing financial aid. In addition, a scholarship activity can take many years, from the planning stages to supporting alumni projects. This question is intended to highlight the right timeline considerations when planning a scholarship activity, including accounting for proper planning and recruitment timelines on the front end, and proper alumni support on the backend.

Related Questions

- Have you given enough time to work with the implementing partner and other stakeholders to be able to recruit and support the right candidates?
- As the success of scholarships are based on establishing and maintaining relationships, will the activity staff be in place for the length of the activity?
- Can the activity be designed to support alumni of the scholarship in a meaningful way? Can others who want to support similar goals also be supported through alumni engagement?
- Are you committed to monitoring, evaluation, and learning for activity impact?

Considerations

Activities that are quickly conceived or rushed to begin selection often jeopardize the opportunity to plan accordingly, are not well designed for the local context or stated objectives, or are unable to recruit the right profile of candidates. As a general guideline, scholarship activity implementing partner staff spend at least six months in the planning and recruiting stages before selecting candidates. Depending on the complexity of the activity, it might take longer, and it also varies based on when the HEIs enroll students, when courses begin, and other academic term factors.

While six months might seem like a significant amount of time before "launching" the activity, many steps need to be considered, as well as time for gathering input from key stakeholders, designing the activity, hiring of staff, establishing a monitoring and evaluation plan, effectively recruiting candidates, and meeting HEI deadlines for enrollment. In interviews with key informants, a common theme¹⁷ was that rushing through these periods may result in a small application pool, few candidates from outside the capital city, or too few qualified candidates that meet the profile desired.

In addition, scholarship activities should have input from a wide array of stakeholders who are invested in the success of the activity. This is because the real return on investment happens in the years after the scholarship funding ends, once the individual student has graduated and is launching the next phase of their career. It takes time to see the benefits of the education, networks, and other elements of scholarship activity participation and how they lead to the desired goals. In some ways, selecting an individual for a scholarship is the beginning of a life-long relationship. Sustained commitment to following that individual, understanding the impacts, and calling on them as alumni to help are important components of any scholarship activity. If only a few individuals are supported by the scholarship activity, or as staff changes, alumni engagement can drop off and there is a potential for the activity to be less effective—or for USAID and its implementing partners to know less about their impact.

Scholarship activity evaluation is usually completed at the closing of the activity or in the 6-12 months following. This is often the case because of the length of the award and little additional funding available specifically for alumni engagement or activities once the award ends. Given social media, it is now easier to find alumni than in the past. However, thinking from the very beginning about an alumni engagement strategy and perhaps setting aside funding for more longitudinal evaluations is key to developing and maintaining strong connections—for both activity impact and for measuring this impact over time.

¹⁷ This was reported in interviews with USAID staff and implementing partners.

Question 7: How do you identify and avoid risks associated with scholarships?

Some specific challenges occur in scholarships, across both stand-alone and embedded activities. Some of these have already been addressed in this document. Others include: a) inability of individuals to apply their skills when they return home, or not being able to earn a decent salary, often resulting in graduates emigrating; b) challenges to student well-being when in a new context and culture, including mental health, adequate emotional support, and community building; c) inconsistent or contradictory messages from administrators to students that lead to frustration or stress; and d) changes in the home country government or other shifts in the home context (e.g., coup or natural disaster), jeopardizing the ability of graduates to fulfill the requirements of the activity. Knowing the risks upfront may help you to plan your program in a way to mitigate these challenges.

Related Questions

- Are the scholarship activity goals clear and available to all stakeholders? Will students know what they need to do to fulfill the expectations?
- Does the activity require students to return and work for a specific office or entity?
- Is there adequate support for students, especially in terms of advising and post-graduation employment support?
- How can the activity be resilient to changes (government change, policy changes, market changes) in students' home or host country?

Considerations

Scholarship students are high-achieving and want to do the best they can. Regardless of their skills and aptitudes, pursuing higher education on a scholarship can come with a set of demands and expectations—from sponsor, family, and self—that add pressure to individuals.¹⁸ At the same time, many scholarships have very vague or shifting goals, do not align programming with their goals, or do not measure long-term outcomes.¹⁹ One way to avoid risks associated with scholarships is to transparently share the activities goals with the applicants, students, and HEIs so all partners are clear regarding the activity's goals and expectations of students.

At the same time, graduates should not be *required* to achieve the goals, as binding contracts can inadvertently limit alumni contributions.²⁰ For example, students might start a new line of research while on scholarship that is more beneficial or important than the one to which they originally agreed; in other words, education has the power to be transformational so scholarships should also allow and adapt to the students' plans and ideas. This is also relevant to specific employment positions, as graduates might find new pathways forward (e.g., advocating for disability rights) that they had not

¹⁸ Baxter, Aryn. “Engaging underrepresented international students as partners: Agency and constraints among Rwandan students in the United States.” *Journal of Studies in International Education* 23.1 (2019): 106-122.

¹⁹ Martel, Mirka. “Tracing the spark that lights a flame: A review of methodologies to measure the outcomes of international scholarships.” *International Scholarships in Higher Education*. Palgrave Macmillan, Cham, 2018. 281-304.

²⁰ Campbell, Anne C. “Influencing pathways to social change: Scholarship program conditionality and individual agency.” In *International Scholarships in Higher Education*, pp. 165-186. Palgrave Macmillan, 2018.

considered when applying for the scholarship.²¹ Instead of binding contracts, other approaches include flexible contracts, establishing graduation plans, and social contracts.

It is also very important to realize that the home country context may change while the individual is on scholarship. Most alumni show that they are dedicated to their home country and want to return, yet situations such as political unrest or natural disasters may make this difficult and impede their plans. On the other hand, new administrations or new HEIs may open up opportunities that were not foreseen.²² Keeping the activity design and implementation flexible and monitoring the home country context is an important element for success. Again, alumni groups are an excellent source of information and opportunities for scholars to get a realistic sense of the context and opportunities.

²¹ Campbell, Anne C., Erin Kelly-Weber, and Chelsea Lavalley. "University teaching and citizenship education as sustainable development in Ghana and Nigeria: insight from international scholarship program alumni." *Higher Education* 81 (2021): 129-144.

²² Campbell, Anne C. "How international scholarship recipients perceive their contributions to the development of their home countries: Findings from a comparative study of Georgia and Moldova." *International Journal of Educational Development* 55 (2017): 56-62.

5. APPENDIX A: IMPORTANT QUESTIONS TO ASK WHEN DESIGNING A USAID SCHOLARSHIP ACTIVITY CHECKLIST

CHECKLIST		
1. Why does your operating unit want to create scholarship programming?		
<input type="checkbox"/>	1.1	What are the main development objectives your OU is trying to achieve?
<input type="checkbox"/>	1.2	What skills, knowledge, and attitudes are needed and by whom?
<input type="checkbox"/>	1.3	What level of higher education is needed?
<input type="checkbox"/>	1.4	Is another educational or training intervention better to reach development objectives?
<input type="checkbox"/>	1.5	Does another similar scholarship program already exist?
2. What development objectives will the scholarship activity help you achieve?		
<input type="checkbox"/>	2.1	How does the scholarship activity align with other development goals?
<input type="checkbox"/>	2.2	How will the scholarship activity contribute to other USAID activities and/or development objectives in the country or region?
<input type="checkbox"/>	2.3	Will the scholarship programming be a stand-alone activity, or will scholarship support be embedded within a larger activity?
<input type="checkbox"/>	2.4	Should you target a certain group of candidates within a system (e.g., government employees) as a cohort or have open recruitment?
<input type="checkbox"/>	2.5	Are the conditions in the country such that the graduates will find fulfilling work and job opportunities where they can apply their skills upon graduation?
<input type="checkbox"/>	2.6	Are you including support for the alumni of the program to continue to work toward the aims of the scholarship activity?
3. What is the appropriate type of education?		
<input type="checkbox"/>	3.1	Can local or national training institutions provide high quality education in the target fields? If not, is there an opportunity to partner with the HEIs to build capacity?

CHECKLIST		
<input type="checkbox"/>	3.2	Will the activity participants study in their home country, a third country, or the United States?
<input type="checkbox"/>	3.3	Would online or remote education opportunities (online degrees, hybrid models, or other learning) be relevant and suitable?
<input type="checkbox"/>	3.4	Do students need full scholarships to cover all costs associated with study? Or might partial scholarships or semester-only scholarships be sufficient?
<input type="checkbox"/>	3.5	Other than an academic degree, what other kinds of interventions and support should be considered for each activity's goals to ensure student success and long-term outcomes that meet development goals?
<input type="checkbox"/>	3.6	Could travel to the United States for cultural exchange, study abroad, short-term training, a study tour, or other intervention improve the impact of the activity?
4. How do you determine the size, scope, and additional programming for the budget of the scholarship activity?		
<input type="checkbox"/>	4.1	What is the ideal number of individuals to fund to achieve development objectives?
<input type="checkbox"/>	4.2	Are partnerships with national and local governments, employers, or other stakeholders possible to expand the potential impact?
<input type="checkbox"/>	4.3	What additional interventions will the implementing partner want to consider in order to supplement formal education?
<input type="checkbox"/>	4.4	Will there be adequate support and ways to engage alumni once the formal educational experience ends?
<input type="checkbox"/>	4.5	What resources are available in the students' home communities to support the students before, during, and after the scholarship?
5. How do you design for inclusion?		
<input type="checkbox"/>	5.1	Is your activity designed to be accessible and inclusive of all profiles (especially women, students with disabilities, LGBTQIA+ individuals, and older students)?
<input type="checkbox"/>	5.2	Does your activity design encourage and support student participation beyond those in the capital or large cities? Does it include students who are matriculating from historically underrepresented schools and who are from underrepresented ethnic, tribal, or political groups?
<input type="checkbox"/>	5.3	From whom can you get input so that your design is more inclusive?

CHECKLIST

6. What should be considered when planning the timeline?

<input type="checkbox"/>	6.1	Have you given enough time to work with the implementing partner and other stakeholders to be able to recruit and support the right candidates?
<input type="checkbox"/>	6.2	As the success of scholarships are based on establishing and maintaining relationships, will the activity staff be in place for the length of the activity?
<input type="checkbox"/>	6.3	Can the activity be designed to support alumni of the scholarship in a meaningful way? Can others who want to support similar goals also be supported through alumni engagement?
<input type="checkbox"/>	6.4	Are you committed to monitoring, evaluation, and learning for activity impact?

7. How do you avoid risks associated with scholarships?

<input type="checkbox"/>	7.1	Are the scholarship activity goals clear and available to all stakeholders? Will students know what they need to do to fulfill the expectations?
<input type="checkbox"/>	7.2	Does the activity require students to return and work for a specific office or entity?
<input type="checkbox"/>	7.3	Is there adequate support for students, especially in terms of advising and post-graduation employment support?
<input type="checkbox"/>	7.4	How can the activity be resilient to changes (government change, policy changes, market changes) in students' home country?