

PHILANTHROPY AND HIGHER EDUCATION

A photograph of three young women in graduation caps and gowns, smiling. The woman on the left has a red stole, the middle one has a light blue stole, and the one on the right has a purple stole. They are standing outdoors in front of a building.

# International Higher Education Scholarships and Fellowships for Social Justice: The Role of Foundations

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# International Higher Education Scholarships and Fellowships for Social Justice: The Role of Foundations

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Throughout the research, we included photographs from the Ford Foundation International Fellowships Program (IFP).

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# International Higher Education Scholarships and Fellowships for Social Justice: The Role of Foundations

## INTRODUCTION: WHY A PAPER ON THIS TOPIC?

While a lot of research has been done on the role of philanthropy in the United States' higher education system, there is considerably less literature on U.S. and non-U.S. foundations that have funded international scholarship and fellowship programs that focus on social justice, particularly in the last two decades. This study shares findings and reflections about recent initiatives and offers recommendations on what we know is working effectively in this growing landscape. This paper aims to investigate three key questions:

1. Why are U.S. and non-U.S. foundations increasingly interested in investing in international higher education?
2. Why are philanthropies currently focusing on higher education as a form of international development for social change?
3. What can we learn from recent higher education programs that have brought about positive change in social justice through scholarships and fellowships?

**Notably, we examine scholarship and fellowship programs that are committed to reducing long-standing disparities in higher education. Our study suggests that philanthropic giving for higher education initiatives that specifically promote access and equity among underserved and marginalized communities deserve critical attention and more research. This observation is the principal motive for our study.**

By answering the study's central questions, we hope this paper will be a useful resource for U.S. and non-U.S. foundations that design and support equitable higher education fellowship programs that cater to underserved individuals. Additionally, we hope we can contribute to the ongoing conversation about the importance of scholarship programs that are not just geared toward individuals with a track record of academic excellence – those seen as “the best and the brightest” – but rather those who are traditionally excluded from higher education due to their affiliation with marginalized groups, be it women; rural and impoverished populations; racial, ethnic, and religious minorities; or individuals with disabilities.

To investigate these three questions, we look at the recent development trends and key players of philanthropic giving to higher education worldwide, primarily through scholarship and fellowship schemes. We include perspectives on both U.S. and non-U.S. foundations because philanthropic giving to finance higher education scholarship and fellowship programs has grown not only from the traditional “global north” but increasingly from the “global south” as well.

The Ford Foundation's decade-long International Fellowships Program (IFP) frames our study. From 2001 to 2013, IFP supported advanced studies for social change leaders from the world's most



vulnerable populations by promoting more significant equity in higher education in 22 countries. IFP was based on an inclusive higher education model that prioritized social commitment over traditional selection criteria. Founded on the principle that higher education is an essential long-term investment for addressing major social issues, IFP integrated gender, race, ethnicity, region, economic background, and physical disability into its recruitment and selection process with two essential goals: ensuring educational opportunity for all and fostering the next generation of social justice leaders (Volkman et al., 2009).

The program enabled the vast majority of alumni to dedicate themselves to improving their home countries and communities in different fields and industries. IFP demonstrated that graduate fellowships could be “a powerful tool for reversing discrimination and reducing long-standing inequalities in higher education and societies at large and presenting new thinking about the way in which international aid could be used to help vulnerable groups reach their educational and leadership goals while giving back to their societies” (Clift et al., 2013, p. 5).

In 2013 the Ford Foundation commissioned the Institute of International Education (IIE) to undertake a research study exploring 10 years of IFP alumni accomplishments and alumni impact on their communities. Through the [IFP Alumni Tracking Study](#) we produced five evaluation publications and five thematic issue briefs, which contributed to results-based philanthropic giving (see text box).

We are learning from this study that higher education and social justice are inextricably linked. By providing access to education, a scholarship program provides access to knowledge and opportunity. This could open the door to personal and professional growth for individuals who otherwise would not have this chance. Our findings conclude that most IFP alumni feel strongly that the advanced degree they received helped them persevere in their careers and that they would not have gotten this opportunity without the support from the Fellowship (Martel & Bhandari, 2016). However, despite the study findings, our literature review and interviews suggest that newer programs are moving away from individual higher education grants toward broader higher education institutional support, such as university infrastructure, education systems, and civil society-led education efforts (Avelar & Patil, 2020).

The [IFP Alumni Tracking Study](#), administered by IIE and supported by the Ford Foundation, is designed to assess the impacts of the International Fellowships Program. Launched in 2013, this 10-year research project explores the accomplishments of IFP alumni and analyzes the impact they've had on their communities. Between 2001 and 2013, IFP supported graduate-level education for 4,305 emerging social justice leaders from 22 countries. IIE collects data at the global, regional, and country levels using a combination of surveys and local fieldwork. The study team plans to publish ongoing findings from the tracking study until it concludes in 2024.

To date, the IFP Alumni Tracking Study team has produced five evaluation publications. Each report evaluates a component of the program, such as the link between higher education and social justice, or the impact of higher education on social justice and sustainable change.

The IFP Alumni Tracking Study [Issue Brief Series](#) explores thematic issues related to IFP and its alumni, including social justice, leadership, community development, equity in education, and economic development. The series is meant to examine IFP through various research and analytical lenses and provide scholars, practitioners, and the IFP community with points of discussion and debate.

## STUDY METHODOLOGY AND DEFINING KEY TERMS

This study draws primarily on a review of U.S.- and non-U.S.-based philanthropic investments in international higher education scholarship schemes since 2000, research on international philanthropic giving in higher education, and in-depth interviews with actors working in the field. As noted in the Introduction, our focus was first to understand international philanthropic giving in higher education from U.S. and non-U.S. sources, particularly in the last two decades. To further specify the scope of the study and better frame it within the context of the IFP Alumni Tracking Study, we focused our review on foundation-sponsored scholarship and fellowship programs that support disadvantaged individuals and communities. This enabled us to make more useful comparisons between the programs.

We then engaged key stakeholders in conversations about the evolution of U.S. and non-U.S. philanthropic giving in international higher education, from both foundational and academic perspectives. For example, we interviewed strategic staff from the philanthropic sector to understand their institution's goals and mission behind this type of investment. We also spoke to academics and practitioners working on issues related to trends and theory regarding this type of philanthropic giving. Finally, we looked at specific programs and delved deeper into promising practices for promoting access and equity in higher education. We have reviewed scholarship and fellowship programs and initiatives that met the research criteria:

- **Type of scholarship/fellowship:** Scholarship and fellowship programs that support higher education pursuits (including undergraduate, graduate, postgraduate, doctorate, and postdoctoral programs), have been in existence and active for at least five years, and offer at least 20 scholarships annually. The scholarship/fellowship funding covers 50 percent to 100 percent of the cost of education.
- **Scholars/fellows profile:** Scholarships are meant for individuals from developing and emerging countries with an affiliation to one or more of the following groups: economically disadvantaged family backgrounds; women; rural populations; racial, ethnic, and religious minorities; individuals with disabilities; and orphans. Throughout the paper, we refer to these groups as “underserved” or “underprivileged” populations.
- **Type of organization:** Organizations include family-owned and family-operated organizations, private foundations, corporations, and philanthropic institutions. Public scholarships are not included in this study.

To approach the topic from a comparative perspective and to have a shared understanding of the focus and approach, we provide definitions of key terms as they are used in the context of this paper.

- **Scholarship and fellowship:** These terms are used semi-interchangeably throughout the paper to identify educational investments in individuals. They represent an amount of money that is given to a student by a school, organization, or other institution to help pay for the student's education expenses. They generally do not have to be repaid and are often awarded based on a student's academic or other achievements. Fellowships can focus on the professional development of the fellow and may be sponsored by a specific association or organization seeking to expand leadership in its field.

- **Private U.S. foundations:** A private foundation is an independent legal entity set up for solely charitable purposes. Unlike a public charity, which relies on public fundraising to support its activities, the funding for a private foundation typically comes from a single individual, family, or corporation, which receives a tax deduction for donations. Private foundations typically make grants (i.e., give funds) to public charities, although they sometimes conduct their own charitable activities (Foundation Source, 2020).
- **Philanthropy:** The desire to promote others' welfare, expressed especially by the generous donation of money to good causes. Philanthropic giving varies throughout the world and is addressed in the next section.
- **Social justice:** The fundamental principles and human rights that enable equitable distribution of benefits and burdens throughout a society. These principles and human rights are outlined in and protected by international covenants such as the Universal Declaration of Human Rights and the Convention on the Elimination of All Forms of Racial Discrimination (United Nations, 2007). The importance is placed on the equality of their distribution (Frankena, 1966).<sup>1</sup> Need-based fellowships and scholarships provide funding to individuals who have experienced a range of social injustices at some point in their lives due to poverty, ethnicity, gender, race, religion, sexuality, political discrimination, violence or war, or coming from or living in a rural area or conflict region (Jurgen, 2012).

Framing these concepts and terms allows us to approach the research from a common perspective and study philanthropic giving through this lens. This approach allows us to have a comparative perspective on how philanthropic investments in higher education – mainly those related to social justice – have developed and which elements have been most effective.

## STUDY LIMITATIONS

This research paper is not an evaluation or exhaustive historic review of foundations' support for higher education scholarships or an analysis of the effectiveness or efficiency of their support. Rather, it is a qualitative reflection of the current situation and recent trends regarding philanthropy's role in funding tertiary-level scholarships and fellowships to individuals from underserved communities to further support equity, social change, and human rights achievements. We note the inherent challenge of measuring a higher education degree's contribution to social justice advocacy.

Additionally, the aim of this study is not to describe the newer paths, trends, or different initiatives supported by foundations but to understand programs that are more or less comparable to IFP. This allows us to learn more about other, newer players and their approaches and promising practices.

Another limitation to our study is the recognition that there is limited research on evaluation studies of philanthropy programs for international scholarships, and there are different levels of transparency among philanthropies.

Finally, our aim is to illustrate research findings of programs from different parts of the world as much as possible; we note, however, the limitation of representing all existing programs equally.

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<sup>1</sup> According to philosopher W.K. Frankena, the term "justice" has a distributive dimension: the ability to allot resources, opportunities, and privileges in a comparative way. Given this distributive factor, the term is distinguished from "legal justice" by specifically referring to the distribution of social benefits and burdens.



**PART I**  
Setting the Context

**The Rise in  
Philanthropic  
Giving in  
International  
Development and  
Education**



## THE RISE IN PHILANTHROPIC GIVING IN INTERNATIONAL DEVELOPMENT AND EDUCATION

To contextualize the study, we first need to understand institutional philanthropy's increasing role in international development and education, particularly in the last 20 years. When we speak about foundations' contributions to higher education, the conversation often centers around narratives based on "filling the gap" or "filling the void." Problems of equality and access – and the gaps created between privileged and underprivileged communities – have dominated international development discourse and made a case for the need for funding expansion and allocation. Foundations have traditionally been seen as fit players to contribute to the growing demand for funding higher education scholarships.

U.S. foundations' involvement in international higher education is not new. U.S. foundations have been involved with universities and higher education networks in Africa since the 20th century. The Rockefeller Foundation's international activities started as early as the 1910s. Similarly, the Carnegie Corporation of New York deployed higher education resources in some English-speaking countries between 1923 and 1941. A number of important studies have been written on these and many other undertakings. Many of these early developments were the result of high delegations' visits to Africa that brought increased investment and involvement from U.S. foundations (Jaumont, 2016).

Today, global private foundations' investments in higher education are expanding and reshaping the development landscape. These foundations' increased investments position them as prominent players for influencing local and global education policy (OECD, 2018). However, the nature and focus of their investments vary because they adopt different approaches. Some foundations prioritize strengthening university capacity and infrastructure (A. Elwadie & C. Frittelli, personal communication, July 30, 2020); others adopt a two-pronged approach by building the capacity of a wide network of universities through which to offer scholarships for individuals (S. Bezanson, personal communication, July 30, 2020).

The Organisation for Economic Co-operation and Development (OECD) suggests that direct funding to education institutions can increase influence, accountability, and commitment, as well as customize support to address needs specific to each campus. Funding to networks can improve efficiency by supporting common goals shared by multiple universities. This also creates opportunities to share learning and test initiatives and interventions. In addition to filling the gap, the OECD identifies three other broad strategies that U.S. and non-U.S. foundations are pursuing: innovating, co-investing and influencing, and building a knowledge base (OECD, 2018).

Karen Mundy (2020), professor at the University of Toronto in Canada, notes there are multiple players and different agendas. Some of the biggest philanthropic players in international education

“... have taken a more collaborative or 'public goods' path. Some have aimed to focus on strengthening citizens and popular demand for education quality (see for example, the Hewlett Foundation); some focus on education rights and the use of education to support citizen voice, civil rights and citizenship education (Soros Foundation). Others have taken up thematic areas of focus ... [such as] 21st-century skills; education for girls, refugees and other marginalized populations. Another group [which includes the Aga Khan and Mastercard Foundations] seeks to support national capacity to achieve education for all and invests in national systems.” (p. 17)

**Philanthropic giving to education\*, 2013–2015**

Purpose description	Amount (USD million)	Share of sector total
Education policy and administrative management	534.6	25.7%
Education facilities and training	216.6	10.4%
Teacher training	94.7	4.6%
Educational research	53.4	2.65%
Primary education	134.3	6.55%
Basic life skills for youth and adults	87.6	4.2%
Early childhood education	103.7	5.0%
Secondary education	82.5	4.0%
Vocational training	139.6	6.7%
<b>Higher education</b>	<b>549.5</b>	<b>26.5%</b>

Source: (OECD, 2018[11]) Survey on Private Philanthropy for Development 2013-15: Data questionnaire [www.oecd.org/dac/financing-sustainable-development/development-finance-standard/beyond-oda-foundation.htm](http://www.oecd.org/dac/financing-sustainable-development/development-finance-standard/beyond-oda-foundation.htm).

\*philanthropic giving to education outside of the United States

Of all types of educational philanthropic giving between 2013 and 2015, higher education received the largest proportion (26.5 percent) of resources. In the same period, close to \$549 million USD for education went to scholarships and degree and diploma programs at universities, colleges, and polytechnics (OECD, 2018, p. 14). The second-largest proportion of philanthropic funding was dedicated to education policy and administrative management, representing \$535 million USD (OECD, 2018, p. 14).

As indicated in the above table from the OECD report (2018), higher education received most of its international funding from private foundations. Primary and secondary education receives most of its funding from Official Development Assistance (ODA).

Although investment in the field of higher education is growing, the priority in many developing countries is still to improve access to primary and secondary education. Despite the fact that knowledge-based economies are increasing in importance, many developing countries struggle to make higher education access an actual priority. Although higher education enrollment has doubled during the past two decades, the numbers remain significantly lower than primary and secondary school enrollments (World Bank, 2017).

## **EMERGING COUNTRIES: TWO TYPES OF FUNDING STRATEGIES**

In the context of development aid, our findings indicate that most of the leading funders from the United States and Europe focus primarily on international philanthropy. However, foundations from emerging countries are opting for two different giving approaches.

To better comprehend philanthropic giving to emerging countries, the OECD surveyed 143 foundations worldwide from 2013 to 2015 and again in 2017. In 2018 the organization released an unparalleled report on the role of private philanthropy in development. One essential finding is that foundations' level of funding, geographic focus, and areas of intervention vary. Between 2013 and 2015, Africa and Asia attracted the most education-related giving. More recent OECD data from 2017 suggests that Africa is seeing a growing concentration of funding in terms of higher education investments (OECD, 2018, p. 11). Prominent non-U.S. foundations are Vehbi Koç Foundation, Telefónica Foundation, and Li Ka Shing Foundation.

Philanthropies in emerging countries have adopted different priorities for their philanthropic giving. Some see growing wealth as an opportunity to invest predominantly at the domestic level, and others seek to invest abroad to continue to increase their influence. Foundations that are based in emerging countries mainly operate domestically, such as the Mexican Carlos Slim Foundation, the Indian Tata Trusts, the Turkish Vehbi Koç Foundation, and the Hong Kong, China-based Li Ka Shing Foundation; indeed, Turkey, China, Brazil, and Mexico are the top four countries whose foundations have invested the largest part of their higher education philanthropic giving domestically. In Brazil's case, Frederico Menino, a former educational advisor to the Brazilian Foreign Minister in New York whose PhD dissertation analyzed the recent process of internationalization in Brazilian higher education, states, "Higher education demands larger financial support investments; therefore, if you have a limited source to donate, you will first invest at home and most likely tackle basic education first" (F. Menino, personal communication, July 27, 2020). Most of the world views education as a public good that is supported by the government and, therefore, there is not the same tradition of philanthropic support for higher education as in the United States.

Among the BRICS countries,<sup>2</sup> according to the 2018 OECD report, two countries have adopted a different approach: India and South Africa have invested \$125 million and \$110 million, respectively, outside their countries in regional cross-border giving. Foundations in the United Arab Emirates (e.g., Emirates Red Crescent and Dubai Cares) represented most of the cross-border giving from foundations based in emerging countries to developing countries. Only \$62 million was identified as flowing between developing countries (from the Panama-based Avina Foundation, the Nigerian Tony Elumelu Foundation, and the Li Ka Shing Foundation) (OECD, 2018). Other countries also adopted a regional cross-border giving approach, including Kenya (\$38 million), Bangladesh (\$24 million), Colombia (\$22 million), and Peru (\$21 million).

Evidence- or result-based philanthropy is a larger phenomenon and is not only limited to emerging countries. Our findings indicate that some family foundations in emerging countries are adopting a giving strategy that has been coined "new philanthropy" or "Philanthropy 3.0" in addition to mobilizing their resources to be invested at the domestic level. As noted by Pipinis (2020), these foundations donate differently: They invest by results. Their approach is grounded in a business method focused on social issues, meaning they often work with the aim of combining social and financial returns while cultivating a better and more influential public image and reshaping the public sector (p. 96). Avelar and Patil (2020) add, "With the introduction of business and investment techniques into philanthropy and the entrance of investors and producers driven by the possibility of 'doing well by doing good,' this 'Philanthropy 3.0' enables many forms of privatization, bringing about new actors, voices and visions to education, in essence changing its very meaning and purpose" (p. 10).

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<sup>2</sup> BRICS is the group composed by the five major emerging countries: Brazil, Russia, India, China, and South Africa.



A photograph of three young women cheering enthusiastically with their hands raised. The woman in the center is wearing a red and black plaid shirt and has a wide, joyful smile. To her right, a woman wearing a grey hijab and a plaid shirt is also smiling broadly. On the left, a woman with glasses and a red top is partially visible, also appearing to be part of the group. The background is a blurred red building with white window frames. A large, semi-transparent red shape is overlaid on the bottom left of the image, containing the title text.

# Contributing Factors to Philanthropic Investments in International Higher Education

## DRIVERS INFLUENCING GROWTH IN PHILANTHROPIC INVESTMENTS IN INTERNATIONAL HIGHER EDUCATION

The study identifies four areas that have contributed to growing interest in funding international higher education programs in the developing world: (1) the push from multilateral agencies, such as the World Bank and United Nations; (2) the rise of personal wealth during the past two decades; (3) the growing global youth population and its need for higher education; and (4) the increasingly liberal government policies that encourage non-state actors to contribute and play a greater role in the field of higher education. The following section provides a historical overview of philanthropic giving in international higher education through these four lenses.

### 1. A PUSH FROM MULTILATERAL AGENCIES

In the 2000s, prominent U.S. foundations saw universities as the engines of economic development. In fact, many heads of U.S. foundations were also heads of universities, so they had a natural interest and expertise in higher education (F. Jaumont, personal communication, July 23, 2020). In 2000, the World Bank and UNESCO brought together experts from 13 countries to form a task force to explore the future of higher education in the developing world for two years. The outcome of the task force was an influential paper published in 2000, *Higher Education in Developing Countries: Peril and Promises* (World Bank, 2000). As Jaumont highlighted, “The report marked a turning point in the field of higher education in the context of international development” (F. Jaumont, personal communication, July 23, 2020). The task force concluded that “without more and better higher education, developing countries will find it increasingly difficult to benefit from the global knowledge-based economy” (World Bank, 2000, p. 15). In fact, the task force identified a number of priority areas, the first of which was funding. On this topic, the report states, “The Task Force suggests a mixed funding model [to] maximize the financial input of the private sector, philanthropic individuals and institutions, and students. It also calls for more consistent and productive public funding mechanisms” (World Bank, 2000, p. 11). The identified funding gap offered an opportunity to contribute to this field that several U.S. foundations seized.

The World Bank task force thoroughly discussed endemic and systemic discrimination concerning access and equity. Given the current study’s focus on scholarship programs that tackle issues of social justice by means of underserved communities’ access to higher education, the below passage is crucial in understanding why some U.S. foundations made the issue of social justice central to their work soon after the report was released:

Disadvantaged groups – whether they are racial, linguistic, or religious groups in specific societies, or women almost everywhere -- find it difficult to compete for places in the higher education system. They have usually received inadequate primary and secondary schooling, making further progress in education harder to achieve. For many years, certain groups have been poorly represented in higher education. This means that the faculty is likely to be unrepresentative of disadvantaged groups, and there will be real or perceived problems of institutional discrimination. A lack of role models can lead to groups concluding that higher education is not for them. Higher education is also reliant on the rest of the education system, and those who have received little primary or secondary education are clearly far less likely to progress to higher education. A long-term solution, therefore, requires public investment at all levels of the education system in order that larger numbers of well-prepared candidates from disadvantaged groups can compete for access to higher education. Higher education systems need to find a way

of reconciling the dual values of excellence and equity ... selection based on prior achievement will only reinforce a history of discrimination and underachievement. Equally, programs to increase equity will prove unsustainable if they are seen to undermine the standards of excellence on which higher education is based. Merit criteria cannot be relaxed. Awarding degrees or certificates to people who do not deserve them cannot be in the public interest. The answer seems to be to combine tolerance at points of entrance with rigor at the point of exit. Proactive efforts to attract promising members of disadvantaged groups must be coupled with well-designed, consistently delivered remedial support. With sufficient funding from public or philanthropic funds, this will clearly contribute to equity, but it has the potential to contribute to excellence as well with institutions drawing their intake from an ever-widening pool. (World Bank, 2000, p. 47)

The recommendation made a compelling case not only for the mobilization of philanthropic funds but also for those funds to work toward equity and access. Regarding the different causes that could lead to exclusion, the report suggests that scholarships that only cover studies and tuition are insufficient. Other structured fees to cover expenses related to rooms, books, and other materials can also be a source of exclusion, as many students from financially underprivileged backgrounds are unable to secure the additional funding required to complete their higher education (World Bank, 2000). The task force's proposition to tackle endemic and systemic discrimination toward underprivileged groups and create new financial mechanisms to support a broader pool of students directly links to the IFP premise on equality: in terms of financial coverage, IFP increased access and equity in higher education (Volkman et al., 2009).

### **Momentum began to build for increased participation of foundations in the field of higher education**

Four major U.S. foundations paid attention to World Bank and UNESCO recommendations and their invitations to non-state actors to invest money and know-how in higher education in developing countries, supported by Kofi Annan, then secretary general of the United Nations. The Carnegie Corporation of New York, the Ford Foundation, the John D. and Catherine T. MacArthur Foundation, and The Rockefeller Foundation launched the Partnership for Higher Education in Africa (PHEA) to coordinate their support for higher education and address the talent gap in Africa's universities (Jaumont, 2016). The foundations' partnership aimed to strengthen higher education systems in Africa and recognize that the focus on basic education was no longer sufficient. Over the course of 10 years, from 2000 to 2010, the coalition welcomed three additional foundations: The Andrew W. Mellon Foundation, the William and Flora Hewlett Foundation, and The Kresge Foundation. In total, these foundations invested \$459 million across nine English-speaking African nations (Grant Lewis et al., 2010). The coalition "directly and indirectly improved conditions for 4.1 million African students enrolled at 379 universities and colleges" (Grant Lewis et al., 2010, p. 5).

Since this study focuses on underserved communities, it is important to note that while this was a positive investment in African higher education systems, its impact was limited to a select set of countries and universities.

Although the African continent is home to myriad living languages and dialects in addition to the principal colonial language – mainly French, English, Arabic and Portuguese – the foundation coalition only targeted English-speaking countries, widely accepted as the global common working language (Jaumont, 2016). Additionally, Jaumont (2016) adds, the case of language and the reasons why U.S. foundations systematically launch programs in former British colonies is a topic that deserves a study of its own.



In fact, a few foundations are increasingly focused on this topic of higher education resource distribution across the African continent to ensure that funding is not always invested in “traditional” or English-speaking countries to the exclusion of other linguistically diverse countries. Aware of this growing unequal resource distribution due to language affiliation, the Mastercard Foundation and the Open Society Foundations are expanding their university network to non-English-speaking countries such as Senegal, Burkina Faso, France, and Lebanon (S. Bezanson, personal communication, July 30, 2020; A. Elwadie & C. Fritteli, personal communication, July 30, 2020).

### **The shift from Millennium Development Goals (MDGs) to Sustainable Development Goals (SDGs)**

The overarching goals of both the MDGs (2000-2015) and SDGs (2015-2030) are to end poverty, protect the planet, and ensure that all people enjoy peace and prosperity. Although investments toward higher education scholarship programs increased between 2000 and 2015, momentum was truly achieved with the integration of higher education goals in the SDGs (Valk, 2015). Fortunately, the post-2015 development framework has given greater emphasis to the role of higher education.

During the U.N. Sustainable Development Summit in September 2015, in a commitment to ensure greater higher education access worldwide, 193 countries adopted the SDGs, which consisted of 17 goals for a more equitable and peaceful world. Pertinent to higher education, SDG Goal 4 is to “ensure inclusive and equitable quality education and promote lifelong learning opportunities for all”; subsequently, target 4.b reads:

“... by 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries.” (United Nations, n.d.)

In a recent review of international educational philanthropy efforts, Campbell and Neff (2020) noted:

“The inclusion of scholarship programs in the U.N. SDGs brought the topic of international higher education and student mobility to newfound levels of international prominence ... within the SDGs, education is featured prominently, both as a goal itself and as a mechanism to reach other goals – with international scholarships as one of the educational tools identified ... countries have signed on to the SDGs, and by extension, a commitment to increase the number of international scholarships, propelling these programs into the limelight. However, we have little empirical knowledge about whether and how scholarships lead to sustainable development in ‘least developed countries’ and raise questions as to whether all scholarships are intended to lead to development goals.” (Campbell & Neff, 2020, p. 2)

In an effort to better track and disseminate progress toward SDG Goal 4, the Global Education Monitoring (GEM) report (UNESCO, 2020) represents a mechanism for monitoring and reporting on education. This report reflects on worldwide efforts to promote higher education scholarship programs, particularly those promoting equity and access. Funded by a group of governments, multilateral agencies, and private foundations and facilitated by UNESCO, the GEM report discusses the enduring challenges of inclusion in education, particularly in the developing world. Though much progress has been made since the early 2000s, many of the challenges examined in the 2000 World Bank/UNESCO report (discussed above) persist today (UNESCO, 2020). For instance, while 68 percent of countries have a

definition of inclusive education, only 57 percent of those definitions cover multiple marginalized groups. Also, despite making progress, many countries still do not collect, report, or use data on those left behind. Finally, issues around segregation are still prevalent in many parts of the world (UNESCO, 2020).

However, we noted an important gap. SDG 4 only collects data on government-funded scholarship programs. Therefore, scholarship/fellowship programs discussed in this report would not be captured toward Target 4.b. The challenges we note with these reporting mechanisms do not include nongovernment funding, including philanthropies, and generating a representative baseline for measuring progress toward SDG 4 is impossible as long as the focus is only on accounting for government-funded scholarships.

To tackle this challenge and better track scholarships and fellowships supported by foundations, the UNESCO GEM report (2016) suggested:

“Given that non-profit organizations (primarily foundations) and corporations currently play a significant role in funding scholarship programs that specifically target recipients from developing countries, their responsibility to provide data on their scholarship recipients and towards monitoring the progress of target 4.b should not be ignored. Yet, it raises the issue of how such private entities can be held accountable for providing such data given that they typically do not operate under any sort of governmental or other mandate to gather and report such data. As suggested above, one incentive for them to gather and report this type of data might be the accountability standards of external rating organizations like Charity Navigator.” (p. 18)

Our literature review indicates that newer players are entering the higher education philanthropy arena and supporting a wide range of scholarships and fellowships. The rise of personal wealth across the globe is propelling these new players to play an active role of giving in their communities and in communities beyond their borders – the second element of our study that helps explain increased giving in the field of higher education.

## 2. GROWING PERSONAL WEALTH ACROSS THE WORLD

During the 1980s and 1990s, philanthropic giving for education in the developing world focused almost exclusively on access to primary education; basic education was therefore accorded the highest priority in terms of development goals. However, things changed in the early 2000s. The 2007/08 economic crisis first caused an economic slowdown in the United States but ultimately had consequences worldwide, such as depressed wages, austerity, and profound political instabilities (Fligstein & Rucks-Ahidiana, 2015). In the same landscape, however, there was riveting growth in private wealth. The abrupt decrease in financial flow positioned philanthropies as key development players, particularly in less developed countries.

Worldwide, a class of high-net-worth individuals<sup>3</sup> (HNWIs) has been on the rise. According to the World Wealth Report published by Capgemini (2018, 2020), HNWI wealth and population grew by almost 9 percent globally in 2019 despite a global economic slowdown, international trade wars, and geopolitical tensions. More than 60 percent of the world’s HNWI population lives in the United States, Japan, Germany, and China. More private wealth means more philanthropic giving and more significant

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<sup>3</sup> High-net-worth individual (HNWI) is a person or family with liquid assets above a certain figure. The most commonly quoted figure for membership in the high-net-worth club is around \$1 million dollars in liquid financial assets.

influence. Private foundations were, in fact, presented with growing opportunities to contribute to international development in different sectors – higher education being one of them (Capgemini, 2020). The rise of these new private philanthropic investments, which did not exist 30 years ago, have influenced the notion of giving to higher education (F. Menino personal communication, July 27, 2020).

Surprisingly, despite the 2008 financial crisis, wealth accumulation picked up again in 2010. In places like the United Arab Emirates, China, India, and Brazil, more concentrated family wealth resulted in more foundation establishments. Inequality also grew in recent years, concentrating higher income among the wealthiest and those who position themselves as “partisans of change” (Giridharadas, 2018). With increased personal wealth around the globe, several family and corporate foundations emerged, and we continue to see the creation of new foundations. From Brazil to Zimbabwe, these foundations are playing a pivotal role in bridging the higher education equity and access gap.

Trends and priorities shifted, and private philanthropy began to grow in different parts of the world. Old and new players alike have changed the landscape of higher education philanthropy thanks to growing individual wealth in emerging countries. Although philanthropic ecosystems in the United States and Europe are the most mature, giving from other nations is on the rise, as is the case in China and India, where education is the favored cause of philanthropic choices (OECD, 2018, p. 24). In recent years, China and India accounted for record numbers of newly established foundations. Their substantial investment in education testifies to their dedication to contribute to knowledge-based economies through research, science, and technology; investments in these fields have transformed their skilled labor pools (OECD, 2018).

The OECD report *Private Philanthropy for Development* (2018) emphasizes that philanthropic funding is crucial for two different groups of countries. On the one hand, it is essential for low-income and least-developed countries where basic human needs are still a great challenge, and international aid is therefore a critical revenue source. On the other hand, philanthropic funding is also important for upper-middle-income countries approaching the established threshold to receive ODA assistance.<sup>4</sup> For example, the report mentions that countries like Brazil, Mexico, or South Africa might soon no longer classify as ODA recipients and are therefore attempting to mobilize resources from other sources. At the same time, governments are increasingly de-subsidizing higher education, resulting in less state funding and a void to fill. That is to say, both groups see philanthropy as an alternative source of financial support (OECD, 2018, p. 24).

While family and corporate foundations are not purely selfless in their giving - incentives include recognition through patronage and naming of education buildings, for example, as well as tax benefits (F. Menino, personal communication, July 27, 2020) - they do demonstrate a commitment to promoting educational access. The following three examples illustrate private foundations that were created as a result of growing family wealth and influence.

Jorge Paulo Lemann made a fortune in the beverage and investment sector and founded the Lemann Foundation in Brazil in 2002. The Foundation created Ponte de Talentos, a program that helps low-income Afro-Brazilian and Indigenous students pursue postgraduate degrees in the United States, and, in turn, promotes greater racial and economic equity. The Foundation offers full scholarships for Afro-Brazilian postgraduate students through partnerships with the W.K. Kellogg Foundation and the Baobá Fund. More recently, the Foundation announced that Brazilians from underprivileged backgrounds accepted to the University of Illinois at Urbana-Champaign would have 100 percent of their tuition

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<sup>4</sup> The threshold to receive ODA is a per capita gross national income of \$12,745.



and living expenses covered. Foundation Fellows are expected to return to Brazil upon their degree completion to drive meaningful social change. To date, all Lemann Foundation programs combined have supported more than 700 young Brazilian leaders. The Foundation reported that 100 alumni are currently working in the public sector, and seven were elected to statewide or national office in Brazil in 2018 (Lemann Foundation, 2020).

Another compelling example of a family foundation fighting educational inequality is the case of the Higherlife Foundation, founded in Zimbabwe in 1996 by Strive and Tsitsi Masiyiwa. The Masiyiwas, who made their fortune in the telecommunications field, believe that business must be a force for positive change in the community in which one works. The founders also believe that philanthropy is not charity but a way to address fundamental issues and find solutions.<sup>5</sup> They have championed all-level education access for orphans and vulnerable populations in Zimbabwe. Through scholarships, fellowships, and educational material support, Higherlife Foundation is a pioneering African family foundation that advances social justice via educational access. Among the different programs the Foundation supports, the Higherlife Foundation Delta Philanthropies Doctoral Research and Fellowship Program is particularly relevant to our study. This Fellowship program aims to develop critical skills needed to advance the national economy and promote a generation of new knowledge and innovations that will contribute to the country's Vision 2030 goals. In addition to targeting underserved communities that would not usually have access to postgraduate education, the program launched in collaboration with Zimbabwe's Ministry of Higher and Tertiary Education, which demonstrates a priority alignment between the Foundation and the country's education department.

In addition to supporting underserved communities, some family foundations focus their investment on specific fields across an entire region. That is the case of Abdulla Al Ghurair Foundation for Education (based in the United Arab Emirates), created by billionaire businessman Abdulla Al Ghurair in 2015 and now one of the largest of its kind in the Arab region. The Foundation offers bachelor's and master's degree scholarships for exceptional students with a passion for science, technology, engineering, and math (STEM) regardless of their circumstances. The Foundation is well known for creating opportunities to activate the untapped potential of Arab youth, providing underserved, high-achieving students with the scholarships, support, and skills training they need to thrive.

These three foundations are illustrative examples of the many newly emerged corporate and family foundations in the realm of educational philanthropy. As personal wealth and investments in higher education continue to grow, there is a pressing need to develop and implement regulatory frameworks and tax policies in these nations. As mentioned earlier in the study, the field of philanthropic giving has a long history in Europe and the United States, where global private foundations operate with very different tax frameworks than in other countries that may not have regulations at all. In their work on educational philanthropy in the Middle East and North Africa (MENA) region, Ridge, Kippels, and Bruce (2019) find that

*“government regulations seem to be in need of greater examination in order to learn if they are indeed conducive to incentivizing wealthy individuals or companies to establish philanthropic organizations. If there are too many barriers or not enough incentives, then it may well be that fewer and fewer people or organizations decide to enter the philanthropic space. In recent years in the Gulf countries, there has been a significant tightening of the laws around establishing*

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<sup>5</sup> Interview during the 2019 African Philanthropy Forum: <https://www.youtube.com/watch?v=xkfZXZP8s58>

charitable organizations in general, and, anecdotally, this has caused a number simply to close up shop. While there indeed might be good reasons to have greater regulation of the sector, this could be done in consultation with existing actors in order to enable greater levels of philanthropy.” (p. 84)

The sooner countries in regions with an increased number of foundations supporting higher education establish tax regulations around philanthropic giving, the more money foundations will be able to invest domestically and worldwide.

### 3. GROWTH OF YOUTH POPULATIONS AND ACCESS TO HIGHER EDUCATION

A third lens to consider when analyzing the expansion of international scholarships in higher education is the beneficiary population of these scholarships. The focus on higher education in the SDGs stemmed from the expansion of youth populations entering secondary and tertiary education around the world, as well as the need to measure the education pathways of these groups (Martel, 2019). According to the U.N., the youth population between ages 15 and 25 numbered 1.2 billion in 2019, or around one in every six persons worldwide (United Nations, 2020). “Youth bulge,” the phenomenon of a growing global youth population – particularly in developing countries – is accelerating the rush to make higher education a priority. As youth populations mature, the number of students pursuing tertiary education is expected to increase. This combination of growing tertiary enrollment and growing university-age populations indicates a demand that may outweigh supply of higher education options. As a result, governments and philanthropic donors are investing in increasing access to higher education in home countries and abroad.

If the demand for higher education increases as more students reach university age, the current capacity of domestic higher education markets will likely be unable to keep up with growth in matriculation. Enrollment of students in universities and colleges as a percentage of all eligible for such study is low.

One cause of this is the limited stock of public and private tertiary education options. According to PIE News, between 2010 and 2015 only 26 percent of the 10 million applicants to Nigerian tertiary institutions gained admission, indicating there are many students who may be looking for opportunities to pursue higher education who do not gain acceptance to local universities (Parr, 2018). In Bangladesh, with a total

#### Tertiary School Enrollment (% , Gross), Top Populated Countries

	2015	2018
United States	80.64	88.17*
India	10.68	28.06
Indonesia	17.23	36.31
Pakistan	4.92	9.08
Bangladesh	6.45	20.57
Nigeria	10.49	10.17**

\* Latest data available for 2017

\*\* Latest data available for 2011

Reference: UNESCO Institute of Statistics, 2019

population of 160 million, only 120 universities and colleges are accredited and registered. Russia, the next largest developed country with 140 million people, has 718 higher education institutions by comparison (International Association of Universities, 2021). With such disparity in the academic options available, students from these countries face difficult decisions about whether to pursue tertiary education and the limited options available to them.

In these cases, international scholarships can provide the necessary opportunity for youth beneficiaries to pursue university study. International scholarship programs funded by philanthropic donors focus on the availability of university options with the hypothesis that access to higher education can improve professional pathways for these individuals, grow a skilled workforce that meet the current demands of the labor market in the developing world, and contribute to sustained economic and social growth (World Bank, 2017).

The provision of higher education in itself is not the only solution. While access to university study may increase, a limitation is also whether the initiatives provide equal opportunity. This is where international scholarships or fellowships for social justice play a critical role. Programs that focus solely on academic excellence, for example, are more likely to select beneficiaries from privileged backgrounds, contributing to a growing gap in youth from upper and lower economic strata. That is why higher education programs related to social justice or providing opportunities for beneficiaries from underprivileged or marginalized populations is critical.

In addition to the equitable provision of higher education support, the other dire consequence is an educated youth population that cannot be absorbed by the local labor market or economy. We have witnessed this in different parts of the world throughout history.

*“It has been suggested that when countries respond to large youth cohorts by expanding opportunities for higher education, this may produce a much larger group of highly educated youths than can be accommodated in the economy. Unless the government is able and willing to absorb a surplus of university graduates into the public sector, prevailing unemployment among highly educated segments of youth may cause frustration and grievances that could motivate political violence.” (Winckler, 2002, p. 622)*

High unemployment among educated youths is arguably one of the most destabilizing and potentially violent sociopolitical phenomena in any regime (Nazili, 1974). Indeed, a rapid increase in the number of educated youths has preceded historical episodes of political upheaval (Goldstone, 2001). For example, the expansion of higher education in many countries in the Middle East produced large groups of educated youth that the labor market cannot absorb. Over time, this has had a radicalizing effect and provided new recruits for militant organizations in the region (Lia, 2005, p. 145).

If the provision of higher education and economic opportunity is not adequately addressed, youth bulges have the potential to make countries more susceptible to political uprisings. Urdal (2006) suggests that “the expansion of higher education can serve as a strategy to reduce the risk of political uprisings” (p. 3).

#### 4. LIBERAL GOVERNMENT POLICIES ENCOURAGING NON-STATE ACTORS TO CONTRIBUTE TO HIGHER EDUCATION

Education is the pillar for a healthy society and is central to economic growth and development. Skilled individuals are likely to contribute to national prosperity. Higher education is commonly viewed as a vector to promote income growth and increase efficiency and competitiveness at both the individual and societal levels. The world is increasingly transforming and becoming more connected, focusing greater attention on higher education. This transformation has positioned higher education at the forefront of the international development agenda (Volkman et al., 2009, p. 21).

States are recognizing that reaching higher education goals in the coming years will require considerable funding. The increased financial need to support and prepare a growing youth population is leading to higher education privatization policies and reforms. As a result, governments and multilateral organizations are embracing non-state actors, such as foundations, to play a larger role as education investors in areas such as university partnerships, individual grants, and human services (Avelar & Patil, 2020). Governments increasingly rely on private investments for several reasons. In some countries, private investors are filling the void left by deteriorating social welfare and decreased public funding for higher education, and philanthropic support has provided access to higher education for minorities that would otherwise be marginalized (F. Menino, personal communication, July 27, 2020).

Determining the appropriate role of non-state actors in education is a critical conversation to have. Liberal policies present both opportunities and challenges. Questions around quality, equity, and financial sustainability are on the table, and efficient coordination between state and non-state actors is necessary. If states welcome and embrace foundations and other non-state actors to play an increased role in the higher education field, many elements beyond financial and technical support must be considered. For instance, there is a need for more data to design interventions that best support access, equity, and diversity.

#### LINKING CURRENT CONTEXT TO PROMISING PRACTICES

Our study reveals that higher education scholarship and fellowship programs that have *common agendas*, whether between donors and academic institutions or between government and international partners, often lead to sustainable partnerships and better program outcomes because they are supported by more than one entity and are grounded in shared goals and visions.

Indeed, there is an increasing number of foundations investing in higher education; however, large-scale foundation initiatives that break down barriers to the pervasive challenges of underrepresented social groups' access are not widespread. Although the themes of access and equity have risen to the top of the higher education development agenda, their outcomes differ considerably from one context to another. Exclusion factors are also very different. The roots of these inequalities could be the quality of secondary education, geographical isolation, differentiation within ethnic and racial groups, lack of access to information, or simply being born or living in a region characterized by chronic marginalization. Therefore, programs that intend to tackle these issues should not opt for a one-size-fits-all approach, particularly if the program is implemented in multiple countries or in a country with significant disparities.



Themes of access and equity need to be embedded in national-level policy changes that promote greater inclusiveness in higher education, but this alone is not enough. There are many instances where ambitious laws are drafted and put into place, yet nations struggle with implementation and follow-through because enforcing laws requires a genuine commitment to a cause which, in turn, requires the deployment of resources to carry out. In addition to more inclusive policy changes, bridging the gap of exclusion also requires the active engagement of several stakeholders. These efforts must include individuals from underrepresented backgrounds, foundation employees, particularly design program teams, university staff, and local partner organizations committed to working with and reaching out to underrepresented groups. It takes more than one actor to change the practice of exclusion. Every actor is responsible for ensuring that equity and access are not just words used in program files but also beliefs embedded in their vision, mission, and actions. The need to continuously advocate for and implement a comprehensive strategy, rather than a piecemeal approach, is fundamental to dismantling endemic barriers to higher education and benefiting underserved communities.

Recognizing power dynamics is another important element. Foundations with social justice agendas have a responsibility to invest their funding where it will best be used to bring about long-lasting change for those who need it the most. To do so, several key questions must be addressed first: How can foundations select, engage, and build the capacity of local universities that are also committed to equity and access? How do foundations guarantee they are listening to the most marginalized voices and integrating their input into program design? Are foundations favoring a bottom-up program design that is considerate of all voices? What are the roles of local partners and civil society? How is accountability checked? We aim to investigate some of these questions by highlighting a few distinctive, promising practices and initiatives that narrow the inequality gap and contribute to social justice in higher education. As discussed in the study limitation section, the examples cited below are by no means exhaustive or geographically representative. We intend them to shed light on practices that have proven to work and have a long-lasting impact. These initiatives may be used to inspire future program design or scale-up efforts, or advocate for more efficient collaboration among different stakeholders with the common goal of increasing access to higher education scholarships and fellowships.

## **PART II**

### Promising Practices for Promoting Access and Equity in Higher Education

A photograph of four individuals standing outdoors in a grassy area. From left to right: a man wearing a blue headwrap and a blue and white striped shawl; a man in a red and white patterned traditional outfit with a red headband; a woman in a white and pink patterned headscarf and a bright yellow-green jacket; and a woman in a beige headscarf and a black top. The background is a blurred green landscape.

## **Targeted and Integrated Program Approach**



## TARGETED AND INTEGRATED PROGRAM APPROACH

The recently released UNESCO GEM 2020 report identifies five fundamental principles to target and support higher education for marginalized individuals, one of which is tailoring programs based on local context and existing needs. A promising practice in this area is the design of personalized programs for underserved students to support their university experience, including orientation, study and life skills training, mentoring and pastoral support, psychosocial support, and workplace preparation.

Findings from the Ford Foundation's IFP, Mastercard Foundation Scholars Program, Dell Young Leaders program, and the Moshal Scholarship Program provide solid scientific evidence that the practice of offering individual scholarships improves university access among vulnerable and underserved individuals (Volkman et al., 2009). These programs did more than just offer scholarship programs; they favored a tailored approach that often centered on individual needs that go beyond the financing of their degrees.

Ford Foundation's IFP (2001–2013) was a ground-breaking program that had a unique and unprecedented approach in its scope and funding. IFP positioned higher education as a central issue of social justice rather than an instrument to increase national economic competitiveness (Volkman et al., 2009). In that sense, the program shifted the discourse on the role of higher education in the development ecosystem. The human development approach to philanthropic giving adopted by the program, which financed advanced higher education for more than 4,300 underrepresented individuals and supported them to further their potential in different fields, was a successful model that should continue to inspire the design of similar programs. In fact, IFP had many features that speak to its tailored and integrated approach. For instance, recipients used their fellowship in the country of their choice, which expanded the university network the program inherited. The program did not include a foreign language test, and it provided preprogram English training. Selection criteria that focused on the most underserved individuals provided information on the socioeconomic background of the person, as well as their commitment to social causes as an indication that the individual has a strong commitment to giving back. Favoring this selection approach, "the program would create a model for expanding the definition of excellence to reach beyond the standard of academic measures in the search for new leaders" (Volkman et al., 2009, p. 40).

Another example of a tailored and flexible program design is the Dell Young Leaders program. Launched in 2010, the program was designed to tackle the challenge of access to higher education for students in need. The Foundation has chosen to focus much of its developmental effort in South Africa on students from backgrounds that are both educationally and socioeconomically disadvantaged because the intersection of these harsh living conditions results in formidable obstacles to success. This target group represents young people who are collectively the most vulnerable section of the student body – educationally, psychologically, socially, and culturally (Michael and Susan Dell Foundation, n.d.).

The program is relationship-based, supporting students in a holistic manner by providing support in four key areas: (1) academics: ongoing progress check-ins, coaching, and academic resources; (2) finances: allocations for textbooks, food, transport, and advice on other financial matters; (3) wellness: campus support, alumni mentorship program, and everyday health guidance; and (4) career: skill, leadership, network development, and interview support. Additionally, the program ensures that staff is available for the students on each campus to guide them through everyday university tasks and coach them through their own unique challenges as they move into their careers (Michael and Susan Dell Foundation, n.d.).

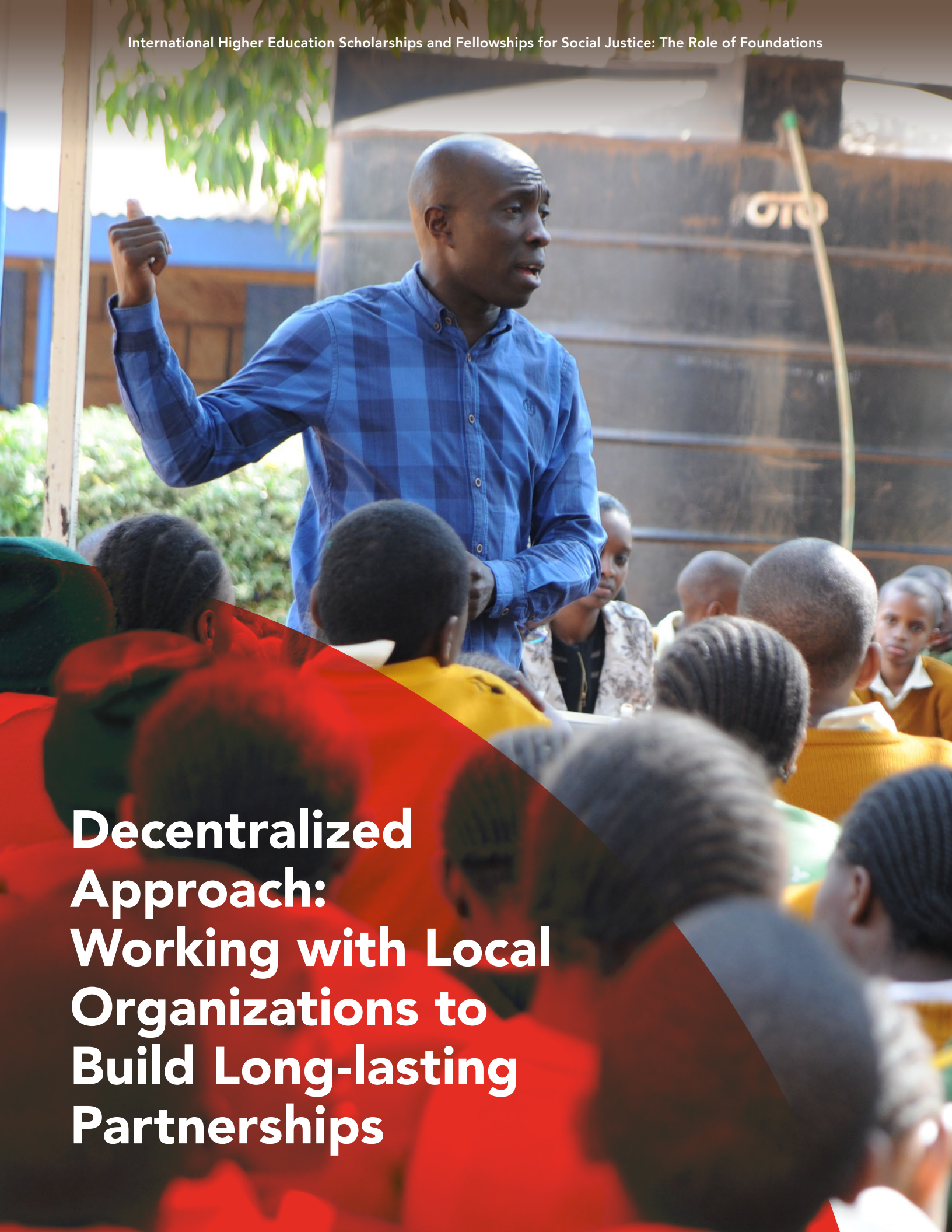
Dell's approach aims to tackle areas of students' lives that are often overlooked by higher education programs. Recognizing that underserved populations often deal with overlapping challenges, the individualized level of attention, availability, and resources the program affords its students unquestionably provide the mental, academic, and personal support scholarship programs need. That is to say, financing a scholarship alone is not enough.

Another scholarship program that recognized and opted for an integrated program approach is the Moshal Scholarship Program. Established in 2009 by Martin Moshal, the program provides both financial and moral support to motivated students from underserved backgrounds as they obtain high-quality, sought-after degrees that lead to successful careers. To date, the program has granted more than 900 scholarships to students from South Africa, Ukraine, and Israel (Moshal Scholarship, 2018).

Designed to be highly personalized, the program recognizes that even among the same group of underserved students, personal challenges shape the factors that could hinder the successful completion of a scholarship. Therefore, providing individual counseling after the selection process is of the utmost importance. For instance, scholars are expected to participate in the Moshal community and encouraged to volunteer in their own communities. In South Africa, the program introduced an early warning system to trigger "at-risk students," monitor their academic progress, and communicate any risks to their academic advancement so students could adapt accordingly. The program offered regular face-to-face support meetings and addressed significant life events promptly (UNESCO, 2020).

The Mastercard Foundation Scholars Program, created in 2012, was also designed to address insufficient and inequitable access to higher education. By design, and similar to IFP, the program aims to serve individuals with demonstrated leadership potential who have traditionally been overlooked by educational systems. These include young women and economically disadvantaged, displaced, or rural youth. The program offers comprehensive scholarships to youth primarily from Africa and seeks to identify and educate next-generation leaders from these disadvantaged, underserved groups, helping to drive a process of social and economic transformation in their communities, countries, and ultimately the African continent (Cosentino et al., 2019). The program's integrated and comprehensive approach has been an inspiring model for many other scholarships. Its precept is that for the development of leaders through scholarships and education five key areas are deployed: (1) university education, (2) 21st-century skill building, (3) transition and employment support, (4) a give-back component, and (5) a scholars and alumni network. In 2019, the Mastercard Foundation announced an additional 15,000 scholarships that are currently enabling academically talented but vulnerable African youth to pursue higher education in Africa. It is set to award 483 scholarships every year until 2030. This expansion is part of the Foundation's 2018-2030 overarching strategy, "Young Africa Works." A more recent higher education initiative by the Foundation includes 1,000 scholarships for disadvantaged students in partnership with the United States International University-Africa (USIU-Africa) in Kenya. The scholarships are geared toward high-potential university students facing financial, gender, displacement, or disability constraints. At least 70 percent of the scholarships will be allocated for young women, while 25 percent will be allocated for displaced or refugee youth, and at least 10 percent will be held for young people living with disabilities. USIU-Africa becomes the latest addition to the Mastercard Foundation's expanding global network of partners, which it says is committed to "developing a generation of African leaders who will use their knowledge and skills to lead change in their communities and contribute to meaningful transformation across the continent" (Ligami & O'Malley, 2020).





**Decentralized  
Approach:  
Working with Local  
Organizations to  
Build Long-lasting  
Partnerships**

## **DECENTRALIZED APPROACH: WORKING WITH LOCAL ORGANIZATIONS TO BUILD LONG-LASTING PARTNERSHIPS**

A second promising practice to integrated scholarship programming requires the collaboration of key stakeholders, particularly those in local communities. Establishing and nurturing partnerships with a network of local partner organizations is paramount because it safeguards local understanding and access. Local partners that represent civil society organizations (CSOs) can support student identification based on preestablished socioeconomic and demographic criteria, student outreach, advertisement of scholarship opportunities, and application screening. Forging partnerships with local CSOs that are already working with underprivileged communities can greatly contribute to the visibility of a scholarship program among targeted populations, help identify the most vulnerable students, and encourage them to apply. There is a level of trust in existing relationships that makes this approach more efficient than sending out general calls for applications from a scholarship program that may potentially be unknown to local communities. IFP provides evidence that closely working with local partners enabled community buy-in and afforded a better understanding of the local context (Volkman et al., 2009).

The Mastercard Foundation Scholars Program was built as a partnership to foster new collaborations. The Foundation developed a vision and sought out organizations – including universities and nongovernment organizations (NGOs) – that would help execute that vision (S. Bezanson, personal communication, July 30, 2020). The organizations needed to provide high-quality education, directly by enrolling and supporting applicants (in the case of university partners) or indirectly by helping applicants enroll in universities and providing other supports throughout their studies (in the case of NGO partners). The partners needed to be willing to expand their recruitment efforts beyond the students they would usually recruit. They also needed to seek more links with organizations to facilitate mentorship, leadership training, service learning, and professional development opportunities, including internships. To do so, partner universities and NGOs forged partnerships or strengthened existing ties with local organizations – other NGOs, schools, universities, employers, or community-based organizations. As the program evolved, these partnerships flourished to enhance the educational opportunities available to students and extend the reach of available funding. The experience of the Scholars Program suggests that building partnerships holds promise for scaling up the use of scholarships as promoted through the SDGs. To succeed in this effort, partnerships may need to consider: (1) leveraging actors across sectors to implement scholarship programs successfully; (2) developing local solutions – programs tailored to the local policy context; and (3) monitoring outcomes through meaningful measures (Cosentino et al., 2019).



A photograph of a woman with dark hair, smiling warmly as she interacts with a group of students in a classroom. The students are looking towards her with interest. The scene is set in a room with wooden paneling and a bookshelf in the background. A large red graphic overlay is present in the lower-left and center of the image, containing the title text.

# The Role of Higher Education Institutions in Furthering Social Justice and Inclusion

## THE ROLE OF HIGHER EDUCATION INSTITUTIONS IN FURTHERING SOCIAL JUSTICE AND INCLUSION

Our findings indicate that even if foundations might not explicitly use the language of social justice, increased attention is given to equality, access, and inclusion. When seeking a new collaboration, foundations such as Open Society Foundations and the Mastercard Foundation look for alignment of values with higher education institutions (HEIs) (M. Loerke & V. Starkov, personal communication, August 17, 2020).

To deliver higher education scholarships and fellowships, foundations establish and nurture a network of partner universities through which program fellows and scholars can apply. Our findings indicate that several prominent foundations have a vast network of partner universities in different parts of the world where grantees can apply and pursue their higher education. Yet how can foundations ensure that they engage with HEIs that are dedicated to increasing the enrollment rate of underserved individuals? For instance, in searching for partners, a foundation may ask: Is the institution committed to inclusion? Does it have a track record of reaching out to young women? Does it have a quota in place for disabled student admission, etc.? Recognizing that underrepresented groups are particularly excluded from higher education, it is key to understand what the foundation and partner universities are doing together to explicitly break down those access barriers and put in place initiatives and policies to increase higher education access to those who traditionally would not have it (S. Bezanson, personal communication, July 30, 2020). Another promising practice is to revise recruitment policies and encourage universities to prioritize academic merit regardless of an applicant's social or financial background.

Additionally, HEI/foundation partnership reviews have to be done more frequently by considering a series of key performance indicators (KPIs) such as having a goal to increase the enrollment of underrepresented populations each year. Our interviews revealed that, while partnerships are reviewed every 10 years on average, all members of the partnership stand to benefit from a shortened review cycle. Making sure that foundations that support social justice programs are partnering with devoted HEIs is a priority. Reassessing these partnerships more frequently allows for better tracking of equity and access indicators because we are operating in an increasingly unbalanced world where challenges around equity and access evolve rapidly.

An additional element that foundations can consider when selecting HEIs is the level of diversity universities have among their faculty members; this indicates the university's commitment to diversity and inclusion. A university with a diverse faculty is more likely to advocate for diversity values in general, even when selecting its students (UNESCO, 2020).

Shona Bezanson, head of the Mastercard Foundation Scholars Program based in Kigali, Rwanda, noted that another promising practice is to set broad selection criteria for applicants who are academically talented but socioeconomically disadvantaged, demonstrate leadership potential, and are committed to giving back to their communities. She added that although these are broad selection criteria, they rely on partner universities to aspire to inclusion. Similarly, partner universities may not explicitly use the language of social justice but can be committed to it nonetheless.



A photograph of two women in traditional African attire. The woman in the foreground is wearing a yellow and blue patterned headwrap and a black top, looking intently at a document. The woman behind her is wearing a red headwrap and a white top with red embroidery, pointing towards the document. The background is a blurred indoor setting with a framed picture on the wall.

# Measuring the Impact of Higher Education Scholarships and Fellowships

## MEASURING THE IMPACT OF HIGHER EDUCATION SCHOLARSHIPS AND FELLOWSHIPS

Increased philanthropic funding to international scholarships and fellowships sheds light on evidence for return on investment and the importance of measuring outcomes and successes of such initiatives, especially the social impacts of investing in individuals for social justice. For this reason, a more concerted focus on monitoring and evaluation (M&E) within philanthropies has gone beyond the more general notion of “investing for the global good” and has in some programs led to rigorous evaluation techniques to measure change over time (OECD, 2019).

The premise of international scholarship and fellowship programs often rests in the investments made in individuals and their ability to leverage this opportunity to create change on a broader scale (Martel, 2018). [The IFP Alumni Tracking Study](#) and the Mastercard Foundation Scholars Program (Mastercard Foundation, 2020) are two programs that invest in rigorous evaluation to connect individuals to social change. By focusing on longitudinal impact over time, both of these studies can map the pathways of social changemakers from the time they receive their scholarship or fellowship to several years beyond their initial experience. For such studies, the critical marker is how the program has influenced an individual’s trajectory and how this trajectory then impacts others.

The timing of evaluation is critical to measure long-term impact, and funders need to consider the investment in measuring success over time. As mentioned earlier, individual recipients’ pathways, whether through longitudinal tracking or impact assessment, can require considerable investments in funding and time. Capturing data from alumni and their networks can also be difficult if evaluations occur several years after a program has finished. Finally, commitment to ethical and equity-based evaluation also means that evaluation techniques involving scholarship alumni bring benefits in the form of qualitative data collection beyond surveys and quantitative techniques. As Jennifer Case, Department Head and Professor in the Department of Engineering Education at Virginia Tech, notes, “We need to find ways to work with large sets of narrative data – become more sophisticated in using observational and documentary data to learn to work comparatively across contexts in a close-up mode” (Case, 2017, p. 8). These methods collectively speak to the importance of setting out an evaluation strategy and adapting it as the program evolves.

### Using data and evidence to drive the change needed for improvement in education

and dismantling systemic barriers to higher education is the mission of Education Sub Saharan Africa (ESSA), a network of higher education actors that includes the more than 400 African universities affiliated with the [African](#)

### [Association of Universities](#)

(AAU) and foundations such as the Robert Bosch Foundation, the Jacobs Foundation, and the Mastercard Foundation.

The network was created in 2016 with the goal of using data and creating appropriate methodology to shape and influence higher education.

In addition to being a strong advocate for data- and evidence-based decision-making, the network aims to promote Africa’s development by expanding the education system throughout the continent. It offers access to services such as a Scholarship Impact Hub, a platform for managing and developing a range of scholarships in Africa with the goal of improving the impact of existing funding programs and encouraging further investment in similar initiatives.

The cost of investments in scholarships and fellowships is another area worth exploring. Scholarships for Change by Candid (see text box) is a tool that provides perspective on the types of investments philanthropies (predominantly in the United States) are making in international scholarships and fellowships worldwide. Simultaneously, more rigorous cost-benefit analyses are needed to understand the overall cost and returns of large philanthropic investments. Scholarships and fellowships can be quite costly, particularly when they are designed to provide adequate financial and administrative support. This cost can increase even further when working with marginalized populations, as was the case with IFP. In this context, the program considered and implemented the necessary additional costs to prepare emerging social justice leaders for higher education study.

In some cases, this included critical training of six or nine months well before the recipient began their academic studies (Volkman et al., 2009, p. 170). The value of analyzing costs and benefits can inform the specific investments offered to individuals as part of scholarship and fellowship schemes, their outcomes or impacts individually and on society, and the scalability of these investments. Learning from such analyses can inform other programs, particularly those focused on providing higher education access to marginalized groups.

Finally, investment in M&E can be part of an ongoing process to inform program design internally. It can also benefit the philanthropic sector and the field of international higher education. Commitment to this type of evaluation should be met with commitment to disseminate learning to inform other philanthropic programming. In this sense, M&E can be a powerful tool to inform foundations and philanthropies that are looking to design and finance models using evidence-based decision-making for sustainable change.

**Scholarships for Change** by Candid\*


is a free, open-access platform with a set of tools designed to help donors increase the impact of scholarship giving. Funded by the Ford and Mellon Foundations, **Scholarships for Change** provides funding trend data, an interactive grants map, **GrantCraft case studies**, and a curated knowledge center that together serve to orient, inform, and empower donors with a road map to effective scholarship philanthropy.

**The website** explores and tracks how

private and community foundation donors use scholarships as a force to accelerate the broader change they hope to see around the world. It pulls together data and knowledge to tell the story of how philanthropic dollars support transformative scholarships and to guide funders in the practice of scholarship grantmaking.

\*Candid operates research, education, and training programs designed to advance knowledge about philanthropy at every level and provides under-resourced, nonprofit organizations with the tools they need to better fulfill their missions.





# Concluding Thoughts and Consideration for the Future

## CONCLUDING THOUGHTS AND CONSIDERATION FOR THE FUTURE

Higher education remains a key pathway for social mobility and economic opportunity. Equally important, promoting educational opportunities for the most underserved populations continues to be a worldwide priority. If individuals are not presented with the same opportunities, the equity and access gaps will widen, and social mobility and economic opportunity will be compromised. Globally, there is an increased demand for equality in higher education access, and this demand will continue to grow due to the expanding youth population worldwide and the need for more competitiveness – a key driver to prosperous nations.

In the years to come, foundations will continue to play an important and growing role in higher education. If philanthropy can fill gaps, innovate, and test new approaches, it can complement and support higher education as a public good as long as foundations work toward the same goals with other stakeholders. In addition to seeking close collaboration and common ground with ministries of education, HEIs, and local CSOs, foundations play an active role advocating for inclusion by funding scholarship programs that tackle issues of social justice and break the marginalization cycle.

**Strategic Stakeholders' Collaboration and Cooperation** – Providing marginalized individuals with financial support alone is often not enough. Promoting multi-stakeholder coordination and integrated financial, social, emotional, and job market support can further help people from disadvantaged communities overcome their challenges to completing their higher education. Every stakeholder has a role to play, and every stakeholder needs a seat at the table – donors, state representatives, HEIs, CSOs, and members of the community. Foundations should encourage strategic stakeholders' collaboration and cooperation. Inclusivity should also be practiced among the different stakeholders involved.

**Education Reforms to Better Support Underserved Individuals** – Beyond financial support from foundations, the challenge of higher education access and equity also has to be analyzed through a sociopolitical lens of governments and systems that might be perpetuating the same inequalities that marginalized these populations in the first place. There is a need for large-scale higher education reforms to tackle underlying systemic problems, as well as interventions on various scales to solve pervasive access and equity challenges. Education reforms need to address inclusion by ensuring that different ministries – particularly the ministry of education – collaborate to identify needs and jointly design inclusion programs.

**Collecting Data on and for Inclusion** – Ministries and national statistical agencies and foundations funding scholarships must collect more accurate, timely, and relevant data. If used appropriately, data will help identify inequities, set national priorities, and highlight areas for improvement. Without data, policymakers and researchers cannot evaluate program outcomes, nor will they be able to use evidence to advocate for more inclusivity. Useful data on access, achievement gaps, and inclusivity will not only improve opportunities for underserved communities but will help foundations grant higher education scholarships and fellowships to targeted communities based on evidence.



Foundations must continuously use data and learn from past programs to inform their current and future programming. Programs that document the impact of their intervention contribute greatly to evidence-based decision-making and philanthropy, but here too more data is needed. Foundations from emerging economies in particular have yet to recognize the importance of systematically evaluating their programs and making their reports public. Our study found that a majority of foundations from emerging countries do not publish much beyond program goals and number of recipients.

**Individual Grantmaking** – Although our findings indicate that some U.S.-based foundations are moving away from individual grants to provide more institutional support, we believe that evidence from programs such as IFP shows that individuals can impact systemic change. It also demonstrates that graduate fellowships could be “a powerful tool for reversing discrimination and reducing long-standing inequalities in higher education and societies at large.” (Clift et al., 2013, p. 5). This is not to say that one approach matters more than the other, but perhaps a hybrid model that supports both institutions and individuals is the best path.

**Strengthening the Role of CSOs** – While recognizing there are some challenges around power dynamics between local CSOs and donors, civil society still has an important role to play at the local level. Grassroots organizations are the most connected to the communities they work with; they have access and know how best to engage with them. Engaging in meaningful consultation with members of the community ensures buy-in, trust, and access to individuals that foundations might not have otherwise. Members of the community might include alumni from previous programs who can have a role in the selection committee or help with outreach strategies. By doing so, foundations and academic institutions can leverage their alumni networks.

**Looking Forward** – We conclude by reflecting on the following questions: If higher education philanthropy in the form of scholarships and fellowships contributes to advancing SDGs, should inclusivity be a requisite component for all programs? As non-state agents, foundations tackle public matters and continue to grow and expand their influence through their financial support and partner university networks; what are their responsibilities in the event of failure or unintended negative consequences, and how are they held accountable? As suggested by Avelar and Patil (2020), there is a collective need to deepen knowledge of the sector (p. 9) and continue to research and shed light on promising practices that contribute to greater access for underrepresented individuals and the best use of the money invested by foundations worldwide. ■

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Finally, we would like to dedicate this report to all development practitioners designing, researching, and supporting equitable higher education fellowship programs that cater to underserved individuals.

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