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# STAGES OF IMPLEMENTING A USAID SCHOLARSHIP ACTIVITY: PLACING STUDENTS AT THE CENTER

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## CENTER FOR EDUCATION EVIDENCE REPORT



Higher Education Scholarship Toolkit

OCTOBER 2021

## **PREPARED BY**

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# I. INTRODUCTION

USAID higher education scholarship activities are dynamic and challenging. There are many components and considerations to successfully implement a scholarship activity, from preparing students to start classes, to completing degrees, measuring impact, and alumni engagement! In addition, higher education scholarship activities work with multiple partners and cultures, leading to dynamic exchanges of all types.

## What is the Purpose of this Document?

This document explains the six stages that comprise the implementation of a USAID higher education scholarship activity. To do this, it incorporates successful models and lessons from many USAID and other donor-funded higher education scholarship programming.

This resource also attempts to address one longstanding challenge in scholarship programming: activities are not always designed with the student at the center. To address this challenge and align with the principles and priorities of the 2018 USAID Education Policy,<sup>1</sup> this document highlights the specific perspectives of both participating students and the managers and partners who implement the activity. This approach emphasizes that despite different priorities at each stage, the implementing partner(s) and students are working together to achieve the same goals. Both groups are important parts of a team that works together to achieve activity success.

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### Why should students be at the center of scholarship activity design, management, and implementation?

In most scholarship activities designed to reach development goals, administrators and students work together to achieve the scholarship activity goals.

However, the real impact comes in terms of what the students accomplish after their graduation and the extent to which they tie these successes to their scholarship experience. In other words, students are at the center of the scholarship activity's success.

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<sup>1</sup> USAID. Education policy. "USAID Education Policy," (2018).  
[https://www.usaid.gov/sites/default/files/documents/1865/2018\\_Education\\_Policy\\_FINAL\\_WEB.pdf](https://www.usaid.gov/sites/default/files/documents/1865/2018_Education_Policy_FINAL_WEB.pdf)

## 2. WHAT ARE THE SIX STAGES OF A SCHOLARSHIP ACTIVITY?

The six stages of a scholarship activity are presented in Figure 1. Each stage connects to the next and is often planned around the academic calendar in order to meet target dates such as application deadlines, first day of classes, or graduation. Moreover, the idea is that a group of students, or a cohort, will go through all stages of the activity together. These stages are relevant for scholarship activities that take place in the partner country, in the United States, or that are based in a third country. In any given USAID higher education scholarship activity, these stages will likely repeat, with overlapping processes and opportunities for learning, adaptation, and innovation happening annually over the life of the activity.

FIGURE 1. Stages of a Scholarship Activity



### NOTES ON THE STAGES

- These stages may differ by specific activity, so there may be other customized stages to consider for your activity, such as a required internship.
- The amount of time or amount of administrative effort needed to accomplish each stage is not the same.
- These stages may align with the activity logic model to achieve the goals intended for the program. [Additional information on logic models](#) is available.<sup>2</sup>
- Activity [monitoring, evaluation, and learning \(MEL\)](#)<sup>3</sup> should be incorporated across all of the implementation stages. Additional guidance on MEL in scholarship activities is available at [Guidance on Monitoring, Evaluation, and Learning \(MEL\) in USAID Scholarship Activities](#).
- Effective communication among administrators (managers, implementing partners, and higher education institutions) and with students—with all sides listening and asking questions—is important for positive outcomes.

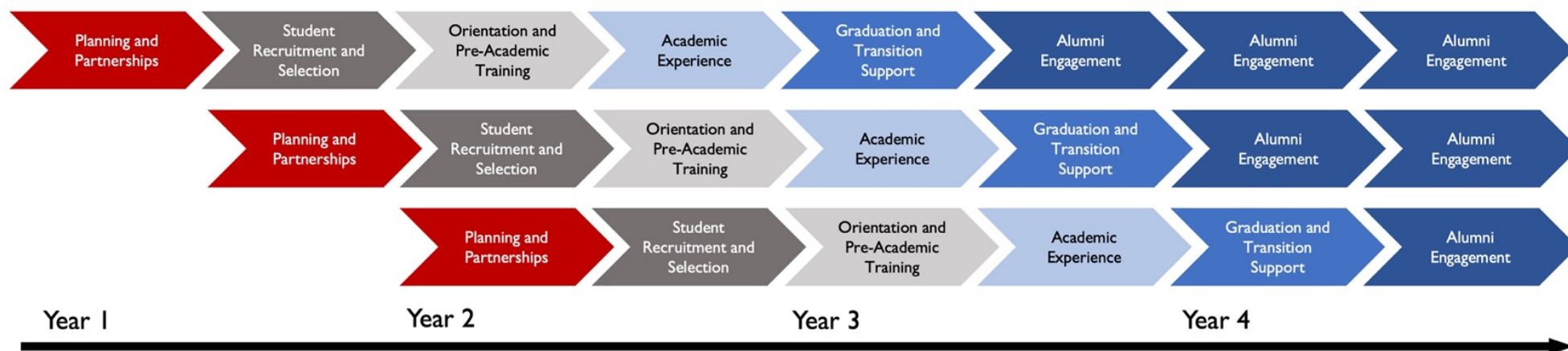
### Overlapping Cohorts

Some scholarship activities have multiple cohorts of students during the life of the activity. See Figure 2 to see how this might look for a scholarship activity with three cohorts of students who start each autumn for three years over a total activity life of five years.

<sup>2</sup> USAID. “How-To Note: Developing a Project Logic Model (and its Associated Theory of Change).” (2017). [https://usaidlearninglab.org/sites/default/files/resource/files/project\\_logic\\_model\\_how\\_to\\_note\\_final\\_sep1.pdf](https://usaidlearninglab.org/sites/default/files/resource/files/project_logic_model_how_to_note_final_sep1.pdf)

<sup>3</sup> USAID. “How-To Note: Activity Monitoring, Evaluation, and Learning Plan.” (2016). <https://usaidlearninglab.org/library/how-note-activity-monitoring-evaluation-and-learning-plan>

**FIGURE 2.** Overlapping Cohorts



**TABLE I.** Benefits and Challenges of Working with Overlapping Cohorts

BENEFITS	CHALLENGES
<ul style="list-style-type: none"> <li>Overlapping cohorts may provide opportunities to bring cohorts together and build greater networks.</li> <li>Activity alumni who have graduated can serve as mentors to current students, help advertise for the scholarship, or provide support in other ways.</li> <li>A collaboration, learning, and adapting approach (CLA)<sup>4</sup> and your MEL strategy can help identify areas for improvement, allowing changes in specific aspects of the scholarship activity before it ends.</li> </ul>	<ul style="list-style-type: none"> <li>Without significant planning, administrators can have heavy workloads during certain times of year, as different interventions or supports are needed for different cohorts at the same time.</li> <li>Working with multiple higher education institutions, which are on different schedules, or across multiple host countries, can be complicated.</li> </ul>

<sup>4</sup> USAID. "Collaborating, Learning, and Adapting Toolkit." (n.d.) <https://usaidlearninglab.org/cla-toolkit>

### 3. SIX STAGES OF A SCHOLARSHIP ACTIVITY: STUDENT AND IMPLEMENTER PERSPECTIVES

In this section, each of the six stages are explained and a list of illustrative activities are provided. These are not intended to be comprehensive; instead, they guide planning and implementation. Two perspectives are noted in line with each stage: the perspective of the student and that of the administrators.



Importantly, the **student** perspective is listed first and is marked by a graduation cap icon. By having a separate section for the student perspective, this evidence report emphasizes that students may be considering different issues and concerns at different stages. In a scholarship activity designed with the student at the center, keeping these student perspectives in mind can help improve the scholarship activity implementation and overall efficacy.



The perspective of the **administrator** is marked with the icon of a person sitting at a desk. For the purpose of this document, the administrator can represent either the USAID staff acting as the Agreement/Contracting Officer Representative or the implementing partner. In this document, the specific duties of the USAID staff, of the implementing partner, and of the host higher education institution are not explicitly separated out, as each activity has slightly different contours and partnerships in place.

Finally, in USAID higher education scholarship activities, there are typically two types of scholarships: stand-alone and embedded. **Stand-alone scholarships** are activities where the scholarship programming is the only focus to meet an activity goal. **Embedded scholarships** are those where the scholarship is one of several interventions that meet a project or activity goal. Embedded scholarships are often part of sector-specific programming such as agriculture, public health, or larger education activities. This document is created primarily with stand-alone programs in mind, although there may be considerations applicable to embedded scholarship programming as well. For additional guidance on embedded program activities, please see [Good Practices for Scholarships Embedded in Larger USAID Activities](#).





## Planning and Partnerships

### Stage 1: Planning and Partnerships

The first stage of implementation of a scholarship activity, *Planning and Partnerships*, begins when the scholarship activity award is made following a competitive selection process. In this first stage, the primary activities, outlined below, are completed by the implementation team.

This work is intended to get things ready to begin student recruitment. Considerations at this stage are many, and we recommend referring to other resources in the full [USAID Higher Education Scholarship Toolkit](#).

This stage lays the groundwork for other stages. In the first year of an activity, this may be considered an “inception phase.”

ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
Students 	<ul style="list-style-type: none"> <li>• None</li> </ul>
Administrators 	<ul style="list-style-type: none"> <li>• Finalizing activity work plan, budget, MEL plan, and branding and marking guide</li> <li>• Selecting sub-awardee partners</li> <li>• Coordinating with national or local governments</li> <li>• Considering co-funding mechanism</li> <li>• Establishing higher education institutional partnerships</li> <li>• Coordinating duties, roles, and responsibilities among partners</li> <li>• Developing a student complaint handling mechanism</li> <li>• Ensuring that the work plan and other documents are inclusive across different groups, perspectives, and regions</li> <li>• Developing alumni engagement structures and/or strategies</li> </ul>







## Stage 2: Student Recruitment and Selection

The second stage, *Student Recruitment and Selection*, includes recruitment and the selection process. The volume of work for the implementing partner is very high during this period. For students, there are multiple personal choices that must be made in deciding to apply and interview for the scholarship.

This stage may take between several months (at a minimum) and up to a year. Please see [Intentionally Designing USAID Scholarship Programming for Inclusion](#) on good practices for recruitment and selection for marginalized students in scholarship activities. Stage 2 must be done in time to match students with host higher education institutions and to give them enough time to prepare for their studies or travels, including scheduling for visa interviews, taking language examinations, quarantining, or other pre-academic activities.

ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
Students 	<ul style="list-style-type: none"> <li>• Learning about the scholarship activity and getting access to information</li> <li>• Preparing documents for submission</li> <li>• Submitting application materials</li> <li>• Meeting (or negotiating) eligibility requirements</li> <li>• Managing parental or family involvement and decision making</li> <li>• Preparing for interview</li> <li>• Preparing for and taking required exams (i.e. TOEFL)</li> <li>• Compiling information on higher education institutions (HEIs) and study destination (overseas/in-country)</li> </ul>
Administrators 	<ul style="list-style-type: none"> <li>• Executing marketing plan and recruitment strategy, especially targeting beneficiaries traditionally overlooked</li> <li>• Developing selection criteria, with equity in mind</li> <li>• Organizing selection process and timeline</li> <li>• Connecting with scholarship alumni to support recruitment and selection efforts</li> <li>• Coordinating review process of applications</li> <li>• Organizing interview process</li> <li>• Coordinating applicants' test preparation</li> <li>• Conducting selection and placing students with HEIs</li> <li>• Preparing award or contract letters with finalists</li> <li>• Sending alternate and rejection letters</li> <li>• Answering questions</li> </ul>



### Orientation and Pre-Academic Training

## Stage 3: Orientation and Pre-Academic Training

This third stage, *Orientation and Pre-Academic Training*, begins once scholarship finalists are selected and before they begin their studies. During Stage 3, implementers focus on preparing students to be successful in their academic program. Students are often concerned

with more immediate issues (e.g., where to live, obtaining a visa, bringing dependents, travel arrangements).

This period may last a few weeks, a few months, or a year or more, depending on the activity model and how many components will be included in the orientation and pre-academic training, i.e., interventions such as remedial English training may extend this stage. Please see [Intentionally Designing USAID Scholarship Programming for Inclusion](#) on good practices for pre-academic training for marginalized students in scholarship programs.

ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
Students 	<ul style="list-style-type: none"> <li>• Attending orientation and pre-academic training</li> <li>• Meeting fellow cohort of students in the activity</li> <li>• Preparing enrollment paperwork</li> <li>• If leaving country of residence, prepare visa paperwork and other documentation (e.g., obtaining or updating passport) and seek advice and support from Public Affairs Section or EducationUSA advising centers</li> <li>• Preparing to move</li> <li>• Homesickness and leaving family</li> <li>• Meeting new classmates at host higher education institution</li> </ul>
Administrators 	<ul style="list-style-type: none"> <li>• Organizing pre-academic training, including academic, leadership, or other training</li> <li>• Presenting scholarship expectations (e.g., grant guidelines, code of conduct) and opportunities (e.g., alumni association) to students</li> <li>• Planning in-country program orientation and providing other vital information, such as differences between HEIs in home and host country</li> <li>• Inviting scholarship alumni to be part of orientation, mentoring programs, or other information sessions</li> <li>• Assist students with housing, insurance, and other paperwork</li> <li>• If students leaving country of residence, assist with visa paperwork and interviews</li> <li>• Coordinating student accommodations and flights, monitoring arrival on campus</li> <li>• Introduce students to academic advisor and other support services</li> <li>• Introducing new students to alumni or other mentors</li> <li>• Answering questions</li> </ul>





## Stage 4: Academic Experience

The *Academic Experience* is marked by the beginning of academic or vocational study and concludes with completion of the degree or certification. During Stage 4, students are often busy with academic work and engage mostly with their host higher education institution faculty, staff, and peers. Implementing partners may only hear from students when there are problems. Ongoing monitoring and support—or the act of proactively checking on students—is a good practice to make sure that things are going well, that their stipends have been disbursed on time, and to avoid emergencies.

In addition, implementers may be planning conferences, soft-skills training opportunities, internships, mentoring programs, or other scholarship-related events or support during this time. Please see [Beyond Financial Assistance: Good Practices for Extracurricular Programming in USAID Scholarships](#) for examples of these types of activities.

The length of Stage 4 depends on the length of the academic degree or training.



ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
Students 	<ul style="list-style-type: none"> <li>• Enrolling in courses</li> <li>• Managing learning and classwork</li> <li>• Participating in extracurricular activities</li> <li>• Adjusting to new culture or environment</li> <li>• Maintaining relationships with family, friends, and community at home</li> <li>• Developing new relationships and friendships at host institution</li> <li>• Participating in additional programming as part of scholarship, such as a mentorship program, professional development, or internship</li> <li>• Navigating illness, mental health, and loneliness</li> <li>• For advanced degree students, planning thesis or dissertation, including collecting data and defending final assignment</li> <li>• Planning for post graduation, preparing for their profession, and seeking employment</li> </ul>
Administrators 	<ul style="list-style-type: none"> <li>• Maintaining host higher education institutional relationships</li> <li>• Monitoring student progress</li> <li>• Ongoing monitoring and wrap-around support—checking in on student wellbeing</li> <li>• Managing student insurance and medical care</li> <li>• Managing emergency situations</li> <li>• Paying student bills and tuition fees</li> <li>• Coordinating additional programming for students, such as conferences or summer internships</li> <li>• Providing quarterly or annual reporting to USAID</li> <li>• Monitoring, learning, and adapting for future cohorts or stages of implementation</li> </ul>



## Stage 5: Graduation and Post-Graduation Transitions

Stage 5 focuses on *Student Graduation and Transition Support* to the next steps after graduation. In some scholarship activities, students may be required to return to a position that they previously held or pursue public service as a condition of the scholarship support. Other students may be seeking employment, further education, or otherwise determining their options and navigating complicated decisions. In most cases, there is considerable uncertainty at this stage. Implementing partners are mostly focused on completing or continuing the activity implementation and supporting the student to return home (if studying abroad or outside of their home community), find employment, or pursue additional educational opportunities.

Stage 5 may begin several months before graduation, as students begin to apply for internships and employment, consider mobility, and make other decisions. Depending on the course of study or training, this stage may extend up to several years after they graduate (e.g., if the student is pursuing a postdoc following doctoral studies). Stage 5 is also a good opportunity to reconnect with scholarship students with the USAID Mission, scholarship alumni, and partners and beneficiaries of larger activities—especially for embedded scholarships. See additional information at [Good Practices for Scholarships Embedded in Larger USAID Activities](#) and [Engaging Alumni from USAID Higher Education Scholarship Programming](#).

ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
Students 	<ul style="list-style-type: none"> <li>• Completing courses in good standing and graduate</li> <li>• Saying goodbye to host HEI faculty, staff, and friends</li> <li>• Managing applications for next opportunity (employment, graduate schools, etc.) and managing expectations about transition to work</li> <li>• Dealing with heightened uncertainty and anxiety about next steps, including finances and employment</li> <li>• Managing pressures to return home or seek opportunities abroad</li> <li>• Meeting scholarship program requirements and expectations</li> <li>• Learning about alumni association(s) and other alumni resources</li> <li>• Navigating return to home community and culture</li> </ul>
Administrators 	<ul style="list-style-type: none"> <li>• Collecting final reports and other paperwork</li> <li>• Coordinating students' return to country of origin</li> <li>• Arranging re-entry briefing and meetings for students, Mission staff, and others</li> <li>• Ensuring visa compliance,<sup>5</sup> exploring options like optional practical training,<sup>6</sup> and requesting extensions</li> <li>• Support for transitions, including employment, internships, or other transitions</li> <li>• Considering special requests (e.g., option to stay for advanced degree)</li> <li>• Providing students with certificate, testimonial, or other evidence of completion of the scholarship activity</li> </ul>

<sup>5</sup> USAID. ADS Chapter 252. "Visa Compliance for Exchange Visitors." (2019). <https://www.usaid.gov/ads/policy/200/252>



<sup>6</sup> U.S. Citizenship and Immigration Services. "Optional Practical Training (OPT) for F-1 Students." (2021). <https://www.uscis.gov/working-in-the-united-states/students-and-exchange-visitors/optional-practical-training-opt-for-f-1-students>



## Stage 6: Alumni Engagement

*Alumni Engagement* should begin before graduation and lasts indefinitely. For some scholarships, students join alumni activities immediately after they are selected, for example, joining an alumni mentoring program. In theory, there is no ending date for this stage: alumni connections and other networks established during the scholarship activity may follow a person for their entire life.

Research shows that alumni often benefit from support from the scholarship funding entity to organize themselves into an association.<sup>7</sup> Therefore, while most of the work in Stage 6 is done by the alumni themselves, USAID and the implementing partner can be important in ensuring the success of alumni engagement. Please see [Engaging Alumni from USAID Higher Education Scholarship Programming](#) or more information on working with and engaging alumni to advance higher education scholarship programming goals.

ROLE	PRIMARY ACTIVITIES DURING THIS STAGE
<div>Students</div> <div></div>	<ul style="list-style-type: none"><li>• Seeking support and funding for projects</li><li>• Seeking employment or new opportunities</li><li>• Wanting network of like-minded individuals to help create change</li><li>• Being active in alumni association</li><li>• Creating other connections with alumni to learn about ways to get involved and find employment</li><li>• Wanting to fulfil the requirements of the scholarship</li></ul>
<div>Administrators</div> <div></div>	<ul style="list-style-type: none"><li>• Tracking and monitoring of alumni</li><li>• Evaluating program</li><li>• Engaging alumni in USAID programming</li><li>• Asking alumni to serve as mentors for new students</li><li>• Coordinating alumni events</li><li>• Supporting alumni association</li></ul>

<sup>7</sup> Campbell, Anne C., and Aryn R. Baxter. "Exploring the attributes and practices of alumni associations that advance social change." *International Journal of Educational Development* 66 (2019): 164-172.

## 4. CONCLUSION

Each and every USAID scholarship activity is unique—and should be designed and implemented based on the local context and needs of the USAID partner country, grounded in good practices and evidence of what works. This resource in the USAID Higher Education Scholarship Toolkit is intended to provide guideposts on the stages that any USAID scholarship activity may need to take into consideration over the life of the activity.

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**Remember:**

Administrators and students work together to achieve the scholarship activity goals.

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