

August 2023

# OPEN SOCIETY SCHOLARSHIP PROGRAMS EVALUATION REPORT

OPEN SOCIETY  
FOUNDATIONS

## EXECUTIVE SUMMARY

The leadership of the Open Society Foundations' Scholarship Programs commissioned this external evaluation to examine the impact of over 30 years of individual grant making activities with a particular focus on the issue of access. While the primary audience for this report is the Open Society Foundations' Reassigned Grants Unit, the broader aim is to contribute to a wider discussion within the Foundations as it continues considering strategic ways of contributing to civil society building through education engagement. What follows is a summative evaluation for both internal and external stakeholders to highlight how access to higher education through individual grant making has (or has not) contributed to building open societies, along with documenting any particularities of the Open Society Foundations' approach toward scholarships.

The evaluation report is organized into the following nine sections—Introduction, History, Scholarship Programs' Theory of Change, Evaluation Framework, Methodology, Findings, Discussion, Recommendations and Conclusion.

This evaluation focused on three primary evaluation questions (EQs) with a particular focus on the criterion of access. EQ1 was “How did the Scholarship Programs facilitate greater access to education for its 20,000 awardees?” EQ2 was “How did the Scholarship Programs inform higher education institutions' notions of access and how was that institutionalized (if any)?” And EQ3 was “What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility? Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?”

Using a mixed method approach (survey, document analysis, and focus groups/interviews), the evaluation found how the Scholarship Programs' co-funding model operationalized the Foundations' core commitments (building civil society, promoting democracy, fostering critical thinking, and advancing human rights) as it sustained a dedicated investment in individual grant making for more than three decades. Applying a socio-ecological model to examine awardee's engagement and impact at various levels, the evaluation team found that the lived experiences of the evaluation participants illustrate a compelling case for Open Society Scholarship Programs' theory of change, i.e., providing people greater access to educational opportunities exposes them to different ideas and will contribute to building liberal civil societies globally in the long run. Finally, the evaluation concludes with five recommendations for the Open Society Foundations.

**Recommendation 1:** As a philanthropy, the Open Society Foundations should continue to be a thought leader in the higher education and philanthropy space.

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**Recommendation 2:** Create monitoring, evaluation and learning frameworks for grant making work that will continue within the Foundations.

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**Recommendation 3:** If the Open Society Foundations continue to engage in more limited individual grantmaking, they should maintain a lean, centralized staff to provide coordination and partnership cultivation support across the network.

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**Recommendation 4:** Develop (or strengthen) alumni networks and support through national foundations.

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**Recommendation 5:** Allocate funds to facilitate partnerships between higher education initiatives to create an ecosystem of relationships and engagement.

# ACKNOWLEDGEMENTS

This evaluation report is a summative evaluation of the Open Society Foundations' Scholarship Programs, which was concluded as a program area in the fall of 2021. The leadership of the Scholarship Programs commissioned this external evaluation to examine the impact of over 30 years of individual grant making activities across the Foundations with a particular focus on the issue of access. The point of contact was transferred from the Scholarship Programs to the Reassigned Grants Unit in 2022. The evaluation was conducted between June 2022 and May 2023. The evaluation project co-leads—Drs. Elise S. Ahn and Kate McCleary—are grateful for the support we received from both the Scholarship Programs and Reassigned Grants Unit teams throughout this period.

We would like to say “thank you” to the different evaluation participants—Scholarship Programs alumni and university representatives—for sharing their time and perspectives. In particular, we would like to acknowledge the insights and commitment to the work of advancing democracy articulated by the Scholarship Programs alumni. We would also like to express our appreciation to Scholarship Programs Director Martha Loerke for her interest and initiation of this evaluation, as well as her willingness to share her institutional memory and valuable insights during the evaluation process.

Special thanks to Zarina Usmanova, along with Tracee Nwafor and Vanessa Adjei, for their efforts and support in shepherding the evaluation through until completion.

Thanks to Diana Famakinwa, PhD, Alexis Bushnell, PhD, and Tenah Hunt, PhD, for their support in the data collection and analysis process. Their efforts are reflected in many of the materials that were included in the Appendices of the technical report deliverable. This evaluation would not have been possible without their timely contributions and expertise.

Finally, on behalf of the alumni who participated in the evaluation specifically and the 20,000+ Scholarship Programs alumni broadly, we would like to convey a special “thank you” to the Scholarship Programs team over the years. Many scholarship programs alumni evaluation participants conveyed their appreciation for the support they received from the Scholarship Programs team before, during, and in some cases, after their programs. Participants also indicated that the scholarships were instrumental in creating the current generation of leaders who are working toward civil society building. On their behalf, we also wanted to convey appreciation to George Soros for his commitment to building open society through individual grant making for more than three decades.

Elise S. Ahn, PhD

Kate McCleary, PhD

## TECHNICAL NOTE

This section provides an overview of factors that informed or impacted this summative evaluation. First, it should be noted that the original design of the evaluation included involving students at the University of Wisconsin–Madison who were interested in the broader area of international education to contribute to the data analysis and visualization phase of the evaluation through a graduate seminar. The seminar was intended to provide a meaningful research-practice learning experience for the students and concurrently enrich the evaluation with the diversity of perspectives and insights they would have contributed. Unfortunately, due to different logistical issues, it was not possible to offer the course.

Another factor informing this evaluation was the evaluators' own positionalities. Both evaluators are PhDs, trained within comparative and international education, and have extensive experience in the field of evaluation. Dr. Elise Ahn is a scholar-practitioner whose work focuses on language and education change in Turkey and Turkic Central Asian countries who became familiar with the Open Society Foundations through the Foundations' Scholarship Programs Summer School program. She was a summer school instructor from 2015 through 2018 and provided additional support as a scholarship semi-finalist interviewer. Finally, in her role as the director of the International Projects Office, Ahn led University of Wisconsin–Madison's work as a host university for two cohorts of Open Society Civil Society Leadership Award scholarship fellows between 2019 and 2022. Dr. Kate McCleary has worked in the field of international education for 20 years. Her early work in the field was in higher education student mobility and intercultural learning. McCleary's research focused on issues of gender equity and youth agency in Central America. From 2017 to 2019, she carried out an evaluation of an international scholarship program for undergraduate students at an R1 university. She is currently the Associate Dean of High Impact Practices in the International Division, which includes overseeing two scholarship programs: Fulbright and the University of Wisconsin–Madison based King-Morgridge Scholars program. As an able-bodied, middle-class, white, straight, CIS-woman socialized within the United States, McCleary engages in ongoing reflective practices to mediate the learned biases that she has internalized and the privilege that she holds. Both evaluators brought their positionalities, experiences, and expertise to this evaluation.

A third factor that impacted this evaluation was the longevity of individual grant making at the Open Society Foundations. The evaluation team drew from a rich set of documents collected from the Scholarship Programs and other artifacts (websites, book chapters, and articles). However, there are gaps in the historical timelines and partner information because the evaluation team was unable to locate the information in the documents. We acknowledge that the lack of personal institutional memory was a limitation as external evaluators and we appreciate the time and documents shared by the Scholarship Programs team to mitigate this limitation. But these gaps also provide opportunities for both continued work for the Reassigned Grants Unit and the Open Society Foundations to develop more systematic monitoring, evaluation and learning protocols for the Foundations moving forward. Because the Scholarship Programs (and then the Reassigned Grants Unit) commissioned this evaluation, the primary audience for this evaluation is these units. Our hope is that the learnings and recommendations from this evaluation may contribute to the Open Society Foundations continued leadership in individual grantmaking.

Four principles informed our writing. First, the American variety of English was used for the evaluation's writing and spelling conventions. Second, the grants and scholarships that the Open Society Foundations have given over the last 30 year have often been associated with or administered by the Scholarship Programs (see Section II.A). To describe this evolution of grant making and scholarships clearly, this evaluation will primarily use the terms "Open Society Scholarship Programs" and/or "Scholarship Programs." Terms used to describe the entire Open Society Foundations organization are "Open Society Foundations," "Open Society," and the "Foundations." Third, "OSF" appears in many of the direct quotes in this evaluation that speakers use as a general reference to the organization as a whole or to its various initiatives and programs such as the Scholarship Programs. Open Society Communications has lightly edited evaluation participant quotes for punctuation, grammar, and clarity, clarity without intending to alter the original meaning or intention. Finally, to distinguish between internal and published documents, for internal documents, the document author, listed date, a brief descriptive title, and the notation "internal document" have been provided in the End Notes; however, they have not been included in the Works Cited section.

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# LIST OF ABBREVIATIONS

| <b>Abbreviation</b> | Name                               |
|---------------------|------------------------------------|
| <b>AY</b>           | Academic Year                      |
| <b>CSLA</b>         | Civil Society Leadership Award *   |
| <b>EQ</b>           | Evaluation Question                |
| <b>FCO</b>          | Foreign Commonwealth Office (U.K.) |
| <b>OSF</b>          | Open Society Foundations *         |
| <b>OSI</b>          | Open Society Institute *           |

\* Indicates programs or units that were administered within or affiliated with the Open Society Foundations

# I. INTRODUCTION

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Since the post-World War II era, one prevailing assumption has been that higher education is a key component of establishing and maintaining a democratic society. For example, in a report produced by The President's Commission on Higher Education (1947), initiated by U.S. President Truman, the authors argued that the two lynchpins for a democratic society were the rule of law ("the law of the land") and education, which is "necessary to give effect to the equality prescribed by law" (p. 5). The report went on to observe that "[i]t is a commonplace of the democratic faith that education is indispensable to the maintenance and growth of freedom of thought, faith, enterprise, and association" (p. 5). Not only has education been seen as a vehicle for fostering freedom of thought and speech, but as the international community transitioned into post-World War II reconstruction efforts, increasingly international actors like the International Bank for Reconstruction and Development posited that education was critical to reconstruction efforts.<sup>1</sup> Later, other multilateral organizations like the World Bank would make education a key component of poverty reduction in developing countries.

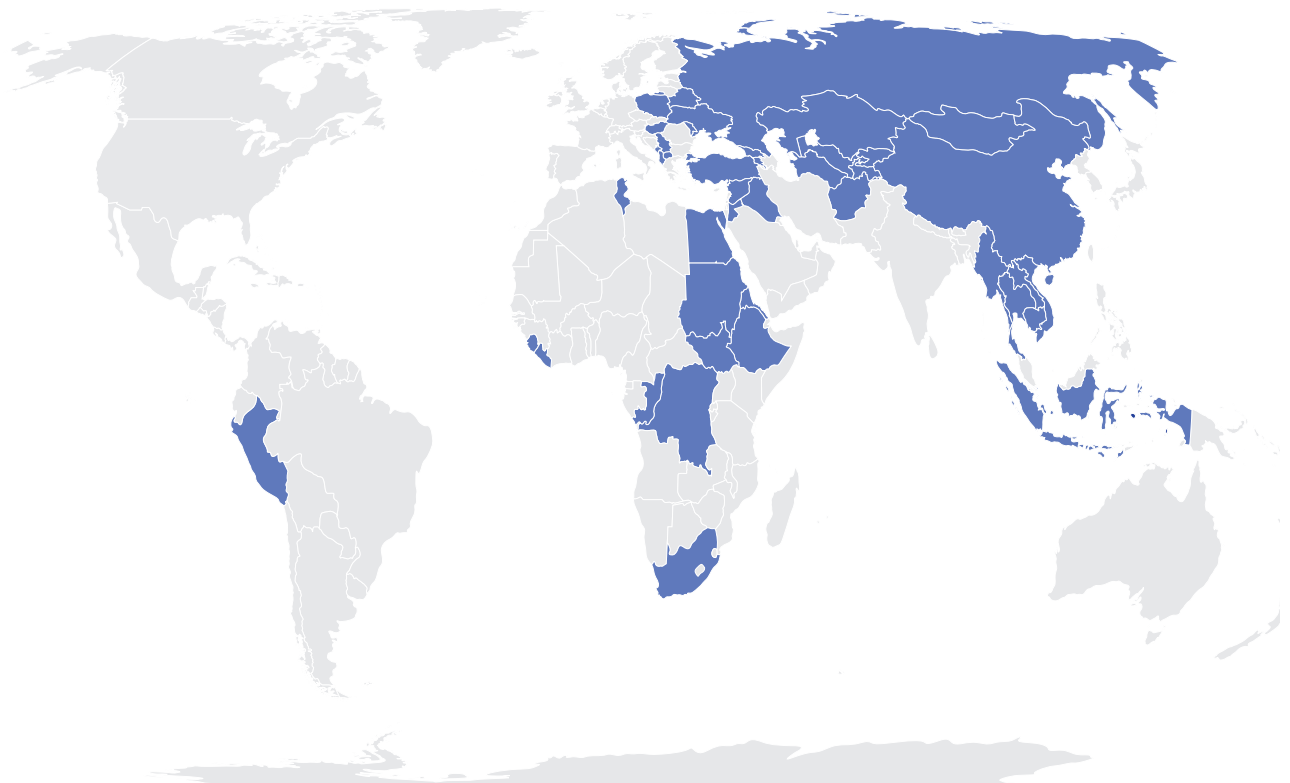
This context provides a backdrop against which the Open Society Foundations approach regarding "scholarships as a means of social change" has been informed since the early years of the Scholarship Programs. For George Soros, education has been a consistent institutional mechanism to increase access, foster greater global equity, and promote democratic governance. His own undergraduate studies at the London School of Economics in the 1950s took him away from Hungary at a time when Hungary had started to lose its luster during the Soviet occupation."<sup>2</sup> Soros's self-described interest to pursue higher education as a way to "gain a better understanding of the strange world into which I [he] was born" demonstrated how he saw education as informing and influencing how people perceived the world.<sup>3</sup> Furthermore, his own experiences with philanthropy during his student years had a formative impact on the way in which he saw philanthropy as facilitating (or hindering) educational experiences.<sup>4</sup>

Soros's ideas around education evolved over time. By 1979, he saw education as a critical piece to building and supporting civil society development. He first engaged in South Africa by supporting Black students with scholarships during apartheid and then later in Eastern Europe and the Soviet Union by supporting Soviet (and post-Soviet) dissidents and civil society leaders. Soros posited that the "ability to engage in critical thinking [was] an important element of democratic governance in an open society."<sup>5</sup>

*During more than three decades of individual grant making, the Open Society Foundations funded over 20,000 scholarship recipients across 48 countries.*

The Open Society Foundations' approach to civil society building through education has historically been two-fold—individual grant making and institution-building. In 2021, the Foundations' leadership observed that there was a global shift toward populism defined increasingly by xenophobia, (re)emerging authoritarian regimes, and increasing repression of free speech and academic freedoms. Relatedly, it seemed that the “very concept of a ‘university’ is increasingly vulnerable to ideological and political threat. These developments suggest a different direction for Open Society’s involvement with universities as change agents, causing us to reconceive our involvement with scholars.”<sup>6</sup> Subsequently, the Open Society Foundations decided to sunset the Scholarship Programs to shift primarily toward larger, institution-focused grant making through consortia like the Open Society University Network.

**Figure 1.** Geographic overview of the Open Society Foundations' Scholarship Programs' focus countries over time



## I.A. Evaluation Questions

Given its decades-long engagement in individual grant making, the impetus for this evaluation was to examine the impact of the Scholarship Programs on open and civil society building by focusing on three evaluation questions (EQs).

**EQ1**—How did the Scholarship Programs facilitate greater access to education for its 20,000 awardees?

**EQ2**—How did the Scholarship Programs inform higher education institutions’ notions of ‘access’ and how was that institutionalized (if any?)

**EQ3**—What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility? Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?”

These EQs were developed in collaboration with then Scholarship Programs Director with Martha Loerke, along with others, in the fall of 2021. After being awarded the project, the University of Wisconsin–Madison evaluation team and the Scholarship Programs agreed to focus the evaluation on issues of access and change. As the Scholarship Programs was closed, the Open Society Foundations’ evaluation point of contact was then transferred to the Reassigned Grants Unit.

This is a *summative evaluation* for both internal and external stakeholders to highlight how access to higher education through individual grantmaking has (or has not) contributed to building open societies, along with documenting the particularities of the Open Society Foundations’ approach toward scholarships.<sup>7</sup>

## I.B. Operational Terms

This section lists some operational terms that are utilized throughout this evaluation report. The operational terms have been defined using descriptions found in the Foundations’ internal documents. By doing this, the evaluation team was attempting to ascertain if the Scholarship Programs met the criteria it was using to measure its success.

Access is a key concept in the evaluation questions. UNESCO’s 2015 report on educational access initially focused on access in relation to a child’s ability to attend school or not attend school.<sup>8</sup> The focus was on physical access versus zones of exclusion across both primary and lower-secondary grades.<sup>9</sup> Moving from the primary and secondary space to tertiary education, Vieira do Nascimento et al.’s (2020) report on access to higher education over the last two decades highlighted some of the same challenges

across primary, secondary, and tertiary education, but focused on making the case for relevance of tertiary education within the global context. As Vieira do Nascimento et al. (2020) argued, “Without a doubt, higher education must be viewed as an enabler in human development and functionality...” (p. 25).

Situated within the 2030 UN Sustainable Development Goals (SDGs), Vieira do Nascimento et al. (2020) argued that universal access to higher education should be considered to be a human right and a driver for economic development (pp. 8, 15–17). By achieving SDG 4 (quality education), 1 (poverty reduction), 3 (health and well-being), 5 (gender equity and governance), 8 (decent work and economic growth), 12 (responsible consumption and production), 13 (climate change), and 16 (peace, justice, and strong institutions) will be furthered. In this way, access is not limited to the equitable and physical ability to enroll in an institution of higher learning, but also should include the full spectrum of opportunities made available through the post-secondary and post-tertiary experiences.<sup>10</sup>

Change is defined in terms of both impact and agency. Within the Scholarship Programs, change was critical at both macro- and micro-levels. Macro-level social change focuses on shifts toward a more open and civil society through micro-level change (through individual grantmaking). At a macro-level, change has been characterized as the change from a closed country (which is characterized as being repressive and having a disregard for human rights) to open (which may be characterized by a commitment to the rule of law and democratic norms). In an internal document, Network Scholarship Programs Interviewer Guidelines (2011), change was defined as developing “critical thinking, innovative problem solving and international networks” with a focus on fostering “cross-cultural tolerance, free and open intellectual debate, and [a] nuanced understanding of the complex realities challenging open society development.” Although the Scholarship Programs’ internal language and criteria shifted over time, the core focus on how a scholarship could change or impact an individual remained generally focused on (1) providing a different educational experience in a context that could foster critical thinking; and (2) supporting the awardee in developing a diverse network.

*Access is more than physical access to higher education opportunities. Examinations of access should include: examinations of quality, gains in knowledge and skills, an accessible curriculum, the opportunities that the educational experience then proffered, and equity to education with a focus on access of historically marginalized groups.*  
(Lewis, 2015, pp. 37–38)

Thinking about *changemakers* then (i.e., the potential awardees), criteria included:

[Being] passionate about improving their knowledge and their ability to advance positive social change in their home countries. University-based education will empower these individuals to explore and develop intelligent and humane ideas generated by free and open inquiry, critical analysis, and a nuanced understanding of the complex challenges facing open societies.<sup>11</sup>

As the foundational construct that underpins the work of the Open Society Foundations, the concept of *the open society* has been discussed in numerous Foundations documents. George Soros (2017) provided a brief overview of the development of his understanding of the open society, sharing that “I see the open society as occupying a middle ground, where the rights of the individual are safeguarded but where there are some shared values that hold society together.”<sup>12,13</sup> The open society may be defined as:

...the positive aspects of democracy: the greatest degree of freedom compatible with social justice. It is characterized by the rule of law; respect for human rights, minorities, and minority opinions; the division of power; and a market economy. The principles of the open society are admirably put forth in the Declaration of Independence. But the Declaration states, “We hold these truths to be self-evident,” whereas the principles of the open society are anything but self-evident; they need to be established by convincing arguments.<sup>14</sup>

Over time, it seems that the concept of the open society was used interchangeably with the concept of *civil society*. The *Oxford Language Dictionary* defined civil society as the “organizations within a society that work to promote the common good, usually taken to include state-run institutions, families, charities, and community groups.”<sup>15</sup>

Finally, a *theory of change* is a set of concepts, processes, and milestones that help explain an outcome or the achievement of a goal. A theory of change is essentially an articulated road map from the starting point (which could be a need or identified problem) to the destination (the short, mid, and long-term outcomes).<sup>16</sup> In grantmaking, theories of change may serve a dual function—to be the “rationale and clarification of strategy for a set of related grants.”<sup>17</sup>

## I.C. Methodology Overview

To explore these questions, the University of Wisconsin–Madison evaluation team’s work was guided by principles from culturally responsive evaluation.<sup>18</sup> It was thus critical to understand and describe the broader context of the work of the Scholarship Programs. The evaluation team scheduled meetings with the Scholarship Programs between September 2021 and February 2023 (both virtually and in-person) to better understand the broader socio-cultural-political context of both the unit and the scholarship awardees. In addition to ongoing meetings with the Scholarship Programs team (before the end of 2021 and then with the Reassigned Grants Unit after 2021), three data collection methods were used in this evaluation—document analysis, surveys, and focus group/interviews. Table 1 provides an overview of the three data collection methods and the participant yields.



**Table 1.** Overview of the evaluation data collection methods

| Method                   | EQs      | Stakeholder Focus   | Duration   | Sample (n) |
|--------------------------|----------|---|--|------------|
| Document analysis        | EQ1-EQ3  | The Open Society Foundations, organizational partners, awardees | Phase 1: October 2021–May 2022<br>Phase 2: July–September 2022 | n=977      |
| Survey (institutions)    | EQ2, EQ3 | Organizational partners   | November–December 2022   | n=25       |
| Survey (awardees)        | EQ1, EQ3 | Awardees  | December 2022–January 2023                                     | n=626      |
| Interviews <sup>19</sup> | EQ2, EQ3 | Organizational partners   | January–February 2023  | n=9        |
| Focus groups             | Q1, EQ3  | Awardees  | February 2023  | n=48       |

## I.D. Challenges

There were several challenges that emerged during the course of the evaluation. **First, defining the evaluation, i.e., the object of evaluation, was more dynamic than anticipated.** Because the scope and purview of the Scholarship Programs had changed over the course of 30 years, what constituted the scholarships portfolio was expansive and diverse. While this was extremely interesting to the evaluation team, it also posed a challenge in delimiting the evaluation within the contracted time period. This was addressed by prioritizing post-graduate scholarships which had been administered after academic year (AY) 2011–2012 (which were largely the Civil Society Leadership Award and Disability Rights scholarships).

**A second challenge was conducting an evaluation during a time of organizational change.** Because the Foundations were sunsetting the Scholarship Programs unit amidst an organization-wide reorganization process, this meant that there were several substantial delays due to staff turnover throughout the organization. These transitions also meant that there was limited access to people who had institutional knowledge and documentation related to the Scholarship Programs. While the evaluation team was able to go to the Open Society Foundations’ New York office to scan and collect various documents, the lack of a systematic process offboarding of long-standing Scholarship Programs staff was a limitation to collecting historical data and documents in a more coordinated and timely fashion. However, despite this challenge, the evaluation team greatly appreciated people who did make their expertise and institutional memory to the evaluation team to confirm and correct program historical information.

**A related challenge was the evaluators' role as external evaluators.** Although the evaluators were familiar with the work of the Scholarship Programs, as stated in the Technical Note, Open Society Foundations' individual grant making work spanned more than three decades. While the evaluation team drew extensively from internal documents and fact checking meetings with Martha Loerke and the Reassigned Grants Unit, there are gaps in the historical narrative of the development of individual grantmaking within the Foundations due to lack of internal institutional knowledge.

**The final challenge was related to conducting and scheduling interviews.** After months of negotiation, the Open Society Foundations' New York legal team determined that the Reassigned Grants Unit would send out the different survey invitation links to mitigate potential risks they had identified. Due to these negotiations, the survey distribution timelines were delayed by two months. The institutional surveys were eventually distributed in late November and the response period closed in December 2022. The awardee surveys then went out late December and the response period closed in January 2023. Since the focus groups and interviews were then determined through an opt-in approach on the surveys, the survey distribution delay then extended the focus group and interview phase from the end of January through end of February 2023. Finally, because of inconsistent access to the internet globally, a number of first round focus group participants were unable to sign on during the time they had expressed interest in participating. This was then addressed by doing a second round of focus group interviews at the end of February 2023 to ensure greater alumni participation.

# II. HISTORY OF THE SCHOLARSHIP PROGRAMS<sup>20</sup>

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## II.A. Scholarship Programs Development Timeline

In 1986, the first main Soros-funded scholarship program began with 23 scholars from Hungary and Poland, who enrolled in programs at Oxford University (England). This scholarship scheme was created by the Soros Foundation in Hungary and the Stefan Batory Foundation (Poland) in partnership with the U.K. Foreign and Commonwealth Office and Oxford University.<sup>21</sup>

In the early 1990s, the Consortium for Academic Programs was created within the Open Society Foundations' New York office to “coordinate scholarships across the emerging network.”<sup>22</sup> The consortium supported the administrative components of the scholarships including “application production, recruitment, selection, orientation, stipends, academic materials, international travel, conferences, and partial tuition depending on the host university’s cost-share ability.”<sup>23</sup> The consortium worked centrally for the Foundations, while also sharing employees with nine national foundations within and outside the United States. The early years of the program positioned the consortium as an intermediary between the Open Society’s national foundations with which they co-funded scholarship recipients. The Consortium for Academic Programs also collaboratively administered other programs such as the Open Society Institute/Chevening Awards, the American University in Bulgaria fellowships, the Cambridge and Oxford Hospitality Schemes, and the Central European University Scholarships.<sup>24</sup> In 1994, the consortium eventually became the Network Scholarship Programs, which then funded 4,000 individuals per year through 124 scholarship programs.<sup>25</sup>

In the late 1990s, a variety of new initiatives—Burma Supplementary Grants, Environmental Programs, Mongolia Professional Development, and the Undergraduate Exchange Program—were developed. These programs further diversified where scholars were coming from and going, as well as the themed tracks for programs. The Faculty Development Program was launched in 1997. The program allowed grantees to spend one semester a year for three years at a Western university and expanded non-degree research access for graduate students and junior faculty.<sup>26</sup> Support for Open Society Foundations-affiliated Education Advising Centers throughout Eastern Europe was initiated during this time. In 1996, the Network Scholarship Programs Budapest office was established to provide scholarship support for Central European University-bound students, along with scholarship awardees going to institutions in the United Kingdom, and more broadly, outside the United States.<sup>27</sup> The creation of the Budapest office was a pivotal moment for

the program as it brought an “international dimension” to the office and administration of the scholarships.<sup>28</sup> The expansion of staff from Hungary, as well as other locales, brought new perspectives on the protocols, guidelines, and policies of the Network Scholarship Programs. Having staff in Hungary, and the exchange of staff between the New York and Hungary offices, allowed for culturally relevant perspectives on the scholarships work and fueled greater insights on the context of the applicants and awardees. Other new initiatives in Germany, France, the EU, and the United States were then initiated after 1998.<sup>29</sup>

In 2006, the Network Scholarship Programs Budapest office was moved to London. Then, in 2011, the Network Scholarship Program was renamed the Open Society Scholarship Programs. The Open Society Foundations were an early adopter of a transparent process that granted awards directly to individuals despite the bureaucratic protocols required to do so. Throughout the 2000s, the Scholarship Programs—by then a pillar division of the Open Society Foundations—narrowed its scholarship regions within the Former Soviet Union (FSU) and expanded to include conflict/post-conflict countries, broadly defined, in the Middle East and North Africa (MENA), sub-Saharan Africa and Southeast Asia, and Guatemala and Haiti, as well as a small program focusing on North Korean refugees residing in South Korea.

These different shifts in regional and country-level prioritization were situated within the broader context of the Scholarship Programs and may be further divided into *geo-political* and *organizational*.

In terms of the *geo-political context*, the dissolution of the Soviet Union and the collapse of the Eastern Bloc meant that the countries George Soros had seen as “closed” then had the potential to become “open.” The Open Society Foundations then engaged or initiated various activities to foster open society including: engaging in the expansion of national foundations throughout Eastern Europe and the newly established countries that were part of the former Soviet Union; administering the Edward S. Muskie fellowship to build up capacity in different sectors; and establishing Central European University in Budapest, Hungary.<sup>30,31</sup> Ten years after the collapse of the Soviet Union, the next significant geo-political event was the terrorist attacks in the United States on September 11, 2001, and the subsequent “War on Terror.” In addition to reframing what constituted “threats to democracy,” there was a diplomatic acknowledgement across the United States and Europe that more outreach and engagement was required with Muslim communities. This resulted in an expansion of the Scholarship Programs’ geopolitical focus (in conjunction with partners like the British Foreign and Commonwealth Office) to engage beyond the former-Soviet Union and Eastern Bloc countries like Indonesia and Turkey, and the Palestinian and the West Bank territories.<sup>32</sup>

In terms of *organizational context*, it is critical to understand the way in which the Open Society Scholarship Programs developed over time. Soros noted that the nexus of scholarships, philanthropy, and educational access was formative to his personal lived experience and informed how he saw philanthropic engagement from early on.<sup>33</sup> This ethic underpinned the work of the Scholarship Programs for over three decades. Other key activities or initiatives which impacted the Scholarship Programs included the establishment of the Network Scholarship Programs in Hungary. Having a regional office with a diverse team who were deeply familiar with the former Soviet Union and the broader

region was critical to effectively disseminating information about scholarships, as well as informing how scholarships were administered and awarded. Other critical moments then included 2013 and 2020, which marked two significant shifts in Open Society senior leadership initiating efforts to streamline the work of the Foundations to align with the direction of other philanthropic organizations and nonprofits.<sup>34</sup>

## II.B. Overview of Partnerships

Since the beginning, individual grantmaking at the Foundations was situated within a network of partnerships.<sup>35</sup> As noted in the *Scholarship Programs Coordinators Manual* (2011), the Scholarship Programs had “cost-sharing relationships with universities, private donors, and government programs and agencies from England, France, Germany, Denmark, the Netherlands, Canada, and the United States.” These partnerships were primarily managed by Scholarship Programs staff in New York City and London. Additionally, different organizations also provided staff support, e.g., national scholarship coordinators or points of contact within Open Society Foundations’ local/national foundations as well as national education advising centers. In addition to funding partners, the Scholarship Programs also had government partners, which were enacted through various Memoranda of Understanding.

Finally, although this evaluation report focuses on the Foundations’ engagement in the scholarship space, i.e., regarding individual grantmaking, there was a great deal of investment in various higher education institutions as well. Higher education institutions that received support from the Open Society Foundations included: the American University of Bulgaria (Bulgaria), the American University of Central Asia (Kyrgyz Republic), Central European University (Hungary and Austria), the Graduate School for Social Research (Poland), and the Riga Graduate School of Law (Latvia).<sup>36</sup>

There were a variety of different ways partnerships were established. Because Soros had been working with Oxford and Cambridge Universities to facilitate the scholarships that he had directly funded since 1979, those connections were then transferred to the Scholarship Programs. Other partnerships were formed because of different network encounters via various Open Society representatives (George Soros, Global Board members, and/or Scholarship Programs staff). Other partnership opportunities emerged as the Open Society Scholarship Programs became more established and had a demonstrated history of being able to administer scholarship programming. Finally, other partnerships were with the national foundations and local activist networks that were able to petition for scholarship programming for particular areas.<sup>37</sup> These national foundations and local networks created an extremely decentralized organizational structure. As noted by Open Society Foundations Senior Vice President Leonard Benardo, “[t]he guiding ethos of the foundations is different from most [philanthropic] entities in which funding decisions are made in the center... [t]hat’s why we have a surfeit of boards.”<sup>38</sup>

# III. THE SCHOLARSHIP PROGRAMS' THEORY OF CHANGE

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Although the Scholarship Programs never explicitly articulated a theory of change regarding scholarships, its materials collected for this evaluation (e.g., documents, websites, and various issues of *ScholarForum*), as well as Soros's own essays and interviews, delineates its guiding framework. This theory of change consisted of four main components—access to educational experiences, the transformative power of ideas, bringing those ideas and experiences to their home communities, and the building up of civil society.

One assumption that underpinned what the evaluation team is calling the Scholarship Programs' theory of change is the notion of *concentrated diffusion*. *Concentrated* in that people from the same country—albeit not necessarily the same ethnolinguistic, religious, or other identity affinity groups—could potentially share a set of values and a vision of what civil society could look like in a specific place. This was exemplified by the Scholarship Programs' primary sustained focus on geopolitical “units” (i.e., the nation-state) and regions over time.<sup>39</sup> *Diffusion* in that the focus of the scholarship awards ranged across numerous disciplines and sectors but within the broader realm of social sciences and humanities.

The main exemplars of this concentrated diffusion effect in the work of the Scholarship Programs were the scholarship recipients themselves. As Aryeh Neier, Open Society president emeritus, noted:

[t]he purpose of the Open Society Foundations is to promote the development of more open societies. We have two principal ways of doing this. One is to develop institutions. The other is to try to enhance the knowledge, awareness, skills and values of individuals so as to promote their commitments to open societies and their capacity to contribute to open societies. Scholarships play a crucial role in the second of these ways of advancing our goals.<sup>40</sup>

As noted in Section I.B, Soros's view of the open society clearly imbued and informed the guidelines and scholarship selection criteria for the Scholarship Programs. As one example, the application packet for the Global Supplementary Grant Program (AY2000–01), stated:

An Open Society is a society based on the recognition that nobody has a monopoly on the truth, that different people have different views and interests, and that there is a need for institutions to protect the rights of all people to allow them to live together in peace. The term “open society” was popularized by the philosopher Karl Popper in his 1945 book *Open Society and Its Enemies*. Broadly speaking, an open society is

characterized by a reliance on the rule of law, the existence of a democratically elected government, a diverse and vigorous civil society, and a respect for minorities and minority opinions.

Another way to map the Scholarship Programs' theory of change is through the evolving mission statement included at the start of each *ScholarForum* publication printed between 1999 and 2016. The first paragraph of this mission, as shared below, remained consistent across the 17 years of publication, with changes being added across time, based on the countries served, naming within the organization, and specific focus of the programs' work. The opening mission statement reads as follows:

Fund the participation of students, scholars, and professionals from Eastern Europe, the former Soviet Union, Mongolia, the Middle East, South Asia and Southeast Asia in rigorous, competitive academic programs outside of their home countries. The goals of these programs are to: revitalize and reform the teaching of the social sciences and humanities at higher education institutions; to provide professional training in fields unavailable or underrepresented at institutions in the countries served; and to assist outstanding students from a range of backgrounds to pursue their studies in alternative academic and cultural environments.<sup>41</sup>

Variations of the mission statement include the text above, along with the following additions, including the name change from Open Society Institute to Open Society Foundations:

The Open Society Institute (OSI) is a private operating and grantmaking foundation that develops and implements a range of programs in civil society, education, media, public health, and human and women's rights, as well as social, legal and economic reform. OSI is at the center of an informal network of foundations and organizations active in more than 50 countries worldwide that supports a range of programs. Established in 1993 by investor and philanthropist George Soros, OSI is based in New York City and operates network-wide programs, grantmaking activities in the United States and other international initiatives. OSI provides support and assistance to Soros Foundations in Central and Eastern Europe, the former Society Union, Guatemala, Haiti, Mongolia, South, Southern and Western Africa.<sup>42</sup>

Active in more than 70 countries, the Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.<sup>43</sup>

The Open Society Foundations' work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 100 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.<sup>44</sup>

A review of 16 *ScholarForum* publications between 1999–2016 demonstrated the ways that the core issues identified by the Scholarship Programs in the late 1990s traversed the first decade and a half of the 2000s and remain relevant today.<sup>45</sup>

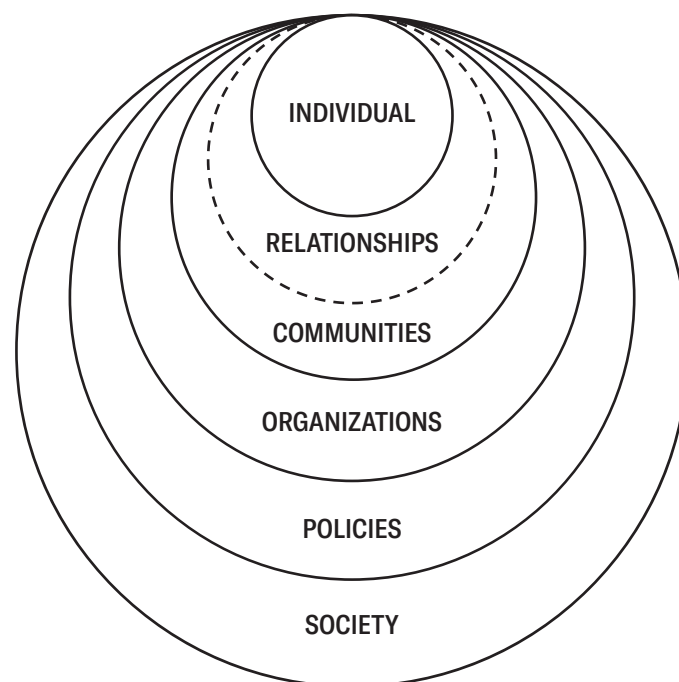
# IV. EVALUATION FRAMEWORK

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The framework utilized in this evaluation is based in Urie Broffebrenners's (1977, 2001) *ecological model of human development* (EMHD).<sup>46</sup> As noted by Tudge et al. (2016), the EMHD “incorporates a four-element model, involving synergistic interconnections among proximal processes, person characteristics, context and time” (p. 428). The ecological environment is typically depicted as nested in nature with three systems being illustrated: the microsystem, mesosystem, and macrosystem.<sup>47</sup> This framework is often used in educational evaluations to better understand whether access to educational experiences do, in fact, have an influence on the participants. Mawer (2018) used three of the systems (micro, meso, and macro) as a framing for evaluating international scholarships.<sup>48</sup> He writes that the micro encompasses “individual outcomes for scholarship recipients, meso-organizational and institutional effects, and macro-societal impacts.”<sup>49</sup> It is through an analysis of these three systems that Mawer claimed international scholarship recipients do experience “personal development and professional success” through their respective programs.<sup>50</sup>

The visualization of this framework which the University of Wisconsin–Madison evaluation team utilized is drawn from the work of the University of Minnesota's Center for Leadership Education. This framework recognizes that “individuals affect and are affected by a complex range of social influences and nested environmental interactions.”<sup>51</sup>

**Figure 2.** A socio-ecological model for philanthropic scholarship funding





The first adaptation takes into consideration the dynamic relationship between individuals and the broader ecosystems they are situated in and how those contexts themselves are constantly changing. The second adaptation was regarding the order of communities and organizations. In the context of the Open Society scholarship recipients, because communities seemed to be more of an extension of relationships, communities became adjacent to relationships and were separated by a dotted line.

The idea of individuals both affecting and being affected through social systems aligns with George Soros's (2009) *theory of reflexivity*. Soros' theory of reflexivity calls on both cognitive functions and practicality, or manipulative, functions as valued components to making change at an individual level. Through educational experiences (i.e., what Soros calls *lived realities*) one enters what he terms *feedback loops*. It is through the *negative feedback loop*, where one is confronted by unknown things that raise questions, where growth and learning take place.

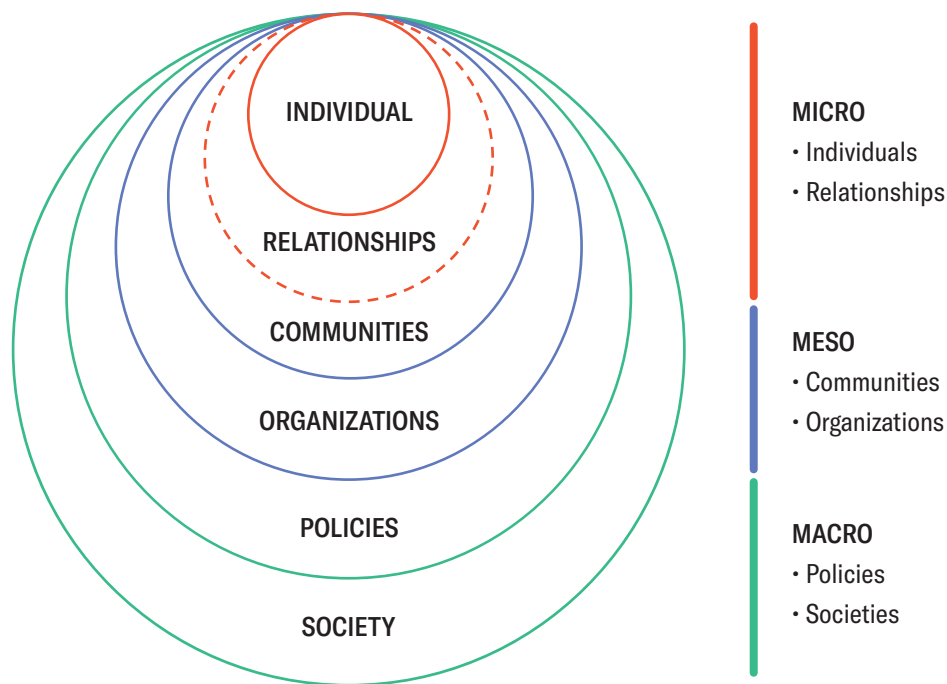
To articulate the adapted socio-ecological model in a different way, the Scholarship Programs' work assumed:

- The awardee came into the program with a particular set of knowledge, skills, values, and perspectives based on their life experiences.
- They were then enrolled in an academic program and were introduced to new ideas and perspectives.
- This educational experience—along with the broader lived professional and personal experiences—offered space and time for learning and reflection that awardees then were able to translate within their home country contexts and all the other locales within which they lived and worked.
- The discipline-specific knowledge they gained through the scholarships were then put into practice at a societal level across the countries in which Scholarship Programs worked, and across the various social science and humanities fields and contributed to civil society building at large.

In this evaluation, the adapted socio-ecological model is situated within the Scholarship Programs' theory of change by creating arenas of influence regarding the impact of their scholarship on awardees within three levels—the micro (individual and relationships), meso (communities and organizations), and macro (policies and society) (Figure 3).

This model was used to gain a better understanding of the evaluation questions and, more specifically, an understanding of awardees' sense of the impact of access to educational experiences on their personal lives and well-being, as well as the ripple effects into their relationships, communities, and into the meso- and macro-levels.

**Figure 3.** The socio-ecological model embedded in different levels of impact



Situating the awardees within this type of socio-ecological model allowed the evaluation team to consider issues of access and impact from a nested perspective. This also allowed the evaluation team to explore what the impact of the scholarship was over time (Figure 3). In lieu of available consistent data from monitoring and evaluation over time, this model then provides a tool to help explore some sense of change over time and broader impact (at least from survey and focus group respondents).

We return to the model in Figure 3 in Section VI to help organize themes that emerged from the awardees' experiences pre-, during, and post-award.

# V. METHODOLOGY

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The EQs were formulated in response to the Scholarship Programs' request for proposals, which was circulated in August and September 2021 and developed by Martha Loerke and other people from the team. This section provides an overview of the data collection methods that were used in this evaluation.

**EQ1**—How did the Scholarship Programs facilitate greater access to education for its 20,000 awardees?

**EQ2**—How did the Scholarship Programs inform higher education institutions' notions of “access” and how was that institutionalized (if any)?

**EQ3**—What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility? Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?

## V.A. Background

The evaluation team's work was informed by principles from culturally responsive evaluation.<sup>52</sup> It was critical to understand and describe the context (both geopolitically and locally) of the work of the Scholarship Programs. In aiming to understand both the unit's organizational context, as well as the awardees' broader socio-cultural-political contexts, the evaluation team scheduled a number of meetings with Open Society staff between September 2021 and February 2023 (both virtually and in-person). From September 2021 through July 2022, the evaluation team and the Reassigned Grants Unit teams' meetings focused on better understanding the evaluation's objectives, goals, and design. From August through December 2022, the two teams met to focus on different issues that were being raised regarding the safety and security of awardees who would receive the survey and focus group invitations. These meetings were instrumental in informing the evaluation design choices and adjustments that were made and were critical to making sure that the evaluation remained aligned with the Foundations' evaluation goals and objectives.

## V.B. Methodologies

The evaluation was designed to capture an understanding of the evaluation questions and the work of the Scholarship Programs more broadly. To better understand the EQs through the lens of academic discipline and sector, the evaluation team, in discussion with Open Society representatives, decided to also focus more closely on four specific areas. This included: social work/social policy, education, law/human rights (which included the Palestinian Rule of Law and Disability Rights scholarships), and global/public health. The criteria for selecting these four areas were: (1) Scholarship Programs had been involved in these areas for a sustained amount of time; and (2) there were large(r) cohorts of students who studied in these programs, both at certain institutions and in home countries. This then became the criteria for the focus group and interviews. The key stakeholders for the focus groups, interviews, and surveys were delimited to scholarship awardees and host university representatives.<sup>53</sup>

To better explore these questions, three primary data collection methods were used to explore the EQs—document analysis, surveys, and interview/focus groups.

### V.B.1. Document analysis

The intention of the document analysis was to better understand the scale and scope of the Scholarship Programs from its early years until its sunsetting for all three EQs. The documents were collected in two main phases. Phase one was the digital document collection between October 2021 and May 2022. Various digitized documents were collected from the Scholarship Programs and Reassigned Grants Unit staff. Phase two of the documents took place between July and September 2022. In July, the evaluation team reviewed various paper artifacts at the Open Society offices in New York City. During that time, the team digitized a total of 977 documents that were later divided into eight categories—data collection, needs assessments and evaluations, surveys, internal notes, events/initiatives, finances, partnerships, and scholarship administration. In addition to the digitized (or digital) documents, the evaluation team also reviewed 16 editions of the *ScholarForum* magazine which was published to highlight the accomplishments and experiences of awardees. NB: The observations from the document analysis have been integrated throughout the report.

## V.B.2. Surveys

Two surveys were developed to understand the EQs through the perspective of key stakeholders.

### V.B.2.a. Survey: host institutions

The host institution survey was focused on better understanding EQ2 through the perspective of the host universities where Open Society scholarship awardees had attended.<sup>54</sup> The survey consisted of 25 core questions broadly focusing on host institution information (15), university experience (10) and one final open-ended question to allow respondents to provide any feedback not captured in the survey. Additionally, there were three questions that were intended to identify institutions that had hosted students in the four aforementioned priority areas and were interested in participating in a follow-up one-on-one interview. The survey was open between November 22 and December 8, 2022. Of the 107 invitees, 25 completed the survey on/before the December 8, 2022, deadline (24 percent response rate).

Among those who completed the survey, seven respondents indicated they would be willing to participate in a follow-up interview. The majority of respondents were host universities for CSLA awardees (76 percent) studying in master's degree programs between AY2014–15 and AY2020–21.

Geographically, the respondents' institutions were in Europe (n=17) and the United States (n=8) and were predominantly public (76 percent) and comprehensive research and teaching institutions (76 percent). Many respondents indicated their higher education institutions only hosted one Open Society Foundations scholarship program (84 percent).

Relatedly, by the respondents' estimates, most host institutions had hosted fewer than 50 scholarship recipients (76 percent). Although this may indicate the respondents were from higher education institutions that were newer partners, 32 percent indicated their institutions had been host universities for 6–10 years and another 32 percent indicated they had been a host institution for 11–16 years.

In terms of language of instruction, among the respondents, all of the institutions except for one offered post-graduate instruction in English with seven higher education institutions indicating they also offered instruction in other languages (i.e., French or German). One institution solely provided instruction in French.

In terms of sampling, a convenience sampling method was used. Because the Scholarship Programs team had engaged with different higher education institutions over the course of 30 years, there was significant staff turnover within the universities themselves. And because the focus of the scholarship awards had also changed over time, the institutions that the Open Society Foundations had partnered with changed over time. For these reasons, the evaluation team decided that a convenience sample would be both expeditious and provide insight into EQ2. To ascertain who the survey invitation could be sent to, ahead of the survey invitations being issued, the Reassigned Grants Unit staff sent out an email to the potential email recipients informing them that the Open Society Foundations were conducting a summative evaluation on the work of the Scholarship Programs and that they

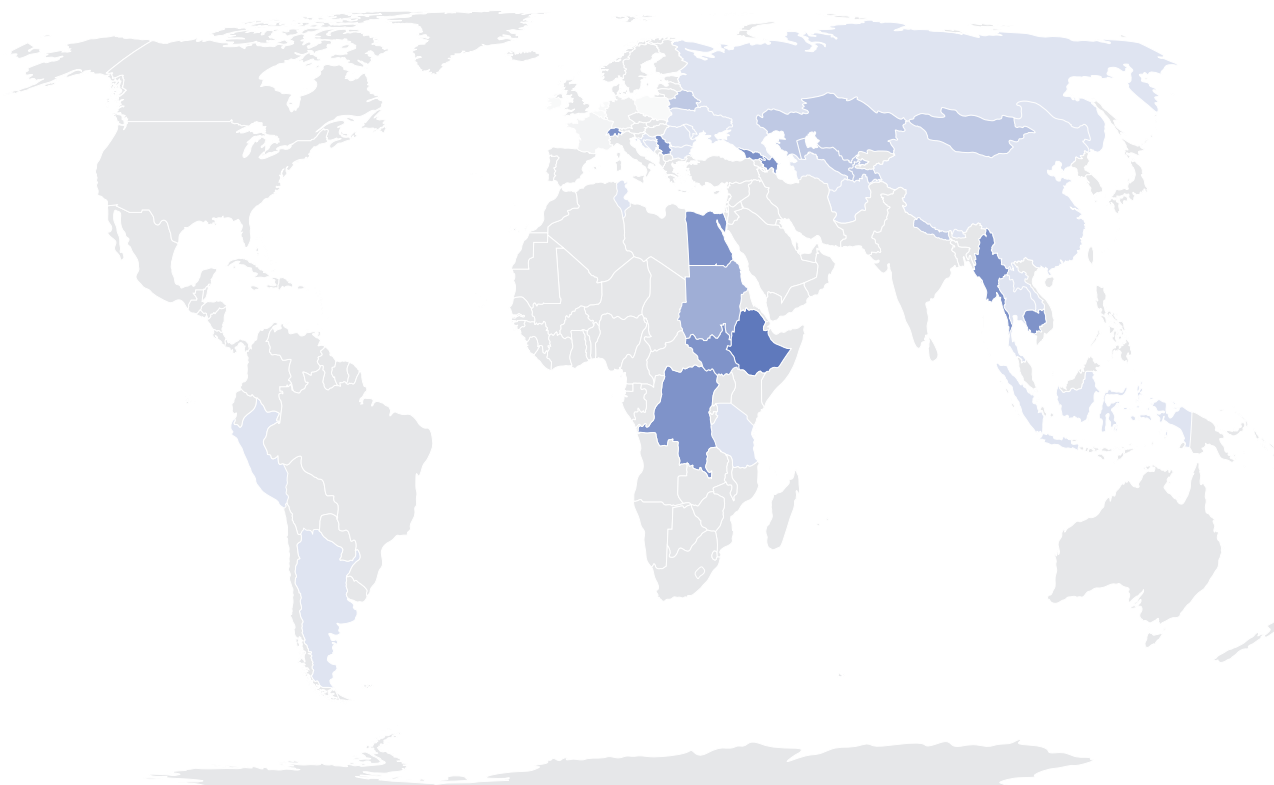
were going to receive an email from the evaluation team regarding their experience as a host institution. This enabled the Reassigned Grants Unit staff to revise the email list by removing bounce backs or other types of notifications. In total then, the Reassigned Grants Unit staff provided a list of 107 partner institution representations from continental Europe, the United Kingdom, Ireland, and the United States. The first round of survey invitations was issued by the evaluation team on November 22, 2022, with a second round issued on November 30, 2022.

### V.B.2.b. Survey: awardees

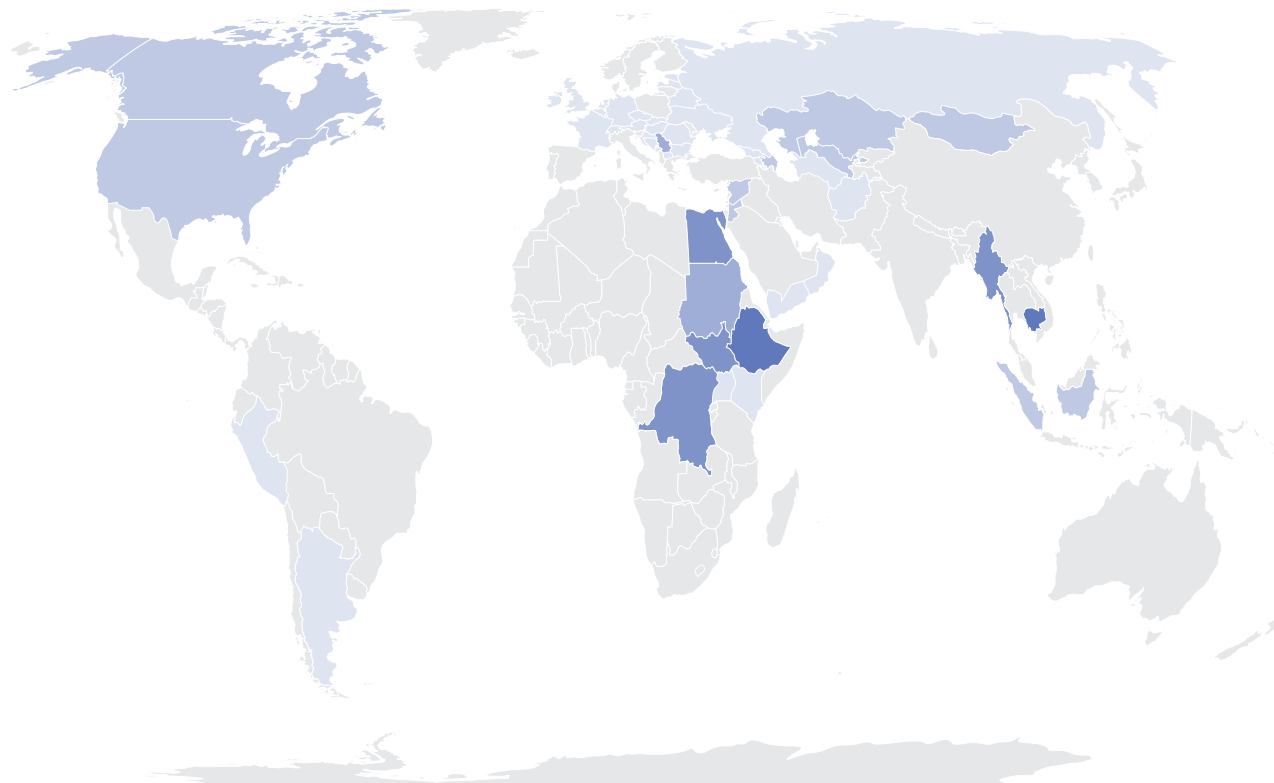
The second survey primarily focused on EQ1 and involved better understanding the awardees' perspectives and lived experiences. The survey consisted of 44 core questions focusing on five different areas—award and socio-demographic information (21); university and community experience (4); post-scholarship experience/general (5); professional life, economics and networks (8); changing perspectives (6); and one final open-ended question to allow respondents to provide any feedback not captured in the survey. A series of questions utilized retrospective evaluation questions. Retrospective questions are often used when pre- and post-data is not available. Retrospective questions ask participants to reflect their viewpoints prior to the intervention, which in this case was the scholarship-funded educational experience, and after their program.<sup>55</sup>

Figures 4–6 provide an overview of the survey respondents' country of citizenship at the time of the award, current country of citizenship, as well as current country of residence. A convenience sampling method was used in the awardee survey. The degree of blue indicates the number of respondents, i.e., the darker the blue, the more respondents).

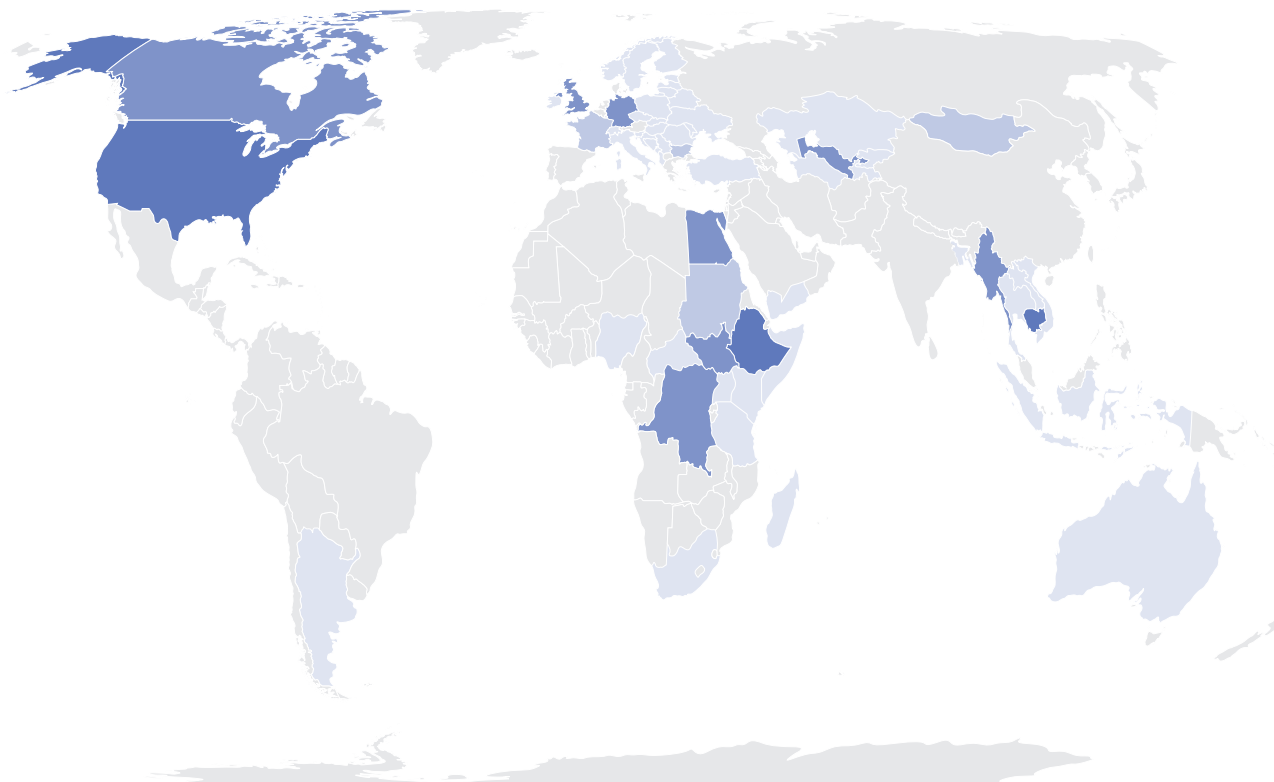
**Figure 4.** Awardee country of citizenship at time of award (n=612)



**Figure 5.** Awardee current country of citizenship (n=595)



**Figure 6.** Awardee current country of residence (n=480)



Additionally, there were three questions that were intended to identify awardees who had studied in the four priority areas and were interested in participating in follow-up focus group interviews.<sup>56</sup> Of the 4,563 invitees, 626 completed the survey on or before the January 8, 2023, deadline. Of those who completed the survey, 207 respondents indicated they would be willing to participate in a follow-up interview. Prior to sending out the survey link, the Reassigned Grants Unit sent out an initial email informing recipients that (1) the Open Society Foundations was conducting an evaluation on the Scholarship Programs; (2) they would receive an email from an external evaluation team with a survey link; and (3) they could opt out of any future communication from the Foundations in accordance with the EU General Data Protection Regulations. This enabled the Reassigned Grants Unit to revise the email list by removing bounce backs or other types of notifications. In total, from an initial email list of 5,641 people, a final total of 4,563 awardees received an invitation to participate in the awardee survey. The survey was open from December 17, 2022, through January 8, 2023.

### **V.B.3. Interviews and focus groups**

To better understand the evaluation questions through the perspective of key stakeholders, university and funding partners, along with Scholarship Programs alumni, were invited to take part in interviews or focus groups. Participants were invited to take part in an interview or focus group through the surveys that they completed. University and funding partners received an invitation to do the interview, and alumni were invited to do the focus groups.<sup>57</sup> At the time of the interviews and focus groups, participants were given the option to choose a pseudonym. If they did not choose a pseudonym, they were assigned a letter such as “Alumni A.” In the transcription of the focus groups or interviews, the respondents were then assigned the date of focus group/interview to differentiate who shared what across different days.<sup>58</sup>

#### **V.B.3.a. Interviews: host institutions**

The interviews with host university representatives (n=9) and focus groups with alumni were carried out in the last week of January through the end of February 2023. Both were conducted through Zoom, unless otherwise requested by a respondent. Nine institutional partners participated in the interviews with five being from Europe and four respondents from North America. Diana Chioma Famakinwa, PhD, served as a consultant on the evaluation and conducted the nine interviews. The interviews lasted approximately 25 minutes. The interview questions sought to provide additional information on the relationship between the Open Society Foundations and the institution, and the ways that hosting Open Society Foundations’ scholarship awardees contributed to internationalization at the host universities.



The respondents were both campus administrators and faculty affiliated with the programs. In total, there were 11 open-ended questions for participants. Table 2 provides a synopsis of the length of time the nine institutions partnered with the Open Society Foundations on their scholarship programs. The European partners had longer standing relationships with the Foundations than the North American partners.

**Table 2.** Duration of partnership between higher education institutions and the Scholarship Programs

| <b>Length of Partnership</b> | <b>Number of Institutions</b> |
|------------------------------|-------------------------------|
| <b>0–9 years</b>             | 2                             |
| <b>10–19 years</b>           | 4                             |
| <b>20–29 years</b>           | 1                             |
| <b>30+ years</b>             | 2                             |

The open-ended survey question responses, as well as the one-on-one interview transcripts and notes, were exported into NVIVO (v. 12) and then coded utilizing an iterative coding process (Saldaña, 2009). The four primary codes included: expanding the university’s footprint globally; diversity; institutional impact; and critiques. Within these codes, diversity was further delineated into “diversity of countries” (often referring to international students’ home of origin) and institutional impact was further delineated into “diversity of perspectives” and “qualitative improvement” (which often had to do with how the university as a whole was a “better place”).

### **V.B.3.b. Focus groups: awardees**

Due to time constraints and the number of survey respondents who indicated their interest in participating in a focus group, a different participant selection approach was used for awardees.

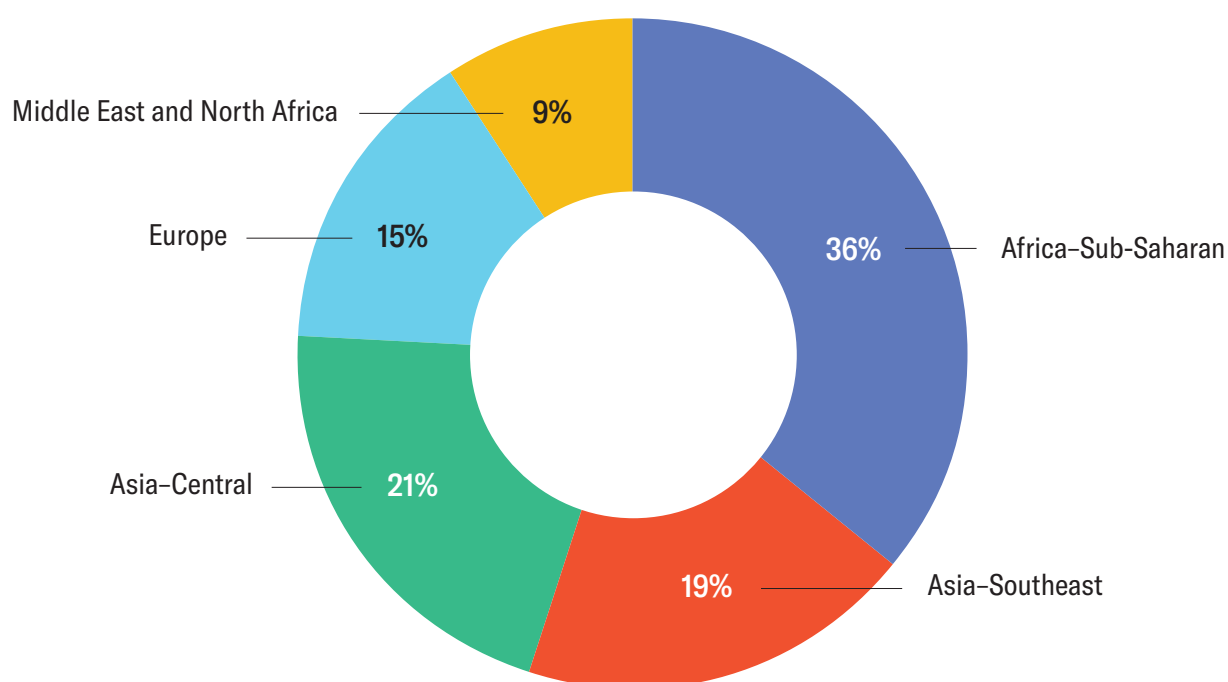
Among all of the survey respondents who indicated they were interested in participating in a focus group and had shared relevant contact information (n=207), they were then further divided into groups: education (n=55); global/public health (n=32); law/human rights (n=57); and social work/policy (n=62).

The focus groups (n=48) were conducted in two rounds between January and February of 2023. The first round was divided into general time zones and disciplines, e.g., education Greenwich Mean Time (GMT) 0–5, GMT -6–10, and GMT +4–11. This approach was designed so that participants from different regions would be able to participate during reasonable hours, allowing for a greater diversity of participants. Potential participants

who had studied specific disciplines and were in one of the designated time zones were invited to then sign up.

However, although the maximum number of people had signed up for the focus groups, the actual focus group turnout was generally low. The second round of focus group interviews were then scheduled at different times but without the discipline criteria. These focus groups overall had a more robust turnout. In total, 48 scholarship alumni participated in focus groups, with a few opting to do interviews, during the month of February 2023 (Figure 7).

**Figure 7.** Focus group participants by country at the time of award



In addition to the general call for interview participation, potential participants in politically unsafe environments were provided one-on-one opportunities to be interviewed. The focus group participants were self-selected out of a group of 208 who indicated interest in participating in the sessions. There were 10 respondents each for education and health, and nine each for human rights, law, and social work. Forty-four of the alumni completed master's degree programs, with three alumni carrying out research during their fellowship. Of the respondents, 36 percent came from sub-Saharan Africa, 19 percent from Southeast Asia, 21 percent from Central Asia, 15 percent from Europe, and 9 percent from the Middle East and North Africa. Table 3 provides an overview of the countries where focus group participants studied. As seen in Table 3, the majority of the respondents spent time in the United Kingdom and the United States.

**Table 3.** Focus group participants by country of host university

| <b>Host University Location</b>                | <b>Number of Focus Group Participants</b> |
|--|---|
| <b>France, Germany, Ireland</b>                | 9   |
| <b>Hong Kong, India, Philippines, Thailand</b> | 7   |
| <b>United Kingdom</b>                          | 16  |
| <b>United States</b>                           | 16  |

Finally, similar to host institution data, the open-ended awardee survey question responses, as well as the focus group and interview transcripts and notes, were exported into NVIVO (v. 12) and then coded utilizing an iterative coding process.<sup>59</sup>

#### **V.B.4. Evaluation limitations**

Due to different administrative delays, work on the evaluation was largely carried out between July 2022 (document collection) and between December 2022 and April 2023 (survey, focus group, and interviews). Despite the short time frame, particularly regarding the survey and focus group/interviews, there were sufficient response and participation rates. However, some limitations should be noted in this section. For example, regarding the data collection instruments, the survey tool was not piloted prior to respondent recruitment. The survey was reviewed by Scholarship Programs staff but not the awardees. Due to the lack of alumni input, a question regarding the types of institutions alumni worked for pre- and post-award included a high rate (n=102) of responses in the “other” category. A series of questions pertaining to what enriched awardees’ time during the program had a high non-response rate. That set of questions would have benefited from an initial pilot test of the survey instrument prior to its actual distribution.

##### **V.B.4.a. Participant information limitations**

The evaluation team relied on the Reassigned Grants Unit to provide them with a contact list to send out the different surveys. The survey responses were then used to identify those respondents who would also be willing to provide an interview or participate in a focus group. In the case of the institutional contacts, as mentioned earlier, the evaluation team was given a list of 107 potential respondents from the Reassigned Grants Unit with the main criteria being that these were email contacts in their data management system that had not bounced back. In the case of the awardee contact information, i.e., depersonalized email addresses, there were a number of limitations to the creation and sharing of the list including (but not limited to): internal changes in data tracking technologies (paper and digital documents, online databases, and file sharing

platforms); Scholarship Programs staff turnover over time; the Open Society legal team's concern regarding awardee data protection in relation to the EU General Data Protection Regulation; external awardee mobility; digital accessibility; and updating digital contact information. Ultimately, to conduct the surveys, the evaluation team created another version of the awardee survey with all references to the Open Society Foundations Scholarship Programs removed. This survey was then sent through a Scholarship Programs affiliated email account.

#### **V.B.4.b. Participant limitations**

In addition to the organizational aspects which contributed to the participant information limitation during the data collection process, there were issues of access that may have prevented some respondents from participating. There were a number of respondents who started the survey or emailed to indicate they wanted to complete it after the survey data collection period had closed. Additionally, there were several people who indicated that they wanted to participate in the focus group and signed up; however, they were unable to participate because they could not sign the consent form related to data protection and confidentiality.

# VI. FINDINGS

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The findings section will be broken down by question and then by source of the findings. As noted previously, the evaluation team reviewed approximately 943 artifacts, reached out to 107 higher education professionals who represented different Scholarship Programs partner organizations/institutions, with 25 completing the survey and nine people participating in an interview. For the awardee survey, 5,641 invites were sent out, of which 4,563 were viable email addresses. Among these potential respondents, 628 submitted the survey and 48 people participated a focus group/interview. The focus group/interviewees were alumni of education, health, human rights/law, or social work programs.

## VI.A. Access and Awardees

As mentioned earlier, Lewis (2015) argued that “[a]ccess is more than physical access to higher education opportunities. Examinations of access should include examinations of quality, gains in knowledge and skills, an accessible curriculum, the opportunities that the educational experience then proffered, and equity to education with a focus on access of historically marginalized groups.” (pp. 37–38)

The Scholarship Programs provided pathways to degrees and research experiences at top universities around the globe for talented individuals whose own economic resources prevented further educational attainment at a university outside of their home country. The research funding also made it possible for graduate students, junior faculty, and tenured faculty to have access to opportunities to deepen their knowledge and work within the social sciences and humanities.

### EQ1—How did the Scholarship Programs facilitate greater access to education for its 20,000 awardees?

This section includes an introduction grounded in the document analysis, followed by an analysis of the survey, focus group sessions, and interviews that the team obtained. A major contribution to access was the way that Scholarship Programs partnered with other agencies and programs to fund its scholarship portfolio. The Scholarship Programs sought to balance their own investments in different country contexts and thematic areas, while also considering how to build on the philanthropic efforts of other foundations and government agencies working in higher education scholarships around the globe.<sup>60</sup> Finally, this evaluation sought to better understand what enriched the awardees’ experiences at their host universities, which in turn made their university experiences more accessible.

## VI.A.1. Cultivating pre-program access

To convey the intricacies of issues navigated by the Scholarship Programs' team in order to provide financial and academic access to awardees, the evaluation team selected an excerpt from a report on the Regional Scholarship Programs for the Open Society Global Board from June 6, 1997. The report illustrates a number of topics and issues that the Scholarship Programs managed on a regular basis.

In terms of cost sharing and outreach, the memo began by outlining the financial investment that the Open Society Foundations made toward Regional Scholarship Programs. At the time, the Regional Scholarship Programs had 14 scholarship programs, with eight of those programs being co-funded with full or partial tuition waivers. The memo identified the intricacies of negotiating and navigating the co-funding and cost-sharing arrangements that allowed the Foundations to offer last dollar in funding, which in turn enabled them to stretch their financial commitments further.<sup>61</sup> The memo then described a new idea for funding scholars which would allow junior faculty to spend one semester a year for three years at a "Western" university. This program would require the junior faculty member to return to their home country during the second semester of each year to test new curricula and teaching methods.

The memo then outlined an expansion of funding between the French Ministry of Foreign Affairs and the Open Society office in Budapest. The Budapest office's outreach was in support of recruitment efforts in Albania, Bulgaria, Georgia, Moldova, and Romania. The memo ends with an overview of priorities for 1997, which included the Undergraduate Exchange Program and the American University in Bulgaria scholarships, as well as a disciplinary expansion into public health and urban studies. This memo exemplified the many moving parts that went into ensuring access for a broad number of awardees, from a diverse set of countries who were intellectually and professionally engaged in a broad array of disciplines, and who had a demonstrated commitment to civil society and social change.

Moving away from the memo and beyond financial barriers the Scholarship Programs was also mindful of the other barriers that limited access to elite higher education institutions for students from underrepresented countries/regions, including language. Language barriers included language and knowledge of other academic systems which included things such as application and acceptance processes, airfare and booking flights, and setting up payments. The Scholarship Programs also provided language courses and financial aid for language tests.

The other big intervention that the Scholarship Programs initiated was the Summer School program. Campbell and Basi (2022) provided an overview for how the Summer School program contributed to the scholarship awardees' experiences.<sup>62</sup> Summer School began in 2003, was held over the course of one month, and was hosted in various cities over its history. Typical enrollment for the Summer School program was between 50–120 participants with 15–25 instructors.<sup>63</sup> The program aided educational access in a few ways. First, the program focused on topics of relevance to higher education success at top universities around the globe including “scholarly writing, research, critical thinking, and other academic skills.”<sup>64</sup> It also focused on particular types of writing (e.g., legal writing) and language (e.g., English, French, German, etc.). Campbell and Basi (2022) found that of their 12 interviewees, all reported that the Summer School program helped prepare them for their master's programs. They also shared that the Summer School program helped prepare them for how “Western lecturers viewed dissenting opinions as critical thought and advancing learning in the classroom.”<sup>65</sup> Other useful topics offered through the Summer School program included: guidance on asking questions, leading class discussions, and facilitating peer-to-peer learning (p. 25). Campbell and Basi state that the Summer School program was “... viewed as an extension of the Open Society Foundations' goal to expand educational access to promising civil society leaders.”<sup>66</sup>

The Summer School program was also mentioned by focus group attendees and in open-ended survey questions for this evaluation. It was seen as having been useful to their acclimation to the program and getting set up for success at their respective host universities. For example, an awardee from Jordan who studied in the United States said:

*[What] I found really helpful was summer school, and how the summer school was for every participant. It wasn't just for the people going to [my host university] or going to the U.S. I met a lot of people and made some really good friends—who, even though they were not in New York, genuinely did provide a sense of support, and, like they were my sounding board. If I needed to talk something through or anything.* (Alumni B.2.17, focus group, February 17, 2023)

For example, many respondents cited meeting their Open Society program manager or a Summer School instructor as two types of supporters they had during their programs. Others noted that the Summer School program allowed them to build friendships. One awardee from Tajikistan who studied in the United States wrote, “While I was in summer school in Tbilisi, I met some [Open Society Foundations] friends there and we together came to study at [university] which I value most.” When asked to name their three greatest supporters, one awardee from South Sudan who studied in the United Kingdom said it was their program manager who “supported us since the interviews and summer program, till we got to the university.” Finally, an awardee from Egypt who studied in Austria recalled:

*...The first summer school which was longer and more intense was really useful. The professor [name of a summer school instructor] provided engaging and provoking discussions and interesting readings. Had it been held in person instead of online, it would've been even more engaging and useful.*

Finally, regarding fostering pre-program access, the Scholarship Programs had historically engaged and utilized numerous activities to maximize the scholarship opportunity within different country contexts. For example, in an annual report on its earlier activities in Belarus, the Scholarship Programs (2004) outlined the numerous ways in which it circulated information about the scholarship which included: advertisements in newspaper/radio; presentations at universities; notices at universities, libraries, and Education Advising Centers; e-mail information sent via list-serves which were sent to both individuals and organizations; website information; professional bodies; international organizations; close cooperation with other education-related organizations; international offices at universities; the local offices of the British Council, American Councils, German Academic Exchange Services, and the Centre National des Oeuvres Universitaires et Scolaires; the Academic Fellowship Program; and Scholarship Programs alumni. Underlying this multi-faceted information campaign was the commitment to trying to “reach well-qualified applicants throughout the country and not just in the capital city.”<sup>67</sup> Having an extensive outreach campaign was one way of prioritizing “access to access,” so to speak, as well as demonstrating how the availability of external partners worked together to facilitate the work of the Scholarship Programs.

## VI.A.2. Enrichment

The Scholarship Programs’ alumni had overwhelming positive things to say about their host university experiences. But how did that experience translate into issues of greater access? The alumni survey asked a series of questions about what aspects of their time in the program were enriching for them. When considering access, this set of questions identified what enriched the awardees’ time at university and wove together the ways that the scholarship experience facilitated greater access to education and research.

There were several factors that enriched the awardees’ experiences. The top four enriching factors included: courses/classes (72.3 percent), financial support (71.77 percent), friends (70.82 percent), and academic mentoring (69.97 percent). Other enriching factors with > 50 percent valid responses included:

- Academic advising (67.49 percent)
- A cohort at host university (61.93 percent)
- Host university ongoing logistical support (61.17 percent)
- Host university administrative support (59.84 percent)
- Open Society advising support (57.41 percent)
- Open Society cohort mates (54.82 percent)
- Open Society Summer school (53.33 percent)
- Family (50.32 percent)

The survey findings are further substantiated in the rest of this section with the findings from the focus groups and interviews, and open-ended survey items.



### VI.A.3. Educational offerings: courses and classes

Respondents identified courses and classes as the most enriching part of their scholarship experience. This finding was bolstered by the experiences shared by focus group participants and the open-ended survey responses. Focus group respondents spoke to the spectrum of learning that took place both inside and outside of the classroom during their time at university. From an introduction to new concepts for some, to the deepening of theoretical knowledge for others, access to courses and classes enriched the awardees' understanding of their content areas and other topics of relevance to the program such as democracy, civil society, human rights, LGBTQ+ rights, disability rights, and gender rights.

This spectrum of learning is seen in the remarks of focus group participants. An awardee who was from Turkmenistan and studied in the United States shared that they read the Universal Declaration of Human Rights for the first time in one of their classes. They said:

*I actually didn't know the term civil society. I was like, 'Ok, this is [what] civil society [is].' I had no idea that that's the name for it. I always knew what democracy is about and it truly expanded as part of my studies. Because this time around, instead of seeing it as an idealistic system, I also understood the flaws. So that's how it shifted—it was a good thing.* (Alumni C.2.20, focus group, February 20, 2023)

For Alumni C.2.20, their coursework provided access to knowledge on human rights that they previously had not been exposed to and also fostered critical thinking on democracy. An awardee from Egypt who studied in the United States said that the content they learned in their classes was impactful to their knowledge and awareness of different issues. They noted:

*I cannot emphasize enough how impactful the program was for me personally. The access to knowledge, access to connections that allowed me to have this awareness. It has helped me to make strides and make, like, big leaps in the work that I did, and I'm still doing back in my home country and with my community. I cannot imagine doing such work without this knowledge and awareness that I was equipped with because of the Open Society Foundations.* (Alumni B.2.2, focus group, February 2, 2023)

An awardee from Georgia who studied in the United States addressed how it was a combination of coursework and living in the United States that heightened their awareness of disability rights. They said:

*When I first arrived, I was very surprised to see so many disabled people in wheelchairs—on the buses or public transport or in my classes. I thought, "There are so many disabled people." And then I realized that we [in Georgia] had as many, probably, but they are not visible because there are no opportunities for them.* (Alumni B.2.3, focus group, February 2, 2023)

Awardees who responded to the question regarding their general campus experience(s) noted how the coursework and classes stood out for them:

*As a student, I enjoyed my stay due to the fact that the courses were very interesting; the students were drawn from over 34 countries—very diverse and open minded.* (Awardee from Ethiopia who studied in Germany, survey)

*Grad school was a boost for my knowledge and professional career. At the beginning, I had some difficulties with academic English and the environment, self-discipline and management. Also, close to the middle of my studies, I realized what courses and classes were more interesting for me. For example, in the beginning I chose an “international development” specialization, however later [I became] interested in environmental and energy policy/ economics. So, an initial assessment of your personal interests and courses’ scope/focus is necessary to choose the right direction for a career.* (Awardee from Ethiopia who studied in the United States, survey)

*I generally feel that I was adequately supported to pursue my studies. The course was very relevant to my career goals. All the lecturers at the University of Wisconsin–Madison were very supportive, and they helped me develop academically. I feel that studying at the University of Wisconsin–Madison actually greatly opened my mind to the academic world (and academic culture!). In short, I really loved the program and everything about it.* (Awardee from South Sudan who studied in the United States, survey)

When considering how the Scholarship Programs contributed to educational access in this section, two central themes arose from the focus groups and interviews. The first theme was raising awareness of definitions, theories, and policies related to issues central to democracy, civil society, and human rights. The second was how the relevance of course offerings and classes to an individual’s interests and professional pursuits was central to an awardee’s access to knowledge and experiences that aided in capacity building within their fields.

#### **VI.A.4. Financial support**

The financial support from the program was also identified as enriching awardees’ experiences (71.77 percent). Focus group participants emphasized repeatedly that without the financial support of the Scholarship Programs, they would not have had access to graduate education or research funds. Open-ended responses to survey questions showed the nuanced ways that the financial contributions impacted the awardees and others. For an awardee from Ethiopia who studied in the United Kingdom, they were able to send remittances home to their family while abroad. They also donated the mobility scooter that was purchased by the Scholarship Programs for them during their program to a “disabled person” in Ethiopia who did not have the financial means to purchase such a mobility aid. An awardee from Nepal, who studied in Singapore, stated that without a research grant for their PhD, they would not have been able to do a comparative study in two countries which added to the content and quality of their dissertation.

Finally, a Laotian awardee shared that the program, as a whole, allowed them to be more financially independent through an expanded personal and professional network, critical thinking skills they use in everyday life, and the confidence they gained through the program. Financial support not only provided access to higher education but it also changed the trajectories also changed trajectories for participants in what they could provide for others, do in their own research and work, and felt able to do and take on.

## VI.A.5. Friends

Among the survey respondents, 78.2 percent stated that their friends enriched their university/program experience. For awardees, having the support of the people around them made a difference. There were two themes that emerged from the focus group and interview data that is relevant to the role of friends during participants' programs. For a number of respondents, the continued connections that some awardees have with friends from university and friends that were cultivated through the program is of great significance to them now. The ways that friendships shaped their experience during and after the program are captured in the responses below to different survey questions by the awardees.

### **How has the Scholarship Programs contributed to your life outside of your professional career?**

*It exposed me to a broad set of authors and creators, it gave me an opportunity to bond with people who are now lifelong friends, it gave me confidence and a desire to help others.* (Awardee from Serbia who studied in Bulgaria, survey).

*It helped me to build networks [and friends] across different countries; some of them that I am friends with; some I still keep in touch with. Whenever I travel, I'm more likely to know someone in that country, and catching up on work and personal life. It has been incredible to get to know different people, we call each other the 'mini-UN,' a few of them visited me and I have done the same, and even had an invitation to a wedding, thus, the experience broadened my personal network and friendships.* (Awardee from Ethiopia who studied in the United States, survey).

### **Post-graduation, what were the tangible benefits you feel you received from the scholarship?**

*Appreciation for Western forms of education, interest in graduate studies, lifelong friends.* (Awardee from Uzbekistan who studied in the United States, survey)

*There are so many aspects. This scholarship was unique as it gave me a chance to become a pioneer social worker in Georgia and a chance to contribute to social work history making in Georgia. Definitely all doors were open to me and at the age of 23, I was one of the youngest graduates [from the] Scholarship Programs. Great job opportunities, great network locally, as two-three persons were given that chance from Georgia. We are a very strong professional network now and also lifelong friends with international networks and friends all over the world. It gave me an ability to be a change agent in my country and I am still working and enjoying this role and always will.* (Awardee from Georgia to the United States, survey)

For one awardee from Burma/Myanmar who participated in an interview, they shared that a friend, who was a fellow scholarship recipient, offered to get them a visa to Thailand at the start of the coup d'état in Myanmar in 2021 (Alumni D.2.17, interview, February 17, 2023). While this person ended up going to Australia, they appreciated the outreach from their friend in Thailand.<sup>68</sup>

## VI.A.6. Academic mentoring

Academic mentoring was the fourth most cited characteristic that enriched awardees' experiences during their programs (69.97 percent). Many focus group participants expressed gratitude for the relationship they had with their academic mentors while on the program. Mentors played a role in supporting academic growth and understanding within their fields of study as they helped awardees acclimate to higher education systems, they included awardees in research projects, they mentored them through internship placements during awardees' programs, and for some, they offered social support as well. Examples of awardees' shared reflections on their mentorships experiences have been included below:

*[I had an] excellent academic advisor. I'm very grateful to have had her. She was always available, approachable, and she was giving. [She offered] very good advice and guidance on how to write papers, how to be successful at the exams. [She did this] without any patronizing or holding of hands, or anything like that. But the guidance was so clear and so useful [to] follow, and you do the best you can.* (Awardee from Azerbaijan who studied in the United States, survey)

*Well, I was very lucky, because I had just joined [university name]. The professor decided to arrange for some sort of a regional research center in Central Asia, and they [were] looking for individuals who would be able to implement this idea. [I was the one who helped to implement it]. I cannot even describe you how difficult it was. But [we] finally arranged for a research center in Almaty in Kazakhstan.* (Awardee from Kyrgyzstan who studied in the United States, survey)

*With the professor, yes, I have contact. Now I'm thinking about research so I ask my professors to serve as references who [who said they] would love to support me. I posted my achievements [to my mentors] and they respond always. Sometimes they call me on Messenger. I have communication with them.* (Awardee from Burma/Myanmar who studied in the Philippines, survey)

The mentoring during and after the programs spoke to the overall holistic nature of the educational experience for scholarship alumni.

## VI.A.7. Institutional responses to the Scholarship Programs' scholarships and education access

For institutional respondents, access for awardees was primarily defined in relation to a "lack of access" or "loss of access."<sup>69</sup> One interviewee noted that "It was a great program for people that might not otherwise have had the opportunities that they did." Another interviewee responded that "it's a big loss to those people." A third said "They might not,

they probably never would have made it to graduate school in the United States, or maybe anywhere, and they are, I think most of them are very successful now.” All three examples reflected a sense that had the Scholarship Programs not existed, scholarship awardees would have had limited opportunity to study at these European or American universities. The reasons for this varied due to cost, program preparation, and support. Another issue for the lack of access was attributed to the institutional cost to recruit international students. One institutional interviewee noted:

*You know, we would allow, we'd capture students and attract students who we wouldn't normally otherwise be able to recruit, right? I wouldn't be going to some of these countries to, you know, recruit one student. So, it was just an amazing supplement to our efforts to bring in such a rich, diverse group of students.*

Another way that respondents and interviewees defined access was in relation to opportunities. Opportunities were characterized or exemplified by pathways to further study (PhD programs), collaborations (publications), internships, and jobs. These opportunities may be in awardees' country of origin or in other places. For example, one interviewee noted that one of their scholarship awardees was now working at the United Nations as part of the Special Rapporteur on the Rights of Persons with Disabilities and went to Geneva upon completion of their program. Another institutional interviewee noted that the partnership with Scholarship Programs,

*...allowed us to attract and educate students from low-income countries and countries in conflict who otherwise do not have the opportunity to study at an institution like [interviewee's institution]. These students return to their home countries and impact positive changes around women's rights, democracy building, economic development, and peace and prosperity programs.*

## VI.B | Access and Institutions

In terms of institutional survey responses, generally, since scholarship awardees were a part of a larger international student ecosystem, the majority of respondents indicated that they did not have a *somewhat/significant* impact on their general student services offered to international students, i.e., administrative support, on-campus cohorts, career advising, cultural acclimation support, financial aid, housing support, practicum/internship opportunities, language assistance, mental health/well-being services, and visa support.

When considering the size of the respondents' institutions, this makes sense since the institutions were (and are) generally well-positioned to receive a diversity of international students and have an administrative system that is set up to serve all international students. This was reinforced by the observation that many respondents indicated that they do have other international students who are enrolled in their institutions and that largely, the institutions themselves would not be impacted by the sunset of the programs.<sup>70</sup>

Given the lack of significant impact more generally, as reported by institutional representatives, there were several areas that respondents indicated how being a host institution for scholarship awardees had led to some internal change. On the logistical support side, this included administrative coordination and student services. On the curricular side, there was some change in terms of course or seminar content. In terms of how being a host university impacted how the university engaged with external entities, again, given the nature of the respondents' institutions, there was not much change. However, for a small subset of respondents, being a scholarship host institution significantly or somewhat affected how they engaged in alumni collaboration (n=4) and engagement (n=5), as well as engaging in institutional partnerships (n=6).

In terms of how the sunseting of the Open Society Scholarship Programs affects diversity at their institutions, again, respondents largely indicated there would be little to no overall impact on diversity at their institutions. However, again, there was a subset of respondents who indicated that the sunseting of an Open Society Scholarship Programs award would somewhat or significantly impact student diversity (n=8), geographic diversity (n=13), and funding for MA/MS students (n=13).

## EQ2—How did the Scholarship Programs inform higher education institutions' notions of “access” and how was that institutionalized (if any)?

In analyzing the qualitative survey data and the nine interviews, the following codes were generated and utilized—access, diversity, institutional impact, and partnership engagement. The rest of this section focuses on the themes that emerged across these four main codes. The findings below then represent the perspectives of the institutional representatives regarding their perceptions and/or their perspective on the scholarship program.

Some examples of how institutional respondents viewed how the Open Society Scholarship Programs awards created access for awardees have been discussed in Section VI.A. However, a few institutional interviewees and survey respondents also noted the access that the Scholarship Programs had provided for themselves personally. One interviewee shared the following:

*I loved my experience working with the OSF scholarships team, the grantees, and the other host institutions. As transformative as the experience was for the grantees, it also transformed me and my world view in ways I could not have anticipated. It remains a highlight of my career in international higher education to have worked with OSF in this capacity. I'm thankful to have been part of such an impactful endeavor.*

Through hosting the awardees, these respondents and interviewees benefited from engaging with the Scholarship Programs' team and learning more about the contexts that scholarship awardees came from through activities like participating in the selection process.

In contrast to views on access to their programs, several survey respondents and interviewees also commented that, while having access to the graduate program was one thing, this did not mean that the awardee should then seek asylum.<sup>71</sup> For example, one institutional survey respondent noted:

*[s]ome students from the selected OSF countries preferred to stay in [country] as a refugee student, seeking asylum, after the end of the scholarship period. The asylum procedure should not be the next step for an OSF scholarship holder.*

Additionally, one interviewee extensively noted (in contrast to other respondents), that they felt that participating in a master's degree program did not necessarily provide access to other opportunities. They noted:

*I personally felt that quite a few of our OSF scholars did not actually really need or benefit from a master's degree. To be honest with you, I felt OSF I mean, in that typical kind of North American way, I have to say was kind of valued, did not question the value of a master's degree, and I would frequently make the argument that actually what many of these scholars needed was not a master's degree, but was specialist training in human rights for their own particular professions.*

In terms of access and diversity, survey respondents and interviewees were asked how (or if) the Open Society Foundations awardees contributed to diversifying access to their institutions, responses generally focused on three categories—geographic, racial, and perspectives.

## **VI.B.1. Geographic diversity**

For some United States respondents, because their student populations were mainly domestic students, they noted that the scholarship facilitated an opportunity for international students to join their graduate programs. In general, when asked about diversity the respondents focused on the geographic diversity that scholarship awardees brought to their institutions. There were two distinctions between United States and European higher education institutions. Among the survey respondents, 50 percent of the United States respondents indicated that the sunset of the Open Society Scholarship Programs would impact the geography where their students came from, as well as program enrollment. United States higher education institution respondents also indicated that the work of the Scholarship Programs was a unique focus on post-Soviet countries. This contrasted to European higher education institutions, where the post-Soviet aspect of geographies was of little or no significance. Within European higher education institutions, however, there was an acknowledgement that the “university did not have a group of students from southeastern European countries before, so it was new to them [the university] also to learn about southeastern Europe.” In this way, the sunset of the Scholarship Programs has resulted in a decline of master's degree students from underrepresented countries, including post-Soviet Central Asia. As one interviewee shared “recruitment from the former-Soviet Union has declined significantly.”

## VI.B.2. Racial diversity

Some of the survey respondents and interviewees indicated that awardees were racialized minorities in their institutional and community contexts. One interviewee noted that in one predominantly white community, “There were challenges and experiences, sometimes with some of our overseas students, not just the OSF students, but overseas students generally, [who] experienced discomfort and different treatment by the local community.”

## VI.B.3. Diverse perspectives

Institutional representatives made general comments regarding epistemological or ontological diversity. Several respondents/interviewees made specific comments regarding awardees in their program. One institutional interviewee noted:

*[Our class] had a really great experience with the OSF scholar who joined us, and it would have been fantastic to have other folks like that student join us because he was, in reality, sort of a highlight of a student, a really strong leader. [He was a] really positive person who, I think, had great relationships with a lot of other students, and sort of was a, and this is a strange phrase, but like an emotional leader in sort of setting a relationship tone of [sic] connection and community among the graduate students.*

Several interviewees noted that having students from post-Soviet countries challenged faculty to reflect on their teaching materials, e.g., they “made some of us think differently about how we teach some standard areas of international human rights law.” And others noted that the profile of the students themselves (generally having some practitioner experience and coming from geographically diverse contexts), enriched the programs. As one institutional interviewee noted:

*I would say our OSF scholars, by and large, were probably [sic] better students. I mean, they tended to come with experience[s] of their own, and certainly [with] different experiences from our traditional profile of an American law student. So, having years of professional experience abroad, having been exposed to a variety of different personal and other settings, you know, I think they tended to bring a bit more confidence with them.*

EQ2 was posed to see if hosting the awardees resulted in some type of institutional change within host higher education institutions. In general, the response seemed to be that because the awardees made up a small portion of the international student body at their institutions, beyond the geographic diversity aspect, there was little impact acknowledged. As one institutional interviewee expressed:

*Our institution will be OK. I am more concerned about the impact for scholars who were once funded by these wonderful OSF scholarships. I am grateful for OSF's support to these scholars and regret that this program is coming to a close. OSF support has had an immense positive effect for scholars in the post-Soviet space.*



## VI.B.4. Contribution to the development of course content and programs of study

Another area where there was some acknowledged impact was regarding learning materials and course content. Again, to go back to the comment about post-Soviet graduate students, the institutional interviewee noted:

*I think it [the Scholarship Programs] probably had an impact upon how we taught, and to a certain extent, what we talked... given that there were so many students initially from the post-Soviet countries. For example, that kind of made some of us think differently about how we teach some standard areas of international human rights law.*

There was also a broad acknowledgement that the university was a better place as a result of hosting awardees as illustrated by comments like “[h]osting OSF scholars made us a better institute. OSF scholars are great people who brought valuable perspectives to our programs.” This sentiment was shared between several interviewees and respondents. Finally, several respondents and interviewees noted that being a host university resulted in “many instances of cooperation with universities in the Southeast European region and much research collaboration with scholars from these universities” and contributed to the broader research and engagement efforts of their universities. Similarly, another interviewee noted, “[t]he program enriched the lives of not just the scholars (which, I assume will be asked later) but the teaching staff of the University too. It has a very positive impact on staff research output and collaboration with scholars from the region.”

Finally, two interviewees credited the Scholarship Programs partnership as being instrumental in either the establishment or the building of nascent graduate programs. As one interviewee noted:

*To be honest with you, I mean, I think it helped legitimize the quality and the caliber of our program. I think it communicated to our faculty at the law school here and at the wider university, that we are a serious master’s program. We’re academically rigorous. We’re attracting a very, I think, diverse, but high caliber profile of student to the program, and to have that partnership with an organization like OSF. I think, like I said, I think it gave us a little bit more legitimacy and a little bit more credibility when you know trying to pitch and talk about the importance of this new master’s program.*

***“[t]he program enriched the lives of not just the scholars (which, I assume will be asked later) but the teaching staff of the University too. It has a very positive impact on staff research output and collaboration with scholars from the region.”***

## VI.B.5. Community engagement

When thinking more broadly about the community in which the students were studying, the general response was understandably focused primarily on the campus community. Some of the survey respondents and interviewees acknowledged that they assumed that the students experienced some hardships being primarily (but not exclusively) racialized minorities and that those hardships were experienced outside the institution. For example, one interviewee noted:

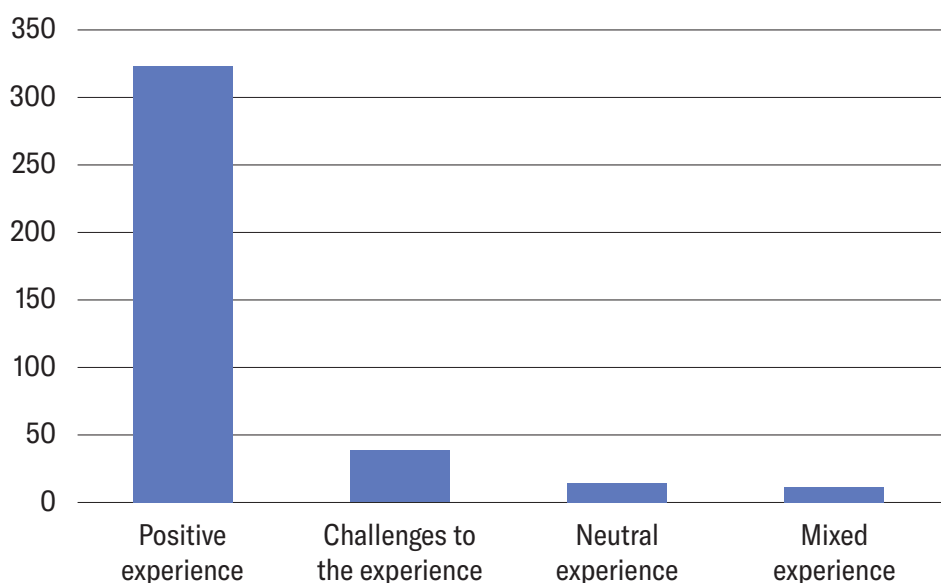
*[ There were] problems that existed in those areas. And oh, no, the problems did not come with the students to the university, because we made sure that they all knew. The issues, they've solved on the expected behavior. But the university became aware of the existence of students with backgrounds from countries that are in conflict, so on, and so forth, and in terms of community. The community got to know people from another part of the world which they had not seen many before.*

One area that was not captured in the survey and focus group data was the way in which partnering with the Scholarship Programs facilitated some changes regarding creating more physically accessible campuses for institutions that previously did not have them. For example, to make different summer school campuses more accessible for students who needed physical or visual accommodations, partner higher education initiatives invested in building those accessibility structures (e.g., ramps, software support that could read to students who required visual accommodations). These changes to the physical spaces to the campus remain in place beyond the Scholarship Programs' engagement and may be considered a contribution to institutional change.

## VI.B.6. Alumni responses regarding host university experiences

When thinking about educational access, awardees' responses shed light on how the awardees felt about their lived experiences as students and scholars at their host universities. Among survey respondents, 377 awardees responded to the open-ended prompt, "Briefly describe your general experience as a student at the university you attended." Upon review of the responses, there were four categories that emerged. These included: the sharing of positive experiences and thanks (n=323), comments on the challenges that were experienced at the host universities (n=34), comments that indicated the time at university was remembered as a neutral experience (n=11), and remarks that shared a mix of positive and challenging experiences (n=9). Figure 8 provides a breakdown of the responses.

**FIGURE 8.** Scholarship awardees’ description of their experiences at their host university(ies)



The awardees’ experiences were overwhelmingly positive at their host universities. *Enriching, life changing, very good, and excellent* were descriptors used time and again throughout the awardees comments. Among survey respondents, 27 respondents wrote directly about the quality of their academic experiences during the program. Other respondents focused on the support that they received and the connections that they made in having been a part of the scholarship programs.

Below are four quotes from the survey responses. They were selected from across respondents who had positive experiences during the program, were from different countries, and who studied in distinct locations.

*Studying [law] at [an institution in the United States] under the support of OSF was the best experience of my life. On top of the professional skills I got from the program I attended, I also built strong relationships with my OSF cohort. OSF staff were extremely helpful, and I was very sad to hear that the Scholarship Programs had ended. I want many more people to have the same experience as I did and come back home to make a difference in their country.* (Awardee from Cambodia to the United States, survey)

*My experience at the [school of medicine] exceeded my expectations. I feel I am privileged and honored [sic] to be taught by and interact with experts in public health and policy at the school. I had a wonderful time studying at the [institution]. The experience was a life-changing journey for me. I learnt from top-notch professors in public health. Studying in a multicultural environment opened my eyes to look at things differently. Furthermore, it would have not been possible to study in an educational system that promotes critical thinking and knowledge sharing through open discussion and debates without the generous financial support of OSF.* (Awardee from South Sudan to the United Kingdom, survey)

*My general experience as a student at [my host university in South Africa] was an inspiring one on campus and outside campus. On a special note, the academic program was well designed with a good number of workshops, easy interactions with supervisors and library tours, just to mention a few. Though the accommodation was a little bit high, the university offered me a quiet environment conducive for studies. I am happy to have sailed through.* (Awardee from Democratic Republic of the Congo to South Africa, survey)

*Studying at [a top British university] was the best experience of my life. It [shaped] me both personally and professionally. I was part of the best academic environment in the world which raised my criteria and pushed me towards academic excellence.* (Awardee from Macedonia to the United Kingdom, survey)

Focus group participants also shared their experiences attending their host institutions. Of particular interest was an experience shared by a research scholarship awardee from Azerbaijan who attended a top university in the United States. One central point they made during the discussion was that they were able to publish five articles while on their scholarship in 2013 (Alumni A.2.3, focus group, February 3, 2023). This awardee did not have the capacity to focus on research nor did they have access to comprehensive collections for their research in Azerbaijan. The award allowed them to increase their research productivity, which was beneficial for their standing at their home university. An awardee from Palestine who studied in the United States spoke to the ways that their time at their host university broadened their understanding of themselves within the greater world context. This awardee reflected:

*I did a training at the Center for Gender and Sexuality Rights. I really got to know a lot about what exists outside of my tiny little bubble of living under occupation in Palestine, where I thought, 'Okay, the Palestinian issue is the center of the world.' I got to know that there are endless issues that are at the heart of people's existence.* (Alumni D.2.10, focus group, February 10, 2023)

These excerpts are examples of how the university experience influenced what awardees had access to, were able to do, and how the experience affected their understanding of themselves in relation to others.

A handful of alumni described both positives and challenges from their experiences at their host institutions (n=9). Another set described their experiences at their host universities in more neutral or utilitarian terms (n=9). For those who encountered both positive experiences and challenges, they identified strong support systems at their universities. For those who were neutral about the experience, they did not identify the same level of support as others at their host universities. Themes were inconsistent among those who reported both positive experiences and challenges, as well as those who were neutral in their assessment of their university experiences.

For those who shared both positive experiences and challenges during their time at their host universities, some examples include:

*Good academic program. Good tutoring and support after graduation (recommendation letters). Challenging administration. Extremely unhelpful health insurance navigation. Stipend did not accommodate inflation.* (Awardee from Egypt to the Netherlands, survey)

*It has been both positive and disappointing. I had some amazing professors and friends on and off campus. On the other hand, the U.K. is expensive and compared to other countries such as Germany, courses were delivered in a very traditional, teach-centered manner. We had no interactive assessments such as article and policy reviews, presentation, and continuous assessments.*

(Awardee from Ethiopia to the United Kingdom, survey)

Of the nine awardees who had more neutral responses to the survey prompt, an awardee from the Democratic Republic of the Congo to France wrote, “C’était pas mal” [It was not bad]. Similarly, an awardee from Albania to Canada wrote, “It was ok, but not exceptional.” Finally, an awardee from Cambodia to the Philippines commented, “It’s ok. It did not reach my expectations since the system is still old and bureaucratic.” Although the responses reflect respondents’ ambivalence about their experience(s), these quotes also illustrate that the ambivalence was not isolated to the United States or Europe.

Finally, 36 respondents said that they had challenging experiences at their host universities. Table 4 identifies the themes pertaining to the challenges, and quotes that give voice to the awardees’ experiences.

**Table 4.** Challenges experienced by awardees at host universities

| Theme                 | Count | Excerpts from Survey Responses  |
|-----------------------|-------|---|
| <b>Mental health</b>  | 8     | “Although I reported depression and environmental adjustment issues with the university, I was only advised to leave and go back home by some uni staff.” (Awardee from Ethiopia to the United Kingdom, survey)   |
| <b>COVID pandemic</b> | 7     | “I enjoyed being a student at (name of university). I was offered to study for a PhD there, but I kindly rejected and asked to postpone it to later years. It was mainly because I was there in lockdown period and felt terribly lonely. As for academic quality of the university, I found the quality of teaching and subjects too generalized.” (Awardee from Azerbaijan to the United Kingdom, survey) |

(continued on the next page)

**Table 4.** Challenges experienced by awardees at host universities (continued)

| <b>Theme</b>                         | <b>Count</b> | <b>Excerpts from Survey Responses</b>   |
|--------------------------------------|--------------|---|
| <b>Racism</b>                        | 5            | <p>“I have multiple incidents of racial discrimination from two different professors. I reported to my academic advisor of the time and they never responded. At the time, I decided to let go of the issue as I was ‘just tired.’ On the other hand, my thesis supervisor and the administration was great for all type of support I turned to them asking for. Except the one topic of racism. I have hoped if there was some sort of a buddy program or any type of induction at the university to help navigate the school and living in an entirely new country.” (Awardee from Sudan to France, survey)</p> <p>“I learned a lot from my classes and some of my professors. The one negative thing I remember was the level of racism I had to encounter in my own school, my CSLA other African colleague and I used to feel we’re not welcome and our problems we invalidated. At some point, we just stopped showing up to the school’s events because the only reason they wanted us there was to show diversity.” (Awardee from Egypt to the United States, survey)</p> <p>“As one of the few African students attending the university it wasn’t easy to make friends and also connect with other students. However, this was also an opportunity for me to show case and also build an understanding about Africa and Black people in general both at the university and my place of work.” (Awardee from Eritrea to Hong Kong, survey)</p> |
| <b>Did not finish program</b>        | 4            | <p>“Although I was admitted to this program, due to a family issue, I couldn’t finish the program.” (Awardee from Azerbaijan to the United States, survey)</p>  |
| <b>Disliked the university</b>       | 3            | <p>“The university had not enough concerns and cares for international graduate students.” (Awardee from Myanmar to the United States, survey)</p>  |
| <b>Inadequate disability support</b> | 3            | <p>“I am a deaf OSF scholarship recipient. From the beginning OSF was discriminatory regarding my request of reasonable accommodation. It started by sabotaging and cancelling my Georgian summer school program. I didn’t attend the summer school due to lack of access. At [university name], I was not provided American sign language interpreting. The university accessibility office started working at the end of the semester. There was no experienced staff that knows my need. Due to lack of support I was cornered and later forcefully withdrawn. I explained the lack of support for both OSF staffs and the university. They mutually agreed and decided to withdraw me from my program. I returned to my home country mentally broken and still to this day.” (Awardee from Ethiopia to the United States, survey)</p>   |
| <b>Language</b>                      | 2            | <p>“A francophone international student in an English country.” (Awardee from the Democratic Republic of the Congo to the United States, survey)</p>  |

**Table 4.** Challenges experienced by awardees at host universities (continued)

| Theme                                  | Count | Excerpts from Survey Responses   |
|--|-------|--|
| <b>Colonialism and privilege</b>       | 2     | “It was a bit intense, coming from Egypt, I did not know what to expect. What bothered me the most is the sense of entitlement within some of my cohort and the fact that they did not understand that the world is bigger than the US and so many things are happening. I didn’t like the narrow perspective of viewing the world.” (Awardee from Egypt to the United States, survey)   |
| <b>Lack of support for new parents</b> | 2     | “It was a hard being mom and starting for master. I didn’t want to be separated from my two years old son, so in this regard couldn’t find a house for living here in [name of city]. Because university accommodation didn’t cover mother with children and none of the landlord/agency accepted me with my son. Therefore, I only able to come to [name of city] first week of December which was ending of first term. I rent extremely expensive house and lost the chance of face-to-face education only because of being mom and did not get any support.” (Awardee from Azerbaijan to the United Kingdom, survey) |

Two of the themes which are reflected in Table 4—lack of disability support and racism—also emerged from the focus groups. A visually impaired awardee from Burma/Myanmar who studied in the Philippines reported that their host university had no disability services. The support that they received came primarily from faculty members who attempted to find alternative course materials for them. While the awardee appreciated the work done to support their participation in the program, having no formal disability support services in place during their completion of their master’s program at their host institution was challenging. An awardee from the Democratic Republic of the Congo relayed an experience about how difficult it was for them to find an internship while studying in France. While other members of his cohort landed internship placements quite quickly, it took him weeks to find a placement, with no outside assistance from the institution. This awardee, who is Black, did not outwardly name racism, but they implied that their experience was quite distinct from others in their cohort.

## VI.C. Access and Philanthropies

Much of the data that the Open Society Scholarship Programs captured over time was on student and scholar numbers and counts of individuals who applied, enrolled, and completed their programs. The counts provided an impressive number of those who have sought, participated in, and completed the programs. The list of home countries of the participants also exemplifies the Scholarship Programs’ vision to contributing to the building of civil societies within country contexts where political factors impeded doing so. With the sunset of the Open Society Scholarship Programs, the loss in student and scholar mobility numbers is evident. However, it is in exploring what happened after participating in the Scholarship Programs that additional details emerge on the different ways that withdrawal of these funds will affect individuals, and through the ripple effect of the ecological model, what will happen within communities and beyond.

The findings in this section address EQ3— “Who benefits when philanthropies commit to education as an expression of their commitment to civil society? What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility?” To answer these questions, the evaluation team examined aspects of the awardees’ lives following their educational experiences at their host universities.

## **EQ3—Who benefits when philanthropies commit to education as an expression of their commitment to civil society building? What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility?**

### **VI.C.1. Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?**

A central tenet to the findings in this section is that Scholarship Programs’ awardees would not have had access to the degree programs and research funding made available through the Scholarship Programs, i.e., by facilitating educational access for individuals committed to building civil society within their country with a focus on the social sciences and humanities. George Soros’s (2009) theory of reflexivity then captures the interplay between knowledge and lived experiences. His theory postulates that the cognitive function and the participating, or manipulative, function inform how the scholarship awardees’ have changed through their experiences at their host institutions.

In this way, by facilitating access to new knowledge attained through being in a different world context, the Scholarship Programs’ awardee experiences provide insight into the pull between thinking and reality, which are foundational to the theory of reflexivity (Soros, 2009, p. 5). Through the cognitive and manipulative functions that came together through the scholarship experiences, negative feedback “brings the participants’ views and actual situations closer together” (Soros, 2009, p. 6). It is through negative feedback that there can be “self-correcting” which then leads to new understandings. Thus, it is through the awardees’ new knowledge and understanding of themselves in relation to the world around them pre- and post-award that the evaluation team gained insights into what will be missed in the absence of the Scholarship Programs, and if other programs would no longer operate.



For the purposes of EQ3, the evaluation team looked at open-ended questions from the focus groups and retrospective evaluation questions<sup>72</sup> from the survey. The themes which emerged included:

- If and how awardees viewed themselves as change agents;
- Awardees' sense of economic wellbeing;
- Awardees' responses to how strongly they could provide for their families; and
- Their engagement outside of their work responsibilities.

### **VI.C.1.a. Change agents and affecting positive change (professional sphere)**

In both focus groups and interviews with Scholarship Programs' awardees and the survey, scholarship alumni were able to (1) identify the ways that they are change agents in their communities (focus group/interview), and (2) share that they felt like they were affecting positive change professionally on most days (survey).

For example, one of the interview questions was, "Do you feel you are a change agent in your community? If yes, then how?" While the question was direct and unexpected by some awardees, all of the focus group participants responded affirmatively—that is, in some way, they do feel like change agents in their communities, or beyond. The quotes below capture the way that some of the focus group/interview participants saw themselves as change agents.

*I believe, yes, in regard to promoting early childhood education that I am one of the change agents, especially in my community. I'm conducting a project on child- to-child learning in very rural areas of Ethiopia. So, I believe that I'm working on early childcare and education as, you know, a change agent...* (Alumni A.2.7 an awardee from Ethiopia who studied in the United States, focus group, February 7, 2023)

*Currently, my country is in crisis because of the military coup, and you know, human rights abuses. And you know that kind of violence has been ongoing for many years...So that research [from my scholarship] is also very, very relevant, because, you know, adoption of that kind of international laws and norms to local [settings] has become effective. The local mechanism is very crucial. In that mechanism, the religious leaders' rules are also important. So, I started participating in this research. Ever since the military coup in Myanmar, there has not been an education system. They have not had education, including during the pandemic, for more than three years, so they cannot [get] formal education at all. So, since that time, I have been teaching human rights and transitional justice, and also peace and conflict studies online university. And this is totally like a free education for the youth who cannot go to university. We are providing this education to equip students with knowledge and skills after the coup for the transition and reform of the country.*

(Alumni A.2.9, an awardee from Myanmar who studied in the United Kingdom, focus group, February 9, 2023)

*I'm a part of a bigger community that is working for different campaigns. We want to change and to make the lives of vulnerable and marginalized groups better. We work predominantly in former Soviet countries, and we work with marginalized groups, including LGBT, who are facing more severe and more homophobic attacks, both from the state and other groups. So, I'm a part of the different*

*campaigns, working and helping and being a voice and advocate, an advocate from outside.*

(Alumni D.2.9, an awardee from Azerbaijan who studied in the United Kingdom, focus group, February 9, 2023)

*Well, that's a very difficult question, because basically, I'm not in my community right now, because I'm doing my PhD about my people. I'm exploring the work experiences of Chinese and Georgians in Poland. So, my field is about migration. On the one hand, I feel like I'm definitely contributing to the field, especially the social research... I really feel like I'm contributing. But since I'm not there, it feels like, you know, contributing from kind of afar. But, you know, when you're in the academy, you don't see the results of your work immediately. So, it's like, okay, I'm doing something, but still, I'm not sure if there is an immediate effect. So, that's why it's a mixed feeling for me.* (Alumni C.2.16, an awardee from Azerbaijan who studied in the United States, focus group, February 16, 2023)

*My original theory of change, of course, revolves around social change and education. Then I came here, studied international development, studied multilateral organizations, and how they work, and this dialectic between these different stakeholders. And right after that I came to the realization that we need more powerful tools to scale up our work at the scale that can be impactful. So, now we integrate technology to achieve these goals that we have started with before the program, before this I did not know about all these complications, and I did not know that [the] component that is necessary is technology. But right now, I think without such knowledge, we would never have reached there. I would make, like two points: The first one is that they, OSF, did not [change] an individual, we got [the change] as the whole village. They didn't transform one changemaker, they transformed the village around them. And the second point, is that I am willing to fight for [the Scholarship Programs] and to bring them back. Whether it's a focus group again, whether it's being in, like, certain meetings, to advocate for this or go in our own and formalize a scholar union. Because it really does change the world.* (Alumni B.2.2, an awardee from Egypt who studied in the United States, focus group, February 2, 2023)

*After I completed my internship, I did several projects related to education, but instead of doing classic, like, "Let's learn grammar." Mine was like, "What did you use to study in the U.S.? What [should] they be expecting?" "What are the essential skills?" "How do you populate application?" "How do you write?" But beyond immediate education, I think I also contributed to various civil society organizations, as well as to an international organization, in various capacities working across the Universal Declaration of Human Rights. So, each subject area would touch upon one of the articles. One of the examples I would give [is] when I interned for an international organization and in my capacity, I managed to relocate journalists who were threatened by their governments to another country so they could breathe a little bit and have a life. So, that's in a nutshell.* (Alumni C.2.20, an awardee from Turkmenistan who studied in the United States, focus group, February 20, 2023)

The question asked awardees to think about their contributions at an individual level when many were not accustomed to centering themselves as individuals devoid of colleagues and supporters of change. It was interesting to observe how, for respondents who were initially hesitant to say "yes," once they started talking and explaining how they have been involved in changes, also found that they could see their individual contributions to the whole.

There are a few responses that warrant additional comments. For example, there was an Azerbaijani awardee, Alumni C.2.16, who studied in the United States and participated in a focus group. While this awardee is no longer living in Azerbaijan, they do still see themselves as an agent of change in their community. For this awardee, physical presence in what they consider their “home country” is not required to be a change agent in that country. Second, an awardee from Egypt (Alumni B.2.2, focus group, February 2, 2023) named the way the scholarship had a ripple of effect between them and their community. Their response highlights the ways in which while the individual awardee may have received the scholarship, the community around them benefited from the scholarship as well.

Another question regarding making change was posed in the survey when we asked awardees, “How often do you feel like you are affecting positive change at work?” The responses were *everyday*, *most days*, *some days*, and *not at all*.

As shown in Table 5, a total of 470 awardees answered this question. Among the respondents, 164 of the 470 respondents (35 percent) shared that they feel like they are affecting positive change at work every day. An additional 47.5 percent feel like they are affecting positive change most days at work. When running this data by reported gender, it is of note that there is a difference between how females and males responded to this question. Approximately 42 percent of males reported feeling like they affected positive change at work, whereas only 26 percent of females. Females reported at higher rates that they felt they could affect positive change most days (52 percent) and some days (21 percent) in comparison to their male counterparts whereas only 26 percent of females reported feeling that way. One respondent who identified their gender as “other” noted that they felt they could affect positive change every day. Finally, two additional respondents who preferred not to share their gender noted that they too felt they affected positive change at work every day.

**Table 5.** Frequency of awardees’ perceptions regarding personal impact (by gender)

|                          | Everyday | Most Days | Some Days | Not at All | Total |
|--------------------------|----------|-----------|-----------|------------|-------|
| <b>Total</b>             | 164      | 223       | 75        | 8          | 470   |
| <b>(Valid %)</b>         | 34.89%   | 47.45%    | 15.96%    | 1.7%       | 100%  |
| <b>Female (#s)</b>       | 57       | 115       | 46        | 3          | 221   |
| <b>(Valid %)</b>         | 25.79%   | 52.04%    | 20.81%    | 1.36%      | 100%  |
| <b>Male (#s)</b>         | 104      | 108       | 29        | 5          | 246   |
| <b>(Valid %)</b>         | 42.28%   | 43.9%     | 11.79%    | 2.03%      | 100%  |
| <b>Other (#s)</b>        | 1        | 0         | 0         | 0          | 1     |
| <b>(Valid %)</b>         | 100%     | 0%        | 0%        | 0%         | 100%  |
| <b>Prefer not to say</b> | 2        | 0         | 0         | 0          | 2     |
| <b>(Valid %)</b>         | 100%     | 0%        | 0%        | 0%         | 100%  |

Beyond professional experiences, awardees were also involved in volunteering, community organizations, INGOs, advocacy work, religious institutions, professional networks, publishing their research, and alumni groups. Among the 424 awardees who responded to the survey prompt “Since completing your program, what activities or groups have you been involved with outside of work and your home life?” 390 (92 percent) indicated that they were active in an activity or group outside of their work and home.

Soros’s desire to strengthen civil society is embodied by people like the 390 alumni respondents who are getting involved beyond their day-to-day responsibilities to make an impact with others around a shared interest.

When considering who benefits from scholarships opportunities, in addition to awardees’ professional settings, the organizations and groups that the awardees dedicate their time to are also beneficiaries of the program.

In the excerpts below, respondents reflected on the aforementioned survey question about being a change agent. Awardees’ responses have been broken down by the type of award that they received.

### Civil Society Leadership Award

*I start to support high school grads with their university transition, share what I learn about co-living and independent studies, civic engagement, offer seminars on how to choose a major and how to be a more critical thinker. Also, I start to engage with like-minded individuals from all walks of life to exchange ideas and professional experiences via hiking, cycling, running groups, and other trips. I also join other digital rights group in raising awareness and advocate for internet freedom and safety). (Awardee from Cambodia who studied in the United States, survey)*

*Je suis volontaire en tant que mentor dans une organisation de jeunes dénommé Tosungana. Nous aidons les jeunes congolais dans leurs recherches des bourses et admissions dans les universités à l'international. Notre expérience avec OSF nous procure une sorte de notoriété au pays ce qui nous facilite le travail. Beaucoup de jeunes voudraient profiter de l'opportunité que nous avons obtenue et nous faisons de notre mieux pour les orienter. [I volunteer as a mentor in a youth organization called Tosungana. We help young Congolese in their search for scholarships and admissions to international universities. Our Professional experience with OSF gives us a kind of notoriety in the country, which makes our work easier. Many young people would like to take advantage of the opportunity we present, and we are doing our best to guide them. (Awardee from the Democratic Republic of the Congo to Canada, survey)*

***Soros’s desire to strengthen civil society is embodied by people like the 390 alumni respondents who are getting involved beyond their day-to-day responsibilities to make an impact with others around a shared interest or activity.***

*I am a member of the Ethiopian Social Workers Professional Association. In the association, I contribute to fundraising, resource mobilization, and organizing events in addressing pressing social problems such as COVID-19, GBV, child protection, and environmental protection among others. (Awardee from Ethiopia to in the United States, survey)*

*I have created two associations, one of which campaigns for the peaceful coexistence of peoples and the other for the fight against hunger and poverty in Africa. I organize twitter spaces followed by thousands of people. One space was followed by 15,000 people. And the others are on average followed by at least 1,000 people. In most of these spaces I talk about the rights of minorities in my home country, how to build a true rule of law and a country where everyone will live in peace, respecting cultural diversity and opinions. I also talk about existential problems for my country and current conflicts. Several hundred people participate to the point where it is not possible to give everyone a chance to speak. I get a lot of positive feedback. Many people contact me privately to ask me to talk about a variety of topics. (Awardee from the Democratic Republic of the Congo to France, survey)*

### **Undergraduate Exchange Program 2009**

*I worked with NGOs in my country like Medica Zenica, on different projects, all regarding Bosnia's post war challenges, educational projects that focus on learning about differences and challenges of postwar society. Some of the specific issues that these projects addressed have been gender based violence, interreligious learning in Europe, genocide in Srebrenica, and developing trauma sensitive approaches to dealing with war rape victims. Lately, I have focused on treating and interpreting war legacy through work in museums, memorials, and education in general. (Awardee from Bosnia and Herzegovina to the United States, survey)*

### **Global Supplementary Grants Program**

*I am a member of different associations around the world, among others: Full Professor of International Relations and Diplomacy; Foreign Affairs Committee of Croatian Parliament Member (4th mandate); World Academy of Art and Science Fellow; Global Young Academy Fellow; Policy Advice Committee of the Inter Academy Partnership Fellow; Rotary Peace Fellow 2017; Executive Committee Member of Croatian Club of Rome. (Awardee from Croatia to Germany, survey)*

### **Social Work Fellowship Program**

*I am the founder of the Georgian Association of Social Workers, besides [being] founder of Academic Programs of Social Work in Georgia together with my colleagues. I've been an acting vice president of the IFSW, Europe. I'm also a member of many local, regional and international professional networks in the social science field. (Awardee from Georgia to the United States, survey)*

While correlation and causation was not established in this evaluation, what is evident is Scholarship Programs alumni overwhelmingly believe in the power of civil society.

In the bigger picture, when considering who benefits when philanthropies commit to education as an expression of their commitment to civil society, the evaluation data focused on change showed that communities in which alumni live, and the organizations

and institutions in which the alumni work and volunteer, are often the beneficiaries. The changes described above speak to the ways that scholarship alumni are acting as change agents in their communities. The socio-ecological model explores the interplay between the individual, the relationships they have, their communities, and the organizations in which they are members. It is by traversing across these boundaries, underpinned by their commitment to civil society and their experience as Open Society Scholarship Programs scholarship awardees, that they are contributing to change.

### VI.C.1.b. The benefits on economic wellbeing

Open Society Scholarship Programs' awardees were asked to report their economic wellbeing prior to and following their awards. The response options included whether they saw their economic wellbeing as: *strong*, *stable*, and *weak*. In the absence of being able to do an economic analysis of each awardee's financial situation, this question relied on self-reporting to provide insights on the ways the awardees saw their own economic wellbeing pre- and post-award. Table 6 below shows the economic shifts that occurred between pre- and post-award.

**Table 6.** Economic wellbeing pre- and post-award (n=493)

| Pre-Award              | Post-Award | Total |      |         |
|------------------------|------------|-------|------|---------|
| <b>STAYED THE SAME</b> |            |       |      |         |
| Weak                   | Weak       | 30    | 6%   | 34%     |
| Stable                 | Stable     | 124   | 25%  | (n=166) |
| Strong                 | Strong     | 12    | 2.5% | —       |
| <b>DECREASED</b>       |            |       |      |         |
| Stable                 | Weak       | 27    | 5.5% | 8%      |
| Strong                 | Weak       | 5     | 1%   | (n=40)  |
| Strong                 | Stable     | 8     | 2%   | —       |
| <b>INCREASED</b>       |            |       |      |         |
| Weak                   | Stable     | 142   | 29%  | 58%     |
| Weak                   | Strong     | 68    | 14%  | (n=287) |
| Stable                 | Strong     | 77    | 15%  | —       |

Based on the self-reported data, most of the respondents saw positive gains in economic wellbeing following their scholarship programs placement.

As seen in Table 6, the largest shifts were:

- 58 percent (n=287) of the 493 respondents showed an increase in their economic wellbeing.
- 29 percent (n=142) responded that they went from weak to stable pre- and post-award; and
- 34 percent (n=166) of respondents stayed the same, with 25 percent (n=124) remaining stable, 6 percent (n=30) remaining weak, and 2.5 percent (n=12) remaining strong.

For the majority of those reporting stable or strong to weak economic wellbeing, the majority went from being self-employed to working in higher education in some capacity.<sup>73</sup>

As a corroborating question, the survey also included an item to describe the “... opportunities you have had so you can provide for yourself and your dependents?” As seen in Table 7 below, 86 percent (n=418), reported that they were either strong (32.72 percent) or stable (53.29 percent) in providing for themselves and their families. While this was not a pre-/post-award question since it is based on perceptions of pre-/post-award, it does indicate that a large majority of alumni felt they were able to provide for their families.<sup>74</sup>

**Table 7.** Awardees’ responses regarding opportunities for themselves and their dependents

| How Would You Describe...  | Strong        | Stable        | Weak         | Missing | Full Total | Valid Total |
|--|---------------|---------------|--------------|---------|------------|-------------|
| ... the opportunities you have to provide for yourself and your dependents?<br>(Valid %) | 159<br>32.72% | 259<br>53.29% | 68<br>13.99% | 102     | 588        | 486<br>100% |

## VI.C.2. What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility?

The previous section examined the question, “Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?” This section explores the “What would happen if...” question.<sup>75</sup> This section outlines the potential ramifications of ending the Scholarship Programs on host institutions and the awardees understanding of key concepts that support democracy and civil society (which is specific to the Foundations more broadly).

### **VI.C.2.a. Potential ramifications of ending scholarships on host institutions**

When asked how the sunseting of the Open Society Scholarship Programs would impact them, institutional respondents in both the survey and interviews generally felt that their institutions would not be significantly impacted. Given that many of the host universities were well-established higher education institutions, they noted that they have other strategies to recruiting international students and that the scholarship students were a small percentage of the international student body. But, as mentioned in Section VI.B, respondents indicated that it was unlikely that their programs and institutions would be able to enroll future students that are from the Scholarship Programs' geographies; in most cases, the stated reason was because of the cost of post-graduate education and the lack of funding for master's degree programs. In this way, without the Open Society Foundations or other foundations engaging in individual grantmaking, the pathway to fostering concentrated diffusion becomes much more constrained or in some countries (or regions) becomes largely cut off.

Understanding how survey respondents and interviewees perceived the relationship between their universities and the Open Society Scholarship Programs was useful in understanding how foundations/philanthropies may engage with partners in the future. What emerged through the survey respondents and interviewees was a range in terms of how people described their relationship with Open Society. A number of interviewees and survey respondents indicated that their institutions (or institutional representatives) were involved in varying degrees with the scholarship selection process. A few indicated that they (and/or their colleagues) were invited to collaborate with the Open Society Foundations on other policy initiatives and areas beyond scholarships. Being a host university for a Scholarship Programs' award provided opportunities for different stakeholders to engage in thought partnership around faculty-student mobility, social change, democracy, and civil society building.

Among the respondents, the deepest relationships were between individuals who had personal connections to the Foundations. However, once those relational connections were no longer there, the institutional partnerships became more ambiguous. For example, one interviewee noted, "We enjoyed a very valuable and important relationship with the Open Society Foundations. The ending of that relationship is sad and regrettable. We had hoped that we would be welcomed into the new Open Society University Network opportunity but have been repeatedly frustrated in our attempts to do that with Bard College colleagues."

### **VI.C.2.b. Potential ramifications of ending scholarships on understanding issues critical to civil society**

Inherent in the work of the Scholarship Programs was a commitment to civil society, democracy, human rights, and disability rights (along with rights based on ethnicity, gender, religion, and sexuality). During the focus groups and interviews, the evaluation team asked participants if their understandings of any of these concepts changed during the programs. The responses were mixed. For some individuals, the concepts were brand new and so their experience in the program very much shaped their understanding of these concepts. For others, the concepts were known, but their educational experiences deepened their understanding, often in the theoretical framing of the concepts.



The focus group/interview excerpts below highlight how awardees' understanding of four concepts—civil society, democracy, human rights, and disability rights—shifted over time, with a special emphasis on how the topic of disability rights was prominent in a number of awardees' responses.

*During/after the program I was able to get different perspectives on what I used to believe as a reality. Now, reality is relative to me. One of the most important things I have learnt is human rights issues. For instance, LGBTQ... is a pressing human rights concern in the U.S.A. In my home country, it is still a taboo to discuss these issues. Before my studies, I was even afraid of talking about the topic. This time, my understanding about myself has totally changed. I also believe in the free movement of people from one place to another regardless of their origin. People should not be restricted from movement in the form of refugees and IDPs.* (Alumni A.2.7, awardee from Ethiopia who studied in the United States, focus group, February 7, 2023)

*As I'm an alumni of OSF, I had many opportunities to know, learn, and build on the concept on the practice of human rights in different aspects. My main area of study was economic, social and cultural rights—these rights are understood in a complex manner. There is no single size that fits all. There is a lot of diversity. My study of human rights gave me a unique way to understand humanity. Not only the theoretical aspects. Human rights is the main area that I learned a lot about. With disabilities, I got a chance to build on what I know and what I face in my everyday life. So, for me, I can say it made me courageous. To study about HR uncovers the shameless, discrimination, and stigma that largely circulated in the community. Awareness plays a lot to improve the livelihood—persons with disabilities are marginalized. Those who discriminate aren't just the ordinary society. So-called scholars are also involved with this. In my view, first scholars should be objective and have a rational mind.* (Alumni A.2.20, awardee from Ethiopia who studied in the United Kingdom, focus group, February 20, 2023)

*My conception of all these concepts changed drastically. I didn't understand the concept of civil society. I knew what democracy is, but it really expanded as part of my studies. And not just [as] an idealistic system, but that it [democracy] is flawed.* (Alumni C.2.20, awardee from Turkmenistan who studied in the United States, focus group, February 20, 2023)

*My understanding of civil society was [that it was] just a bunch of NGOs that get donor funding and do whatever donors prioritize. I had no idea that civil society organizations can be constituency based and dependent on donations from their own constituents who believe in the cause of this organization. Because in Georgia, when NGOs were established, they had this purpose to get funding from international donor organizations, and they did not really have their own agenda. What they wanted to do. They just tailored their work according to the needs of this organization or the competition that was announced. In the United States, I [became] quite familiar with this civic movement and artistic activism that that is non-existent in my country still, and how people can get together and achieve real changes. And I could understand how powerful civil society can be.* (Alumni D.2.16, awardee from Georgia who studied in the United States, focus group, February 16, 2023)

*Understanding culture and social values too. Before and after my program, I think I changed a lot as a person due to my change in understanding of social values. In 2016—at that Royal University of Phnom Penh—we value hard work and put a lot of pressure on students. But then I spent 1 year in the U.K., exposed to the British culture, values and stuff. I changed—things that are unnecessarily*

*strict in their values—I returned to my teaching at the same university. I was changed as a teacher. The ways I work with students and the expectations that I have for students, and I focus on the outcomes. It is not as rigid as before—there are other values that you have to see. I think it has a huge influence on a change on myself and my value.* (Alumni C.2.17, awardee from Cambodia who studied in the United States, focus group, February 17, 2023)

*I was very fortunate to go to a place as diverse as [named host university in the U.S.]—exposure to different cultures and different ideas has made a really big impact. I have been more understanding of my own culture because I had the opportunity to step away. I had the chance to look at it from a different perspective. It's made me appreciate my culture a lot more. I come from a place where people generally take care of each other. The concept that you don't know who your neighbor is, that doesn't exist.* (Alumni B.2.17, awardee from Jordan who studied in the United States, focus group, February 17, 2023)

Finally, prior to reading the next interview excerpts, note that the following awardee uses language that is othering. As the bi-/multilingual awardee was participating in the interview in English, the evaluation team kept their direct quote:

*Disability rights changed my ways of thinking. I see it myself. I see it with my own eyes. In my classes, we have a friend who has a disability. Before that, in my country, everybody was blind to the rights of people with disabilities. The support and the ways the education system provided help was really eye opening for me. I never thought that a person with a disability would feel like a normal person. She didn't see herself as something. She talked to me in a normal way. That is what I had not expected from a person like her. I think about that. The other colleagues in my class also treat her in a normal way and that gave me a lot to think about in terms of what was happening back in my own country. The rights should be accommodated at the institutional level and the community level and the mindset and attitude towards people with disabilities—that is what we need to change.*

(Alumni B.2.20, awardee from Myanmar who studied in the United States, focus group, February 20, 2023)

The evidence that education can impact people's perspectives due to the introduction of new information is highlighted in the awardees' responses regarding their understanding of civil society, democracy, human rights, and disability rights. Respondents recognized that their changing perspectives that would not happen without an educational intervention that provided access to higher education and research. Only a few respondents shared that their concepts of these values had not changed.

# VII. DISCUSSION

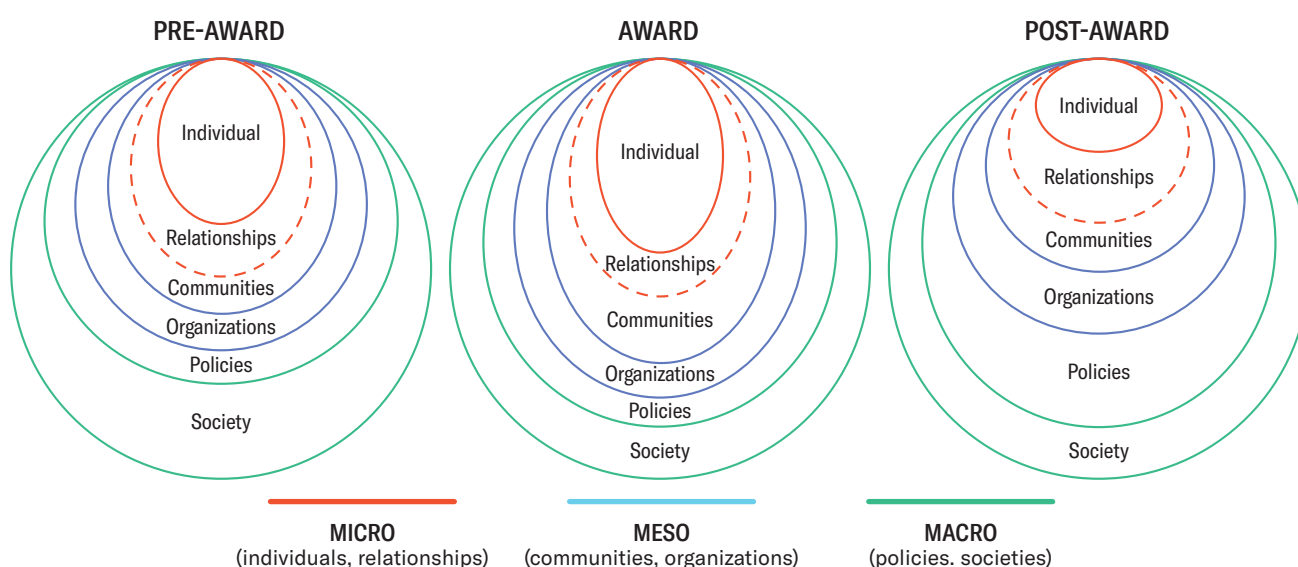
To organize the discussion section, we return to the socio-ecological model and examine the findings from each of the EQs by the different levels of impact (micro, meso, and macro) and pre-award, award, and post-award (Figure 9).

## VII.A. How did the Scholarship Programs facilitate greater access to education for its 20,000 awardees?

Open Society’s scholarships have made higher education and research access possible for thousands of individuals over the tenure of the programs. Their work to facilitate access for individuals around the globe who faced challenging political, economic, and security situations has arguably been unmatched in the higher education philanthropy space. The Scholarship Programs sought partner universities and funders who provided quality educational experiences in the social sciences and humanities which expanded theoretical and applied understandings of the inner workings of relationships, communities, organizations, policies, and societies. And through all of it, the Open Society Scholarship Programs staff were an ever-constant presence for the awardees. The Foundations’ work in the scholarship space is an exemplar of how access to higher education, and the “gains in knowledge and skills” can prepare individuals around the globe to work towards poverty reduction, health and wellbeing, gender equity and governance, economic growth, climate change, and peace and justice.<sup>76</sup>

The data and quotes shared throughout this evaluation report show the ways that the alumni of the scholarship and research programs are aiding in addressing these issues and more, on a daily basis. The information below outlines the different ways that the Scholarship Programs created greater access for awardees to education prior to, during, and following the receipt of an award.

**Figure 9.** An example of an awardee’s nestedness over time



## VII.A.1. Pre-award

Being able to change educational access to and within higher education began with the creation of a higher education awards unit. The Scholarship Programs was deeply invested in building the infrastructure and relationships to be a major presence in the higher education scholarship awards space. In many regions of the world, the Scholarship Programs' awardees were co-funded and the recruitment of awardees focused on thematic initiatives identified by George Soros, the Open Society Foundations' Board of Directors, and a network of higher education staff administering the scholarships. The Scholarship Programs diligently identified the priority areas for the awards and cultivated funding partnerships that allowed them to judiciously award funding over time. As a philanthropy, the Open Society Foundations were able to be flexible in their funding and often followed the emerging needs of countries and regions affected by governance changes and instability. This is seen in the investment in the former Balkan states in the 1990s and in Sudan, South Sudan, and Ethiopia starting in the 2010s. All this work led to an activated and energized network of universities and funding partners.

On the awardee side, the Open Society Scholarship Programs were intentional in the full spectrum of support offered to the awardees to make undergraduate and graduate degrees and research opportunities possible. Scholarship Programs staff worked hard to understand the educational backgrounds of the applicants and match them to institutions where they would be admitted into degree programs and faculties/ departments where their intellectual and applied interests aligned. The Scholarship Programs diligently sought to ensure that the awardees met the conditions for admittance and did so through the Summer School program to which they added an English language component to the program.<sup>77</sup> As mentioned previously, the Scholarship Programs also paid for English language testing and worked with partner institutions to waive application fees to make sure there were no barriers to applying. Staff members booked tickets, set-up the distribution of stipends, engaged with partner universities or funding partners, and provided pre-departure resources to the awardees. The close relationships between Scholarship Programs staff and host universities fostered a throughline for communication and possibilities for pre-arrival support for the awardees.

## VII.A.2. Award

The Scholarship Programs' awardees had deep support from staff during their time in the programs from Scholarship Programs staff. Staff worked across the full spectrum of the awardees' in-person experiences, including an annual site visit to meet with each awardee. During site visits, Scholarship Programs staff met with awardees and discussed academic, professional, and personal topics to ensure the holistic wellbeing of the participants. Site visits were an example of the ways that the Scholarship Programs served as an ongoing liaison between the student/scholar and the host institutions and other donors. If issues arose for an awardee, Scholarship Programs staff intervened and tried to navigate the issue. These staff members responded to any emerging needs of the awardees such as mental health issues or loss of a family member.

While not included in Section VI, respondents overwhelmingly named the program's staff as one of their three greatest supporters during their scholarship experiences. Respondents to this question named program staff by name and shared anecdotes such as, "[the program specialist] offered their logistic support and offered prompt responses when I reached out via email." Another survey respondent noted that, as one of their greatest supporters:

*[the program specialist] of OSF provided lots of support to the grantees including matters related to academic, logistics, and others. She was the one who actively provided the ongoing support throughout the Scholarship Programs. She provided strategic advice and support. She was approachable and supportive.*

The support with logistics from Scholarship Programs staff, and their physical presence during site visits, was noted by awardees as an important way that the Scholarship Programs staff made the higher education experience, whether degree programs or research, more accessible to awardees.

Throughout their programs, awardees had access to a full array of resources that enriched their time on the programs. From the specialized courses and classes that were relevant to the awardees' learning to the libraries and archives for faculty scholars, to the friends and cohort mates that morphed into long-term relationships for many of the awardees, the scope of what was available at the host institutions and through the Scholarship Programs enriched their experiences while on the program and beyond. Internships as part of degree programs were also mentioned by focus group participants, specifically in social work in the United States, public health in France, and law in the United Kingdom and Ireland. This experiential component of a handful of university programs brought together the classroom knowledge that was gained and how it provided a space for awardees to apply it in real time.

As evidenced in Section VI.C, the Scholarship Programs deepened and broadened awardees' understanding of core values and concepts that were fundamental to George Soros in his creation of the Foundations. Access to knowledge transformed awardees in relation to the societies in which they lived, where they were from, and where they might go to next.

### **VII.A.3. Post-award**

What does access look like post-scholarship experience? For example, Section VI.C.1 discussed the ways that awardees reported their economic wellbeing was better after the award and that they were stable or strong in the opportunities that they were able to provide for their families. The awardees saw themselves as change makers and agents of change in an ongoing capacity in their professional lives. Individuals in the focus groups/ interviews attributed being an Open Society scholarship awardee alumni as being the door opener to other opportunities that they received post-award. The evaluation team saw the post-award era as offering pathways of opportunities for the alumni; opportunities might range from new positions and continued education to broadening of networks that already existed, such as using new connections made by a scholarship alumna to create the Georgian social work network.

The relationships that some awardees formed with faculty mentors lasted beyond the end of their programs. An awardee from Myanmar who studied in the Philippines shared that they maintained contact:

*[w]ith the professor, yes, I have contact. Now I'm thinking about research so I have asked my professors to serve as referees who would love to support me. I posted my achievements and they responded always. Sometimes they contact me on Messenger, and I have frequent communication with them.* (Alumni 2.17, interview, February 17, 2023)

Additionally, some awardees reported that they collaborated on research grants or co-published articles with their faculty mentors. A few more awardees shared that faculty mentors had written letters of recommendation for graduate school or served as references for job applications. These relationships speak both to the awardees and also to the caliber of the universities that the Scholarship Programs selected as partner institutions.

Finally, the Scholarship Programs offered several post-award opportunities which extended access beyond the scope of the program. The opportunities included internships and alumni conferences. These program elements were not as focal for the alumni who took part in the focus groups and interviews and were not directly asked about as part of the survey.<sup>78</sup>

## VII.B. How did the Scholarship Programs inform higher education institutions' notions of "access" and how was that institutionalized?

Since EQ2 focused on the impact of being a host institution, this discussion primarily focuses on the meso-level, i.e., the impact of both the scholarship awardees on the institutions, as well as the broader impacts on the campus communities and organizations. Here, the meso-level focuses largely on the context of the higher education institutions and their broader community.

In terms of how the *pre-award* phase informed higher education institutions' notions of access, all of the universities needed to ensure some type of institutional buy-in to create and coordinate the Scholarship Programs logistics (though this varied among the institutions). Designated points of contact were developed (e.g., the Scholarship Programs had program managers who had partnership portfolios) for communication and administrative purposes. Finally, as noted in Section VI.B and VI.C, part of how the Scholarship Programs engaged in partnership development was through involving host universities in the different parts of the scholarship selection process, which fostered a sense of vested interest from higher education representatives. Pre-award engagement both fostered a vested interest in the Scholarship Programs, and impacted university representatives' own notions of access by becoming more familiar with different geographies and through engaging in the selection process itself.

As noted in Section VII.B, the *award* phase informed higher education institutions' notions of access more explicitly by creating a pathway for students that contributed to host universities in a variety of different ways. Scholarship Programs' awardees were often from geographies that the universities indicated they did not recruit heavily from, e.g., Central Asia, Afghanistan, and South Sudan, to name a few. Enrolling students who were from different geographies but also with practitioner experiences, meant that the awardees also contributed to enriching the perspectives and different voices in their classrooms. Finally, for some institutions being scholarship host universities resulted in significant and sustained program growth, as well as informing physical infrastructure renovations to be able to provide accommodations for students who had different physical disabilities (e.g., installing ramps for students who use wheelchairs and/or purchasing software that would allow students with visual impairments to have textual support).

Despite the (limited) ways in which being a host university expanded higher education institution representatives' notions of access, there was one area that was silent. Across all the survey respondents and interviewees, there was generally an absence of an articulated intention regarding scholarships supported by the Scholarship Programs. While the institutions were appreciative and valued being a host university, respondents did not indicate how their institutions might have considered more intentionally utilizing the Scholarship Programs within a broader strategy of diversifying their institutions. Regardless of this lack of articulated intentionality, the sustained engagement of higher education institutions to be host universities over a long span of time may be seen as a deep-seated commitment and/or as having a vested interest in the Scholarship Programs, which could be attributed to the programs' partnership cultivation approaches.

Finally, in the *post-award* phase, beyond the immediate impact of being a host institution through the students themselves, engaging with the Scholarship Programs had some longer-term impacts. For at least two higher education institutions (one North American and one European), programs that were created and sustained part through the cohorts of Scholarship Programs' awardees have enabled the higher education institutions to admit more students over time. For higher education institutions that had matriculated their students, they noted that if/when they were able keep in touch with their alumni, that also facilitated different opportunities like collaborative research, advocacy, etc. Finally, because of the Scholarship Programs' sustained focus on individual grant making and engagement in cultivating long lasting partnerships, this helped foster a commitment to being a host university and partner that demonstrate a longitudinal commitment.

***Enrolling students who were from different geographies but also with practitioner experiences, meant that the awardees also contributed to enriching the perspectives and different voices in their classrooms.***

## VII.C. What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility? Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?

Throughout Section VI, the evaluation team integrated the socio-ecological model to help organize the findings to show how the experience of an individual awardee (micro-level) permeated across into the work of the communities and organizations (meso-level), and in some instances, extended into the policy realm impacting awardees' societies (macro-level). This section provides an overview of who benefits when philanthropies commit to education and what would happen if they stopped allocating funds through the lens of the socio-ecological model.

### VII.C.1. Who benefits when philanthropies commit to education as an expression of their commitment to civil society building?

This section explores this sub-question by using the socio-ecological model as an organizing framework.

#### VII.C.1.a. Micro-level

The alumni respondents to the survey and focus groups/interviews expressed deep appreciation for being selected to be scholarship awardees. Alumni who finished the program were able to name an element, and often times multiple elements, that they took away from the program, and articulated how they profoundly shaped who they are or how they viewed the world. At the micro-level, the Scholarship Programs provided an advantage to awardees through the completion of a degree or research funding and through the awardees' affiliation with the Foundations, other funding partners, and their host universities. The personal growth that occurred through knowledge and learning was the inherent good gained by the individual awardees. The social capital generated in being associated with the scholarship and a prestigious institution of higher learning was an additional gain. Below is an example of an awardee's reflections on the growth and learning that their scholarship provided:

*It is an enriching experience that I could not find elsewhere! The scholarship per se is really generous compared to other scholarships! It also offers a very strong support mechanism, financially and beyond! On top of that, it offers a way and means for me to be able to grow professionally, personally and socially.* (Awardee from Cambodia who studied in Turkey, survey)

The Open Society Scholarship Programs' focus on social sciences and the humanities uniquely positioned individuals to engage in critical thinking that fostered curiosity and question asking, which in turn encouraged awardees to see themselves and their home country contexts in new and different ways. Alumni C.2.20, the focus group participant



who shared that they knew of democracy but saw it as a political panacea, came to realize that democracy itself is flawed and requires ongoing nurture and critique to improve it. At the micro-level, individuals were provided the opportunity through the Scholarship Programs to step into conversations about civil society building, and all the associated concepts around it, and exercise their agency regarding if and how they wished to engage. This is a concrete illustration of the Scholarship Programs' theory of change, i.e., providing people greater access to educational opportunities will expose them to different ideas and will have the longer-term impact of contributing to the building of civil society globally.<sup>79</sup>

### **VII.C.1.b. Meso-level**

The host universities were active at the meso-level as sites and spaces of exploration, learning, and questioning for awardees, in relationship with university professors, staff, and peers. Universities sit in a unique space at the meso-level in that they work with individuals (which are nested in the micro-level) and are based at the community level. If the individual awardee is a scholarship awardee at the micro-level, the universities were the beneficiaries at the meso-level. Universities diversified, or further diversified, their student bodies through partnering with the Open Society Scholarship Programs. This diversity added to the viewpoints and lived experiences present in university classrooms, which in turn expanded what could be discussed, explored, and called into question. As noted in the findings section, an institutional representative interviewee stated, "I would say our Open Society Foundation scholars, by and large, were probably [sic] better students. I mean, they tended to come with experience[s] of their own, and certainly [with] different experiences from our traditional profile of a law student."

At the meso-level, the Scholarship Programs and its funding partners were able to co-commit to longitudinal change in specific regions and in response to country-level events. In this way, the Scholarship Programs was unique in that they had access to countries in which other branches of the Open Society Foundations were banned. For example, governments were often amenable to having students and scholars selected from their country to receive funding to study law or human rights, whereas they would not have been open to the Open Society Foundations going in with an advocacy campaign for human rights or a court case.<sup>80</sup> The Scholarship Programs' fluid evaluation practices did not enable them to systematically track change over time. However, the Scholarship Programs' funded scholarships, and accompanying program dates and internal memos, demonstrated the intent for ongoing, broad funding, as well as targeted funding which addressed a particular issue in the moment. Examples of this would be the Civil Society Leadership Award (2014–2023) and the Arab Women's Professional Program (2011–2014).

As noted in Section VI, 92 percent of participants who responded to the survey were active in a civil society group. For some awardees, that community-level dedication came in the form of creating a civil society organization. An awardee from South Sudan who studied in the United States noted in their survey, "I formed and registered a civil society-based organization called Centre for Legal Aid in South Sudan. The aim of this organization is to help vulnerable people whose rights have been violated to access justice. However, limited resources remain a challenge."

Awardees also held jobs and positions across a broad section of employment types. Without corroborating data from the side of the organizations and institutions, it is difficult to ascertain if and/or how these organizations and institutions were beneficiaries of the scholarship. However, based on the self-reported data in the survey, and the qualitative focus group data on their roles as change agents, there are communities and organizations that have active and devoted staff and volunteers with ongoing dedication to their issues and causes.

### VII.C.1.c. Macro-level

Open Society Foundations, with its broad scholarship alumni base of 20,000 award recipients, has a diffuse network of people working on civil society issues including, and most prominently, democracy and human rights. At a policy level, numerous Scholarship Programs alumni work in government or international non-governmental organizations. For those working at multilateral organizations, this type of policy making often spreads across nation-state boundaries. Both national and multilateral organizations' policies have the long-term potential to effect societal change. For example, below is an excerpt from an Ethiopian awardee who studied in Ireland. They explained about the impact of their work on policy regarding internal displacement for the Ministry of Justice in Ethiopia:

*After the scholarship, I directly returned to my home country to serve within the Ministry of Justice in Ethiopia. So, I positively impacted the development of policy and the legal framework in Ethiopia. It's basically on issues of internal displacement. I coordinated a technical team mandated, or tasked with, the responsibility to draft a comprehensive and legal framework to address the problem of internal displacement in Ethiopia. So, having had that role I positively impacted, and I've been participating in the policy and policy dialogue... (Alumni C.2.16, focus group, February 16, 2023)*

*My job was very policy-level work. Shortly after I returned, I started working for the UN. I know there are certain things that I had witnessed that we really pushed in the gender agenda because I worked for the UN and women in the gender agenda that were adopted. After a lot of fights, and a lot of sleepless nights, we saw [things] being adopted by Member States and going into policies within the countries. I was able to really push to make a difference. But oh, it's not to the level that you know you would be content with. But I think we will never be content, especially those of us who are rooted in social work and are really interested in and passionate about that work. (Alumni 2.16, focus group, February 16, 2023)*

At the societal level, scholarship alumni are contributing to new fields of study and vocation, such as social work in Azerbaijan, Georgia, and Armenia. One Georgian alumni, who is active in the field of social work in their country, took part in the survey. Their response below to survey questions demonstrates the transitions across the ecological model from them as an individual, to the work that they are doing within Georgian society as the founder of the Georgian Association of Social Workers and the Academic Programs of Social Work in Georgia.

*This scholarship was unique as [it] gave me a chance to become a pioneer social worker in Georgia and chance to contribute to social work history making in Georgia. Definitely all doors were open to me. At the age of 23, [I] was one of the youngest graduates of the Scholarship Programs. [I had] great job opportunities and a great network locally. At [least] 2–3 persons [per year] were given that chance from Georgia and we are now a very strong professional network in Georgia and also lifelong friends. [I have] international networks and friends all over the world. It gave me an ability to be a change agent in my country and I am still working and enjoying this role and always will. I am founder of Georgian Association of Social Workers and worked with colleagues to found the Academic Programs of Social Work in Georgia. I've been an acting vice president of IFSW, Europe and I'm a member of many local, regional, and international professional networks in social field.*

(Awardee from Georgia who studied in the United States, survey)

At the macro-level, there is a diffuse number of alumni around the world who are active in policy-level and societal change rooted in the values of the Open Society Foundations centering those four core notions including democracy and civil society.

### **VII.C.2. What would happen if philanthropies such as the Open Society Foundations or others like the Mastercard Foundation stopped allocating money to facilitate student and scholar mobility?**

From one vantage point, the work of Open Society Scholarship Programs is similar to the work of other education-focused organizations like the Institute of International Education, IREX, and/or American Councils for International Education in terms of administering scholarships for and with funders like the U.S. State Department. However, for the evaluation team, the diversity of the Scholarship Programs' partnerships constituted a critical difference from these other organizations. Because the Open Society Scholarship Programs had developed and maintained an ecosystem of partners (various government-affiliated education funders, national foundations, education advising centers, NGOs, and universities) over the course of more than three decades of work, this created several key strategic tools or approaches for the Scholarship Programs. First, scholarship programming was driven and informed by the needs and priorities of the national foundations and not predetermined by the Open Society Scholarship Programs.<sup>81</sup> This allowed local partners to identify what knowledge gaps needed to be filled in their communities.

Second, having various funding partners allowed the Scholarship Programs to work with partners to ascertain which ones would be the most effective in different contexts. For example, if there were bilateral tensions between two countries, the Scholarship Programs could explore opportunities with different cost-share network partners and maintain scholarship engagement, allowing for greater stability in terms of facilitating opportunities for potential awardees from those countries. Without philanthropies facilitating this process, state and government-affiliated organizations (Campus France or the German Academic Exchange Service) would become the primary drivers of any international education initiatives.<sup>82</sup> Yet, such organizations inherently reflect the soft power and foreign policy priorities of their respective governments against a historical backdrop of colonialism and expansionism. Without philanthropic conveners, this also means

that there are limits of where scholarships may be awarded depending on the bilateral relationships between different countries. As noted by different awardees, without the Scholarship Programs, scholarship access pathways will become significantly more limited in their countries. Going back to the idea of *concentrated diffusion*, this means that in some countries, it would be challenging to create concentrated groups of experts who would be able then to inform change across different sectors, because of the loss of the Scholarship Programs.

Moreover, state and government funding priorities are also inherently tied to election cycles and those who are in power. This means that the long-term, consistent commitment to generational capacity building is essentially impossible without organizations engaging in networked individual grant making. Long-term change requires long-term investment. Dismantling systems and structures of colonialism or other oppressive/repressive regimes also takes time. Yet, initiatives like scholarship programs are subject to the priorities of a particular political regime, which then has the possible change from one election cycle to another.<sup>83</sup> Finally, without philanthropies engaging in this space, this limits the types of thought leaders in the higher education institution space.

Finally, a few cross-cutting notes. First, although EQ2 was focused on how institutions' notions of access were informed through this partnership, the findings and discussion are limited by its small sample which singularly represented higher education institutions. Moreover, there were no respondents from network partners like Campus France or the German Academic Exchange Service. That does mean that the discussion about partner institutions is limited to our understanding of the host university experience. Second, universities are situated within particular higher education traditions, which means there are different institutional understandings of issues of access, enrollment processes, organizational and administrative structures, and institutional governance. This type of diversity also makes it inherently challenging to compare impact across the different higher education institutions. Relatedly, this also meant that institutional interest in facilitating co-curricular activities varied across institutions, which was reflected in interviewees greater or lesser interest in the life and work of scholarship awardees outside the classroom during their programs.

# VIII. RECOMMENDATIONS

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Building on the observations and findings from this evaluation, the University of Wisconsin–Madison evaluation team provides the following five recommendations for the Reassigned Grant Unit’s consideration.

**Recommendation 1:** As a philanthropy, the Open Society Foundations should continue to be a thought leader in the higher education and philanthropy space.

As noted in Section I, this evaluation had certain time constraints. However, the evaluation team noted that the availability of rich memos, data sets, and other scholarship-related documents and artifacts, is an opportunity to develop a number of white papers on individual grant making. Other research-practice outputs could include: critical case studies examining the impact of the Scholarship Programs within countries or communities; examining budget narratives to better understand what the return on investment over time has been (by country, region, field, etc.); individual case studies on a select group of awardees; and/or an institutional ethnography of the scholarships work within the Open Society Foundations.<sup>84</sup> As the impact of scholarships in contributing to the field of international education is of growing interest to both scholars and practitioners, further research and evaluations of the Foundations’ work could enrich this body of work.

**Recommendation 2:** Create monitoring, evaluation and learning frameworks for grant making work that will continue within the Open Society Foundations. As noted in the first recommendation, there is a rich set of historical documents related to the Open Society Scholarship Programs because of the longevity of its work. However, looking across different documents—Board of Directors meeting notes, budget narratives, annual reports, memos, and program reviews—there is clear evidence that the Scholarship Programs team was engaging in regular, informal formative evaluation. *Formative evaluation* is evaluation that is ongoing and intended for program improvement for ongoing work. However, the reporting documents varied from year-to-year, making it challenging to track change over time. Creating frameworks for the Open Society Foundations or within types of programs would allow for longer-term tracking and evaluation. The documents and data compiled and collected as part of this evaluation project may be used for additional investigations.

**Recommendation 3:** If the Open Society national foundations continue to engage in more limited individual grant making, the Open Society Foundations should maintain a lean, centralized staff to provide coordination and partnership cultivation support across the Foundations.

While understanding the importance of empowering national foundations to ascertain their own needs and priorities, having each of the national foundations negotiating and coordinating scholarships within different higher education initiatives creates a great deal of redundancy and diffuses partnership networks. If the Open Society Foundations *writ large* maintain some engagement in individual grant making, maintaining

a lean centralized staff to provide coordination (i.e., negotiating contracts, partnership cultivation, and facilitating the monitoring, evaluation, and learning process) would build on existing partnerships by ensuring consistency and efficiency.

**Recommendation 4:** Develop (or strengthen) alumni networks and support through national foundations.

Through the different alumni interviews and focus groups, one request that emerged from the evaluation participants was building stronger alumni networks within countries. Although there are some countries and regions where alumni networks seem to be active, in general, it seemed that this varied from country to country. Encouraging national foundations to create and/or activate alumni networks would help foster and sustain levels of concentrated diffusion in-country by creating communities of practice among those who have a shared lived experience and help foster potential new scholarship pathways for future students and emerging leaders.<sup>85</sup> Continuing to invest and support program alumni is one way of continuing to support long-term, macro-level change.

Relatedly, another form of support for scholarship programs alumni could be through start-up funds or seed grants for awardees who are working on research-practice (or applied research) projects within their communities or through community-focused projects.<sup>86</sup> Not only would such opportunities enable scholarship alumni to engage in locally-relevant work, it would or could maintain the relationships awardees have formed with other scholarship recipients, cohort-mates and/or program faculty.

**Recommendation 5:** Allocate funds to facilitate partnerships between higher education initiatives to create an ecosystem of relationships and engagement.

As the Open Society Foundations shift from individual grantmaking to focusing on the Open Society University Network, institutional respondents noted that while they are longtime partners with the Scholarship Programs, they have been unable to become members of the Open Society University Network. In addition to establishing this network, allocating funds to foster partnerships that are identified by national foundations (i.e., higher education institutions within their countries) and/or legacy or other host universities would build on the relational networks that have been formed over more than three decades of work.

# IX. CONCLUSION

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George Soros’s concern about the unwillingness of liberal democracies to engage in capacity building and strengthening democratic systems remains true today. If anything, what the last 33 years have illustrated is that political winds can change as demonstrated by the dissolution of the Soviet Union, the optimistic neoliberal hope of the “death of the nation-state” in the 1990s, the re-emergence of authoritarianism, and the sociopolitical assemblage of illiberal states (Applebaum, 2021).

In his 2017 essay in *The Atlantic*, Soros wrote:

If there is any lesson to be learned, it is that the collapse of a repressive regime does not automatically lead to the establishment of an open society. An open society is not merely the absence of government intervention and oppression. It is a complicated, sophisticated structure, and deliberate effort is required to bring it into existence. Since it is more sophisticated than the system it replaces, a speedy transition requires outside assistance. But the combination of laissez-faire ideas, social Darwinism, and geopolitical realism that prevailed in the United States and the United Kingdom stood in the way of any hope for an open society in Russia. If the leaders of these countries had had a different view of the world, they could have established firm foundations for a global open society. (para. 34)

Recent events only further reinforce Soros’s observations from 2017. It follows then, that engagement from actors that do not strictly have a politically motivated ideological agenda is critical in advocating for values and visions that require focus beyond the next election cycle. This is particularly true as Henry Giroux (2019) observes that “We live at a time in which institutions that were meant to limit human suffering and misfortune and protect the public from the excesses of the market have either been weakened or abolished” (p. 27).<sup>87</sup>

The change that Soros intended to accomplish through individual grant making (and by extension, the work of the Scholarship Programs) is illustrated through the lives of many of the alumni. To avoid being repetitive, this report will conclude with a frequently observed comment from survey respondents and focus/group interviewees.

Alumni evaluation participants expressed “hope beyond hope” that the Open Society Foundations would consider re-establishing some higher education individual grant making to sustain the work that has been going on for more than three decades. The comments of a Cambodian alumni who studied in Hong Kong reflect the sentiments of many of the alumni who contributed to this evaluation:

*It is very sad to see that the program is coming to a close. I wish that it would still go on in a certain form. Personally, I see it as one of the great opportunities to help certain groups of people and in the larger society to develop. Now that it is gone, it is a loss for the country and for the region. It could come back in a different form and scale. It is still useful—we don't want it for ourselves, but it will be crucial for the younger generations' development. [They also need] the network that I have built, the opportunities that I have had.* (Alumni D.2.2, focus group, February 2, 2023)

It is strongly hoped the findings and insights from this evaluation report will move the Open Society Foundations' leadership to reconsider individual grant making as a way of providing access to higher education opportunities within the broader aim of building civil societies globally. The information and recommendations presented in this report seek to build on the incredible work that has been carried out so far by the Open Society Scholarship Programs and hopes to strengthen the Foundations' work in this space moving forward.



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# ENDNOTES

- 1 Later this would become part of the World Bank.
- 2 See Soros, 2009, p. 2
- 3 Ibid
- 4 See Soros (2011)
- 5 See Soros (2016)
- 6 See Scholarship Programs, n.d., internal document
- 7 See Open Society Foundations Request for Proposals, 2020, internal document
- 8 See Lewin (2015)
- 9 Ibid
- 10 Post-tertiary is included here due to the Open Society Foundations scholarships specifically focused on faculty and researchers.
- 11 See CSLA Selection Criteria, 2016–2017, internal document. Note: criteria for civil society leaders or changemakers also includes being a *multiplier*, i.e., “the applicant will share the benefits of the experience upon return” (Network Scholarship Programs’ Doctoral Fellows Program, n.d., internal document).
- 12 It is noteworthy that in all his writings and interviews regarding the open society, Soros uses the definite article “the” versus “an” open society. His interpretation and application of Popper seems to be that there is one diverse, complex society that shares different democratic values and within that singular vision, therein lies multitudes.
- 13 Soros, 2017, para. 18; see Peterson, 2018
- 14 Soros, 2018, para. 16
- 15 Collins Dictionary’s definition of civil society.
- 16 See Morariu (2012)
- 17 Ibid, p. 1
- 18 See Frierson et al. (2002)
- 19 In terms of response rates, the institutional survey elicited a 24 percent response rate, and the awardee survey elicited a 13.7 percent response rate.
- 20 Information for this section was drawn from various Foundations’ internal documents and websites.
- 21 See Scholarship Programs Coordinators Manual [Draft], November 2011, internal document
- 22 Ibid; Karen J. Greenberg (1994, August 31), email, internal document.
- 23 See Loerke, Regional Scholarship Programs Report for the Open Society Institute Board, June 6, 1997, internal document
- 24 See Loerke, 1995, personal correspondence, internal document
- 25 See Brogden, 2018, p. 132
- 26 See Loerke, Regional Scholarship Programs Report for the Open Society Institute Board, June 6, 1997, internal document
- 27 Ibid; an email from Martha Loerke (1995, December 7) had previously outlined the staffing structure for regional scholarships programs, as well as a scholarships office at the Central European University.
- 28 Loerke, April 28, 2023, personal communication; Istvan Rev to George Soros (1995, December 14), fax, internal document
- 29 See Loerke, March 10, 1998, email correspondence regarding five-year plan, internal document
- 30 Central European University was originally established in three cities (Prague, Warsaw, and Budapest) in 1991, then was consolidated into the single campus in Budapest in 1995. See <https://www.ceu.edu/about/>
- 31 The Foundations was and is engaged in a great deal of other activities as noted in Sudetic (2011) and Soros (2011). And as Soskis (2017) reported, the Open Society Foundations have given away “some \$14 billion over the last three decades... and operate in more than 100 countries around the world” (para. 10). This evaluation report focuses on the activities that are relevant to the work of individual grantmaking.

- 32 Loerke, April 28, 2023, personal communication
- 33 See Soros (2011)
- 34 The larger organizational shifts in 2013 and 2020 corresponded to Soros's decision to move from a philanthropy to a legacy philanthropy and the need to consider long-term sustainability, etc.
- 35 Consortium for Academic Programs, 1994, budget document, internal document
- 36 Brogden (2018) is an excellent resource for additional information on the history of scholarships and partnerships over time.
- 37 Sources included: Scholarship Programs narrative documents, memos, personal communication with Open Society Scholarship Programs and Reassigned Grants Unit staff
- 38 See Soskis, 2017, para. 16
- 39 Although there was ongoing discussion regarding whether the Scholarship Program's focus should be on geographies or individuals, the Scholarship Programs' focus seems to have remained primarily geography driven throughout its history. For example, Loerke (2016, internal document) posited "Is geography alone sufficient for driving IG [individual grantmaking] strategy?" "What is the profile we seek, how are we reflecting a theory of change in our selection targets?").
- 40 As cited in Brogden (2018)
- 41 See *ScholarForum*, 1999, p.2
- 42 See *ScholarForum*, Fall 2001, p. 2
- 43 See *ScholarForum*, 2010, p. 2
- 44 See *ScholarForum*, 2016, p. 2
- 45 The review excluded the years: 1998, 2002, 2005, and 2006.
- 46 Brofenbrenner (1977) defined the ecology of human development as "the scientific study of the progression, mutual accommodation, throughout the life-span, between a growing human organism and the changing immediate environments in which lives, as this process is affected by relations obtaining within and between these immediate settings, as well as, the larger social contexts, both formal and informal, in which the settings are embedded" (p. 514).
- 47 See Brofenbrenner, 1977, pp. 514–515
- 48 See Mawer (2018)
- 49 Ibid, p. 258
- 50 Ibid, pp. 274–275
- 51 See University of Minnesota Center for Leadership Education, n.d.
- 52 See Frierson et al. (2002)
- 53 While the evaluation team would have liked to expand the evaluation to include a broader group of stakeholders, e.g., representatives from government-funded sponsors like the German Academic Exchange Service, Centre National des Oeuvres Universitaires et Scolaires, and/or the United States Agency for International Development, due to time constraints, the decision was agreed upon with the Reassigned Grants Unit to focus the current evaluation to awardees and host institutions.
- 54 Also included on the invitation to participate were representatives from other partner organizations like the German Academic Exchange Service, etc. However, the respondents were all from host universities and for the sake of clarity, this survey will be identified as the host university or institutional survey versus the alumni survey.
- 55 See Griner Hill & Betz (2005); EvaluATE (2015)
- 56 Note: While there was one survey instrument designed to elicit awardee perspectives, two versions were created. The main difference between the two versions was the mention of the Open Society Foundations in the introduction and throughout the survey. Recognizing that being affiliated with the Open Society Foundations might result in potential safety and security issues, one version of the survey had the majority of references to the Foundations from the introduction and throughout the survey removed.
- 57 Awardees from fragile countries who indicated their interest in participating in a focus group were given the opportunity to do an interview instead.

- 58 The assignment of “Alumni A.2.20” was not intended to erase the humanity of the participants; rather, it was done to protect anonymity and to not assign actual names that would have imposed different aspects of identity that were not chosen by the participants (Saunders et al., 2015). Additionally, respondents did not select their own pronouns for use in the report. For this reason, when referring to the survey and focus group respondents, third-person plural pronouns have been used instead of third-person singular pronouns. For example, “they” is used of “he,” and “their” is used for “her.”
- 59 See Saldaña (2009)
- 60 See Loerke, April 28, 2023, personal communication
- 61 “Last dollar in” funding is a term used in enrollment management to refer to funding that serves to “top off” student financial assistance. The funding is applied after “first dollar in” funds are applied and thus, may vary from student-to-student.
- 62 Campbell also carried out a program review by interviewing 12 awardees who completed the Scholarship Programs’ Summer School program (see Campbell (2019), 2017 Summer School program review, internal document).
- 63 See Campbell & Basi, 2022, p. 19
- 64 Ibid, p. 20
- 65 Ibid, p. 25
- 66 Ibid, p. 26
- 67 Annual Report to Open Society Institute–Belarus, 2004, internal document
- 68 Interestingly, this person also shared that they mainly were in contact with friends whom they had made through their scholarship cohort in Thailand and Laos and not from their Burmese cohort.
- 69 Because there was a small sample of institutional interviewees, identifying information has not been included here but more detail can be found in the transcripts.
- 70 Note: 84 percent of the respondents indicated that their institutions had 2,000+ international students enrolled, and 80 percent indicated that their institutions administered or admitted recipients of other scholarships like CSLA. Some examples included Fulbright, U.K. Foreign and Commonwealth Office, Irish Aid, the German Academic Exchange Service, U.K. Chevening, and the Mastercard Foundation. More generally, 12 of the university survey respondents had a total student population of 15,000 or more.
- 71 Given polarizing political discourses regarding asylum seeking in the United States and Europe, it is conceivable that higher education institutions with students who come to enroll in graduate programs then apply for asylum may receive more public and political scrutiny due to politically motivated backlashes. However, given that students have personal autonomy to determine what is best for themselves and their dependents, it would seem that this is outside the purview of university administrators to decide.
- 72 See Griner Hill & Betz (2005) and EvaluATE (2015)
- 73 For those who reported weak, there was no consistency in employment. The largest country representation in this category was Ethiopia (n=6), followed by individuals or two people from the same country (South Sudan (n=2), Myanmar (n=2), and DRC (n=2).
- 74 For those that shared opportunities to provide for themselves and their dependents were weak, the countries that had more than five responses included those living in Azerbaijan (n=5), Egypt (n=6), Ethiopia (n=10), Myanmar (n=5), and South Sudan (n=5).
- 75 The data from the previous section is also applicable here. If philanthropies such as the Open Society Foundations or Mastercard Foundation stopped allocating money, whether or not the individuals who would be eligible for these awards would be employed at the level they are, feel like they are changes agents, and are actively involved in civil society outside of work and home life are somewhat unknown. However, the awardees’ responses regarding pre- and post-economic wellbeing does provide evidence that the alumni felt like their economic wellbeing was stronger after completing the program.
- 76 See Lewis, 2015, pp. 37–38
- 77 See Campbell & Basi (2022)
- 78 See Brogden (2018) for additional details about the post-award experiences of alumni
- 79 Ibid; Loerke (1996)
- 80 Loerke, April 28, 2023, personal communication

- 81 As noted by Aryeh Neier (2011), the Open Society Foundations were, and remain, a significantly decentralized organization in that national foundations (thus, the name “Open Society Foundations”) are given a great deal of autonomy to ascertain and advocate for local needs (in comparison to other philanthropies).
- 82 To a certain extent, these challenges may be more salient for organizations like the Institute of International Education IREX, which are largely identified with the U.S. State Department.
- 83 Soskis (2017) notes that more scrutiny should be given to philanthropy because of how much power they wield, “[e]ven if philanthropic bogeymen are not real, there still might be good reasons to fear the dangers they actually pose.” Alternatively, there are gaps that nation-states cannot sustain over a long course of time due to the inherent shifting nature of politics and political favor where philanthropies can maintain a more long-term focus based on organizational values, mission, or commitments.
- 84 Because this evaluation was focused on the impact on scholarship awardees, a number of stakeholder groups were not interviewed for this work. This includes key members of the Open Society Foundations’ leadership, as well as the Open Society Scholarship Programs team. However, to understand the history and individual grantmaking more comprehensively, these stakeholder groups (and others) could and should be identified and included.
- 85 The Council for Advancement and Support of Education is a professional organization focusing on professional development around alumni engagement (<https://www.case.org/>).
- 86 More about research-practice partnerships can be found here <https://rpp.wtgrantfoundation.org/>. Other examples of similar programs include the Mandela Washington Fellowship (<https://yali.state.gov/>), the Community Solutions Program (<https://www.irex.org/project/community-solutions>), and/or the Fulbright alumni grants.
- 87 Tierney (2021) discussed the ways in which the neoliberal enterprise, incentives within higher education, and higher education’s democratic imperative are intersecting, changing, and require reflection and reform.

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## APPENDIX A: PROJECT TEAM

**Elise S. Ahn, PhD**, is the Founding Director of the International Projects Office (IPO) at the University of Wisconsin–Madison. Since joining the International Division and IPO in December 2016, Elise’s main role is to work with the IPO team to help develop and administer internationally focused, multidisciplinary, capacity-building, and systems strengthening projects in collaboration with other campus units. Before coming to Madison, Ahn worked at KIMEP University (Almaty, Kazakhstan) as an assistant professor and the director of a master’s degree program in Teaching English to Speakers of Other Languages. She received her PhD from the University of Illinois at Urbana-Champaign in Educational Policy Studies.

**Lesley Bartlett, PhD**, is a professor in and Chair of the Department of Educational Policy Studies at UW-Madison. She is also affiliated with Anthropology; Curriculum and Instruction; and Latin American, Caribbean, and Iberian Studies (LACIS). An anthropologist by training who works in the field of International and Comparative Education, Bartlett does research in literacy studies (including multilingual literacies), migration, and educator professional development. She currently co-edits the *Anthropology and Education Quarterly* with her colleague, Professor Stacey Lee.

**Alexis Bushnell, PhD**, has a PhD in International Human Rights Law and an LLM in U.N. Peace Support Operations and Humanitarian Law. Her research is socio-legal, focused on intersections of refugee law, human rights law and humanitarian law, including whistleblowing, as well as issues of refugee camps, detention, humanitarian governance and mass atrocities. She is currently a Senior International Fellow at the Government Accountability Project, and a U.K. Arts and Humanities Research Council Foreign Commonwealth & Commonwealth Office Humanitarian Protection Fellow, focusing on sexual violence in the Syrian conflict.

**Diana Chioma Famakinwa, PhD**, is an educator, researcher, and higher education professional with experience in teaching, conducting qualitative and mixed-methods research, and supporting international education partnerships and projects in non-profit and university settings. She holds a PhD and MA in Educational Policy Studies from the University of Wisconsin–Madison School of Education. Her research interests center on African diaspora studies and international higher education. Famakinwa has experience living and conducting ethnographic research in Nigeria and is also a Fulbright-Hays program alumna. To learn more about her research and consulting services, visit [dcfamakinwa.com](http://dcfamakinwa.com).

**Tenah Hunt, PhD**, is an evaluator and researcher who is passionate about using mixed-method, strengths-based, and culturally responsive practices to improve educational, health, and economic opportunities for traditionally marginalized communities. Hunt earned her PhD. in Social Welfare from the University of Wisconsin–Madison and holds a master’s degree in public health with an emphasis on health behavior and health education from the University of Michigan.



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**Kate McCleary, PhD**, is the Associate Dean of High Impact Practices in the University of Wisconsin–Madison International Division. Previously, she was the Associate Director of the Global Engagement Office (GEO) in the University of Wisconsin–Madison’s School of Education. McCleary is a practitioner-scholar who does work on internationalization of higher education, intercultural learning, and evaluation. As the day-to-day staff manager of the GEO, she oversaw and orchestrated key initiatives pertaining to international students and scholars, study abroad, bringing a global lens to coursework and programming, and international partnerships, and also served on the School of Education’s Global Education and Equity, Diversity and Inclusion Committees. She received her PhD in Educational Leadership and Policy Administration from the University of Minnesota with a concentration in comparative international development education.

## APPENDIX B: PROJECT TIMELINE

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| <b>Dates</b>                 | <b>Description</b>  |
|------------------------------|---|
| <b>September 19, 2021</b>    | Initial brainstorming about the evaluation project  |
| <b>October 19, 2021</b>      | Initiation of the contract process  |
| <b>November 3, 2021</b>      | Initial document transfer   |
| <b>April 7, 2022</b>         | Agreement signed/countersigned  |
| <b>October 19, 2022</b>      | Discussion regarding evaluation collection processes  |
| <b>November 2, 2022</b>      |   |
| <b>November 18, 2022</b>     | Institutional survey distributed  |
| <b>January 11, 2023</b>      | UW evaluation team sends OSF RGU aggregated survey data (host institution, both awardee survey responses) |
| <b>January–February 2023</b> | Awardee focus groups and interviews; host university interviews   |
| <b>March 23, 2023</b>        | Amendment to extend evaluation timeline effective   |
| <b>April–May 2023</b>        | Evaluation report write-up and submission   |

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