Discussions about achieving access and equity in higher education are often centered on debates about university admissions policies. While this focus is to be expected given the direct bearing that admissions policies have on who gains access, there are initiatives beyond the university sphere that seek to increase equity in higher education. Scholarship and fellowship programs, both public and private, impact the lives of countless individuals pursuing tertiary education, and many of these programs seek not just to provide financial support, but to achieve broader aims for the greater public good.

The Ford Foundation International Fellowships Program (IFP) is one such program that sought to address educational inequality on a large scale by providing over 4,300 graduate fellowships to individuals from some of the most marginalized populations worldwide. The Institute of International Education (IIE) is carrying out a 10-year IFP Alumni Tracking Study that examines the broader impacts of IFP on its fellows and their home communities. This issue brief analyzes the role that such programs can play in promoting equity in higher education.

Researchers and practitioners alike can use this brief to consider different conceptual and programmatic approaches to advancing equity in higher education using IFP as an example. The brief draws upon the work of Michele S. Moses, a philosopher of education who identifies four salient types of justification for affirmative action policies at universities. These rationales provide a conceptual framework for understanding different approaches to achieving educational equity, including those employed by IFP.

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

Launched with the largest single grant in the Ford Foundation’s history, from 2001 to 2010 the IFP fellowship provided advanced study opportunities to more than 4,300 individuals from 22 different countries in Asia, Africa, Latin America, the Middle East, and Russia. From its inception, IFP was intended to be much more than a fellowship program. The program not only sought to provide opportunities to individuals that had traditionally been excluded from higher education, it sought to select fellows that would serve as agents of change and advance social justice in their home communities.

Why is this topic important?

The goal of this issue brief is to promote dialogue and reflection on issues of educational equity in higher education. By taking the conceptual framework developed by Moses and applying it to the IFP fellowship and IIE’s research study, the following themes can be further examined:

- **Definitions of equity in higher education.** Achieving access and equity in higher education first requires an understanding of what that means, and the conceptions of equity explored in this brief can help readers achieve a deeper understanding these categorizations.

- **A holistic approach to promoting equity.** There are many different programmatic approaches that can be taken to advancing equity in higher education. By identifying the ways that the IFP fellowship invoked different justifications for affirmative action, readers are presented with a comprehensive program model for promoting equity in higher education.

- **Global and local approaches to equity.** While university affirmative action policies are institutionally, regionally, or nationally based, international scholarship programs like IFP are able to have a global reach. Moreover, IFP’s deliberate focus on implementing a program that was attuned to the national contexts in which it operated shows how a program can be simultaneously global and local in its approach.

As IIE embarks on its 10-year IFP Alumni Tracking Study, the importance of studying issues related to equity in higher education is paramount. By engaging with the ideas of scholars like Moses, we will be better positioned to analyze efforts to achieve educational equity in our own research, as well as to contribute to broader discussions on the subject.

Defining “affirmative action”

Policies that are called “affirmative action” in the United States may be referred to as “reservation” in India, “positive discrimination” in France and “quotas” in Brazil. Moreover, the specific names given to such policies can vary according to the national context and the specific approaches employed.

What these various policies ultimately have in common with each other, as well as with the IFP fellowship, is the aim to “increase access to and equity within higher education.” This broad definition—put forth by Moses in her article *Moral and Instrumental Rationales for Affirmative Action in Five National Contexts*—encompasses a range of specific criteria that may be considered when making admissions decisions. Moses’ work illustrates that while the specific factors

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taken into account ultimately depend on the national context, they often include characteristics such as race, ethnicity, gender, and socioeconomic status.

**Rationales for Affirmative Action: a Conceptual Framework**

In *Affirmative Action in Five National Contexts*, Moses conducts a comprehensive review of affirmative action policies in five countries: the United States, France, Brazil, India, and South Africa. In her examination of affirmative action policies in each country, she considers not only historical developments, but the influence that national ideology and other social factors have had on policy formation and development.

Drawing from this comprehensive examination, Moses identifies four “rationales” or justifications that underpin affirmative action policy worldwide: remediation, economics, diversity, and social justice. In addition, she further characterizes each rationale as “moral” or “instrumental.” (See graphic above).

“Instrumental” justifications are those where affirmative action serves as a tool to achieve some other goal or end. Such goals could include a diverse student body (which in turn provides desirable educational benefits), or increased economic productivity. “Moral” rationales, on the other hand, invoke more deeply held beliefs about “what is good and right and how people ought to be treated” (pg. 218). Such rationales are not as concerned with affirmative action as a means to achieve a specific objective. Rather, affirmative action is, in a sense, an end in and of itself because it fulfills deeper moral obligations. Moses characterizes the economics and diversity rationales as largely instrumental, whereas the remediation and social justice rationales are largely moral.

The following sections will discuss each of the rationales identified by Moses and how they apply to the goals and outcomes of the IFP fellowship. Subsequently, the brief will look at how each rationale links to the broader impacts being measured in IIE’s IFP Alumni Tracking Study.

**Remediation**

The remediation rationale considers affirmative action a way to compensate for past discrimination or disparities that can be attributed to characteristics such as race, socioeconomic status, and so forth. In essence, affirmative action policies are a way to rectify past wrongs. In Brazil, for example, this rationale may be linked to university practices to increase access to indigenous peoples and afro-Brazilians.²

**Remediation and IFP:** The remediation rationale underpinned IFP in a fundamental way given that the program sought to provide opportunities to individuals from disadvantaged populations. In doing so, the program sought to “…transform a traditional mechanism—an individual fellowship program for graduate degree study—into a powerful

Recognizing that marginalization can take many forms, the program exercised great diligence in identifying specific groups that experienced discrimination in each of the 22 countries in which it operated. In Brazil, for example, IFP was explicitly billed as *ação afirmativa* (affirmative action), and focused on afro- and indigenous Brazilians as well as fellows from economically disadvantaged communities. Across other IFP countries, disadvantaged populations were identified as people with disabilities, women, or religious minorities, to name a few.

**Economics**

The economics rationale speaks to the economic benefits of higher education equity, both at the individual and societal levels. There are two aspects to this rationale, the first being that affirmative action is a way to provide disadvantaged people with the education they need to enter in or be more productive in the workforce. The second aspect is that these beneficiaries of affirmative action, by obtaining an advanced degree, also serve as role models to the disadvantaged communities they come from, and will therefore motivate others to follow the same path of economic engagement.

Moses notes a certain pragmatism underlying this reasoning. Particularly in parts of the developing world where large proportions of the population live in poverty, affirmative action makes economic sense by creating opportunities for greater economic development and efficiency.

**Economics and IFP:** The individual and societal economic benefits that result from IFP were well-documented. The program was launched during a period when higher education reemerged as a “development priority” in order to prepare individuals and countries for the burgeoning global knowledge economy. The career outcomes and professional accomplishments of alumni that have been documented suggest significant potential for the larger economic development of alumni communities and countries: according to program data from 2012, 93.4% of IFP alumni were either employed or continuing their academic study and 65.8% of alumni held senior management or leadership positions.

**Diversity**

According to the diversity rationale, affirmative action is a tool to increase diversity within the student body at an institution, and this diversity is desirable because there are educational benefits to be gained as a result. Indeed, there is a large body of research devoted to the educational benefits of diversity, and Moses notes that this forms the primary basis of affirmative action policy in the U.S. today. In contrast with the other justifications for affirmative action, the
diversity rationale is focused on the benefits imparted to educational institutions that host affirmative action students (as opposed to the benefits imparted to the students themselves or society more broadly).

Diversity and IFP: The value and benefits of diversity emerged as an important and well-documented outcome of the program and are outlined in the recent publication Leadership for Social Justice in Higher Education. Over time, IFP developed partnerships with universities that recognized the value of hosting IFP fellows and who felt that the diverse perspectives they brought enriched the learning environment. The University of Hawai‘i at Mānoa in the United States, for example, hosted 166 IFP fellows. Professor Gay Garland Reed, who taught at least eight of these fellows, noted that “Having classmates who struggled with issues of marginalization and limited educational access in their home countries was eye-opening for Native Hawaiian students and for local students in general.”

Social Justice

The fourth rationale identified by Moses, and the one that is most relevant to IFP, is social justice. According to this rationale, affirmative action is a tool for dismantling long-standing, structural inequalities and promoting democratic participation. In contrast with the remediation rationale, which is focused on redressing past inequities and injustices, this rationale is more forward-looking in its focus on achieving social justice on a broad scale and over the long term. As the most strongly “moral” rationale of the four, it also implies a particular ethical orientation and a belief in the intrinsic value of equality and democracy.

Social Justice and IFP: IFP saw itself not just as a fellowship program, but as “a social justice program that would operate through higher education.”

“The idea that IFP was, first and foremost, a social justice program informed every aspect of the fellowship, from the selection process to the pre-academic training provided to fellows to boost their language, research, and computer skills. IFP placed emphasis not just on selecting individuals from marginalized communities, but on selecting people who had demonstrated leadership capabilities and a commitment to social justice themselves. Accordingly, nearly all fellows had some work experience by the time they were selected, and nearly two-thirds had completed professional training in addition to their undergraduate degree. Similarly, 37% of fellows were older than 35 at the time of selection, having spent many years working or volunteering in their local communities, be it leading their own non-profit organization, practicing medicine, teaching, or working with local farmers.

— Leadership for Social Justice in Higher Education

6 Leadership for Social Justice in Higher Education.
7 Linking Higher Education and Social Change.

8 Leadership for Social Justice in Higher Education.
Moses’ Rationales and IIE’s IFP Alumni Tracking Study

Building on research conducted during the course of program, the IFP Alumni Tracking Study is a 10-year longitudinal study designed to measure the long-term impacts of the IFP fellowship on its alumni as well as their home communities and countries.

In addition to providing a useful framework for understanding the goals and short-term outcomes of the IFP fellowship, the rationales outlined by Moses help illuminate the ways in which the study can explore topics of access and equity in higher education. The conceptual lens offered by the four rationales suggests different ways the study may contribute to discussions and debates about educational equity. Having explored the extent to which each rationale figures in the fellowship itself, how does IIE’s study address each rationale in both its design and its research questions?

Studying Remediation

Data gathered while IFP was still active shows that the program was successful in recruiting individuals from the target communities identified in each country. In an effort to measure the success of this aspect of the fellowship, our study seeks to understand whether IFP alumni have experienced any respite from discrimination. The first IFP Global Alumni Survey, sent to over 4,100 alumni of the program, asks alumni the extent to which they continue to personally experience social injustice due to a wide range of factors. Responses to this question will be linked to data gathered when alumni applied to IFP and while the program was being implemented in order to gage whether the fellowship has played a role in mitigating the marginalization experienced by alumni. Many of the factors being measured (such as race, ethnicity, and social class) are often used as criteria in affirmative admissions methodologies, but other factors—such as religion or political affiliation—speak to broader notions of what it means to be disadvantaged.

Studying Economics

Looking at the economic benefits of IFP involves looking not only at individual economic gains but community gains as well, and some of the ways the study seeks to measure such gains is by asking alumni about their employment status, salary increases, and professional opportunities they have been able to take advantage of as a result of the fellowship. In looking at economic gains at a broader level, the study team also seeks to understand whether IFP alumni are enabling members of their communities to enter in or benefit from the labor market. In addition, the role model aspect of the economics justification is particularly relevant to the Alumni Tracking Study given that the hypothesis of the study is that IFP has given alumni opportunities that have had social impacts beyond the individual experience.

Studying Diversity

Because the diversity rationale is aligned with increased diversity within the educational institutions that hosted IFP fellows, addressing this rationale would involve measuring the impacts of the fellowship on universities (and specifically, the ways in which the presence of IFP fellows has enhanced the educational environment). Such an investigation lies outside the scope of our study, and, as aforementioned, has already been studied and documented in *Leadership for Social Justice in Higher Education*. In Chapter 7, for example, Sylvia Schmelkes discusses the benefits of hosting IFP fellows at the Universidad Iberoamericana Ciudad de México, in Mexico (where Schmelkes is Director of the Research Institute for the Development of Education). The university hosted 47 IFP fellows, many of them members of indigenous groups; Schmelkes notes ways in which the presence of indigenous IFP fellows influenced the thinking of students as well as teachers and lead to a greater awareness and appreciation of indigenous cultural forms.
International Scholarships for Equity in Higher Education

Studying Social Justice

Consistent with the fact that the social justice rationale features so prominently in the goals and outcomes of the IFP fellowship, the Alumni Tracking Study is, in many ways, largely focused on measuring the social justice impacts of the program. The unprecedented scope and length of the study are especially well suited to exploring the potential for a fellowship program like IFP to promote social justice over the long term.

This focus on measuring the social justice impacts of the program features not only in the study’s research questions, but in the design of the study itself. For example, the analytical framework of the study involves an adjusted version of the Kirkpatrick model (see graphic above), which describes five levels of impact resulting from an academic experience like a fellowship program. While the research conducted during the course of the program focused on outcomes at the level of individual alumni (which can also be seen as corresponding to the remediation rationale in Moses framework), the tracking study focuses on measuring impact that alumni are able to have on the organizations where they now work, their home communities, and even their home societies (levels three, four, and five of the Kirkpatrick model). The focus on these broader levels of influence speaks directly to the potential for a program like IFP to promote social justice on a large scale.

Conclusion

As the global massification of higher education continues apace, so does interest in ensuring equity among those who benefit from it. For practitioners and educators, a look at the multi-faceted approaches of scholarship programs like IFP can provide valuable insights to universities, philanthropic organizations, and governments on different ways to achieve educational access and equity beyond the confines of the university admissions process. And for both practitioners and researchers, the brief enables the examination of the following key themes: clarifying definitions of access and equity in higher education; exploring different holistic and programmatic approaches to promoting equity; and focusing on both global and local approaches to equity.

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