



Bursary Programme Project Document **February 24, 2014**

This document serves to formalize 3ie's Bursary Programme and identify the objectives of the programme for all stakeholders. It describes the programme structures, processes and policies as well as staff roles and responsibilities.

Background and introduction

The International Initiative for Impact Evaluation (3ie) works to improve lives in low- and middle-income countries by promoting and supporting the increased production and use of better evidence from impact evaluations and systematic reviews that are relevant to policy and program design and implementation.

There is considerable demand in low- and middle-income countries (L&MICs) for assistance with individual and institutional capacity building related to the production and use of evidence. 3ie supports both of types of capacity building through a number of avenues. One of these is the 3ie Bursary Programme.

Formalized in 2013, 3ie's Bursary Programme provides funding for nationals residing in L&MICs to attend workshops and conferences throughout the world related to impact evaluations and systematic reviews. Each bursary award covers the costs of registration fees, accommodation, and round-trip economy class airfare to these events. The bursary programme provides these awards primarily to individuals who respond to posted calls for applications and as a member benefit to 3ie's L&MIC agencies.

Objectives

Individual capacity building

The most immediate and direct benefits of the bursary programme are the skills, knowledge, and networks participants build through their experience in each training or conference. Upon return to their home countries, alumni are able to apply their new knowledge to their work or academic studies. They may continue conversations with new colleagues they meet through their experience and utilize these relationships for further learning, collaboration, and professional opportunities. Both applicants and alumni consistently indicate that they view the learning and networking opportunities provided by the bursary program as key benefits of participation.

Institutional capacity building

3ie bursaries are awarded with the expectation that alumni will share the lessons learned with colleagues and promote better use of evidence within their institutions. 3ie will monitor progress through post-course surveys.

3ie highlights applications received through the open calls that demonstrate how the applicant will transmit knowledge to others, whether colleagues or students and support his or her institution to use and engage with high quality evidence. Examples include making presentations to peers or students, undertaking or commissioning impact evaluations or systematic reviews, or galvanizing senior management to conduct a relevant conference or meeting.

Incorporating the bursary programme into member benefits provides a second, more sustained pathway to institutional change. Alumni nominated by L&MIC member agencies return and share their knowledge with colleagues who are already committed to evidence-based policy. Over time multiple beneficiaries from a single agency will further strengthen institutional capacity. Participation can also enhance 3ie's relationships with existing members.

Promoting a culture of evidence

The bursary programme furthers 3ie's work to build a culture of evidence in the development sector. Through the lessons learned at trainings or events, bursary programme alumni are better able to produce or use evidence in their work. Whether alumni are policymakers, programme managers, or researchers, they may continue building these skills within their organizations or further professional development. They may share their knowledge with others and promote better use of evidence within their institutions and other networks.

3ie's Bursary Programme further promotes a culture of evidence through communications and programmatic activities. It supports the development sector at large by publicizing and promoting trainings and conferences organized by partner institutions. Bursary programme alumni may also encourage peers to attend future trainings and events.

Overview of the bursary awards to date

Since its inception in 2008, 3ie provided approximately 750 bursary awards for events around the world, predominately for major conferences organized by 3ie. Participants have been nationals residing in L&MICs and meet other selection criteria tailored to the content of each course or conference. However the events themselves were selected based on 3ie's staff knowledge of what is available, drawing in part on our partnerships with C2 and RIPA, and close relationship with CLEAR.

Formalizing the bursary programme allowed 3ie to select a set of trainings and conferences taking place over the calendar year that best supported its strategic aim of increasing capacity to produce and use evidence. During 2013 3ie provided or committed funding for 62 awards for 12 courses.

For a full list of events 3ie has provided bursaries for in 2013 please see Appendix A.

Table 1. 2013 3ie bursary courses and awards

Course	Location	Awards	Applications/selection
IDS	UK	3	Selected by course organisers in consultation with 3ie. LIC nationals only.
CLEAR technical training	China	2	DepEd (Philippines) nominees.
RIPA International Impact Assessment (3 courses during 2013)	UK	10	6 participants selected through open call. 174 applications received. Additional participants selected by L&MIC members.
C2 Colloquium	US	6	Open call. 22 applications.
CLEAR Technical Training	Uganda	10	Open call. 230 applications*
UEA Short Course	UK	2**	Selected by course organisers in consultation with 3ie. LIC nationals only.
C1 Colloquium	Canada	5	Open call. 87 applications.
Meeting on inclusion of QE studies in SRs of Health systems research (AHPSR/HSPH)	US	2	SR researchers only. Nominated by 3ie SR Office.
Impact Evaluation Network meeting /LACEA	Peru	2	Selected by Latin American membership.
CLEAR Technical Training	South Africa	18	Ten awards provided through open call. Up to 8 to member representatives of 3ie African government agency representatives***
Total awards 2013		60	

*There was a two-phase application process: 230 initial applications, which included CVs and statements of purpose. To complete the full application, applicants were asked to take a pre-course quiz testing statistical knowledge. 100 applicants returned these quizzes before the deadline. **Funds for a third award transferred to a 2014 award for an MSc student. ***Programme held in January 2014.

Programme structure, processes, and policies for 2014

In 2013 staff developed processes and communications materials to support the programme's day-to-day management, as well as web content and other communications to promote specific course opportunities. Staff also developed programmatic materials to better integrate the programme into 3ie's mission and strategy.

As in 2013, the Bursary Programme in 2014 will continue to be directed by 3ie's Executive Director and supported by the Bursary Office currently seated in 3ie's Washington DC office. This office is staffed by one of the Washington Office's Program Managers, who is responsible for the day-to-day programme management and contributions to programme strategy. The Programme Manager is supported by one of the Washington Office Interns and guided by the Head of the Washington Office as necessary. The Deputy Director of Finance in 3ie's New Delhi office provides additional guidance as necessary on contracts and budgets.

During the 2014-2016 strategy period 3ie will significantly increase the number of bursaries it awards each year. A larger portion of awards will be provided to members both in response to increasing Southern membership and to support institutional capacity building over time. 3ie will apply lessons learned during the programme's first year to improve processes and better communicate with and support programme alumni.

General bursary programme processes and policies are described below. They may be modified slightly for individual courses.

Planning

Before the beginning of each calendar year the Executive Director selects the courses and conferences 3ie will provide bursaries for, the number of bursaries per course, and the portion of awards provided to members. The Executive Director, with support from the Programme Manager develops a preliminary budget, leaving some discretionary funding available for new opportunities that may arise during the year.

Selecting courses in advance of the year assists allows 3ie to strategically select courses that best fit 3ie's agenda. It also assists with work planning.

The Bursary Programme Manager communicates with course organizers to coordinate the application process, registration, invoicing, and other issues. Due to the expansion of the programme, 3ie will ask course organizers to take on more administrative responsibilities where desirable and possible.

In some cases, particularly where course organizers take full responsibility for recruitment and travel, 3ie may contract with the host organization. The Programme Manager is responsible for preparing any contracts associated with the Bursary Programme, with support from the Finance Office and with final approval from the Executive Director. The institution hosting the event is



asked to take on these administrative responsibilities with no additional expense to 3ie, since they are benefitting from additional participants who pay course fees.

Recruitment

3ie recruits participants who are not affiliated with its member agencies though calls for applications posted on the 3ie website and social media. In some cases, e.g. CLEAR, RIPA, the Bursary Programme Manager works with the Course organizers to design and coordinate the application process.

Calls for applications include a description of the event and a link to the course organizer’s website or advertisement. They describe the costs covered by 3ie bursaries and those that are the responsibility of the participants. They provide the application deadline and instructions, including a link to an application form created on Survey Monkey. The application form includes spaces for contact and other general information as well as short-answer questions asking the applicants to describe their motivations for attending the course and how they intend to apply the lessons learned. A template application form is provided in Appendix B. The form will be tailored for specific courses as necessary, and can be emailed as a form to applicants experiencing technical difficulties.

To recruit participants from member agencies, the bursary Programme Manager emails Member representatives, copying the Executive Director and the Officer for Monitoring, Donor Grant Management and Reporting. The email contains the same course information and description of costs covered. The member representatives are asked to nominate a representative from their agency to attend the course, and provide that person’s contact details to the Bursary Programme Manager. Member nominees are not required to submit a formal application to the programme unless required by course organizers.

Costs policies

- For each bursary award, 3ie covers the costs of round-trip economy-class fare from the participant’s home city, accommodation near the event venue specified by 3ie, and registration fees.
- Bursary programme participants are responsible for paying costs associated with the visa application process, ground transportation, and meals that are not included with registration fees. Where possible, 3ie will arrange for accommodation that includes breakfasts.
- 3ie will not provide per diems or other reimbursements.

Selection

3ie awards bursaries on a competitive basis to applicants who apply through the open calls. When applications are reviewed briefly by the Bursary Office to ensure they are complete and that applicants are eligible for participation. Completed applications include the submitted application form, CV, and a letter of support from the applicant’s employer. Upon receipt, the applications are compiled and briefly reviewed for completeness and to ensure the applicants are eligible for participation.

After the application deadline the applications are reviewed more thoroughly according to the selection criteria for each course. Based on these criteria and the strength of each applicant's CV and personal statements, the applicant pool is narrowed to approximately 25 candidates. These applications are reduced short list of recommended and alternate candidates. The short list presents the names, summary of qualifications, and justification for the recommendation. It is sent to the Executive Director, who selects and approves the appropriate number of participants. An email listing the names and home countries of the participants and intended dates of travel is sent to the Executive Director for approval, copying the Finance Office.

Eligibility Requirements for Bursary Participants

- Participants must be developing country nationals currently residing in a low- or middle-income country actively engaged in impact evaluation or systematic review.
- Participants must meet any additional eligibility requirements posted by the course organizers.
- Participants applying through the open calls must submit completed applications by the application deadline.
- Member nominees must confirm participation and provide any requested documentation by the deadline noted in the announcement email.
- All participants must communicate with 3ie's bursary programme in a timely manner regarding travel or other logistics. Failure to return the travel profile or to respond to the proposed itinerary in a timely manner will result in the bursary being cancelled.
- Participants must commit to attending the full training or conference.

Notification and Confirmation

Applicants selected for participation are notified of their awards via email. The emails congratulate the participants and briefly describe the logistical procedures involved with the flight process. An official award letter is attached to the email. The award letter provides a short description of the course, the costs covered by 3ie, and the requirements for participation—attending all sessions and completing a post-course survey. Participants nominated by 3ie members also receive award letters and practical information. Applicants who are not selected for participation are notified via email so they may look for alternate funding.

All participants are asked to confirm participation and return a completed travel profile and a scanned copy of their passport within 48-72 hours of receiving their award letter.

The Programme Manager creates a tracking spreadsheet to aid in managing the logistics for each participant and the course overall.

Flights

When participants confirm participation and return their travel information, the details are sent to the travel agent as they are received. The travel agent returns an itinerary, which is reviewed by the Programme Manager. The Programme Manager may approve flight variances of up to



\$200 dollars with justification, such as an excessive difference in flight times. The Executive Director must approve variances over \$200.

Where possible, 3ie will try to schedule return flights on the evening of the last day of the course. Where evening flights are not available, 3ie will pay for an additional night of accommodation and schedule the return ticket for the following day. If an itinerary with an evening return flight is more than \$350 than an itinerary with a return flight on the following day, 3ie will ask participants to stay for an additional night at the course location.

After the Programme Manager reviews the itinerary, it is sent to the participant to review for accuracy. The participant must confirm they will fly at the proposed times before the ticket is issued. When the ticket is issued, the Bursary Programme Manager, the Washington Office Operations Associate, and the participant are sent copies of the e-ticket from the travel agent. Flight information and costs are entered into the tracking spreadsheet.

Bursary Programme Flight Policies

- 3ie will strive to find cost effective flights with reasonable routing based on information provided in the travel profile. 3ie will aim to reduce the number of stopovers and total flight time to the extent possible
- All itineraries will allow the participants to complete the full course. That is, participants will not be required to miss course sessions in order to make a flight.
- Participants will be asked to review itineraries for accuracy and confirm their ability to fly at the selected times/days. Any concerns about arrival or departures should be stated in the travel profile. 3ie cannot accommodate requests for alternate routing, trip extensions, or specific airlines.
- Where possible, 3ie will try to schedule return flights on the evening of the last day of the course. If this is not possible due to the course format or evening flight availability, 3ie will pay for an additional night of accommodation and schedule the return ticket for the following day. If an itinerary with an evening return flight is more than \$350 than an itinerary with a return flight on the following day, 3ie will ask participants to stay for an additional night at the course location.
- Due to airline regulations, the travel agent is unable in many cases to reserve an airline ticket for more than 24 or 48 hours. Participants are asked to respond as soon as possible to all communications related to travel. If participants do not respond within the requested time the bursary will be cancelled.

Accommodation

3ie provides reasonably priced accommodation nearby the conference or training venue. When possible, 3ie will reserve accommodations that provide breakfast, but this is not guaranteed.

Other logistics

Passport details and other required information for the participants will be sent to the course organizers to prepare visa support letters. 3ie will work with course organizers on registration

and invoicing.

Communications (media)

Communications activities play a dual role in 3ie's bursary programme. The majority of communications activities and materials are aimed at disseminating information about the bursary programme and promoting the trainings and events themselves. 3ie's social media (Facebook, Twitter), newsletter, and website are the major methods for these communications.

Currently the website includes information on applying for upcoming courses and general bursary programme information including background and eligibility criteria. In 2014 the web page will be expanded to include participant testimonials, programme materials including a project document, policy document, and programme brochure.

All bursary applicants and participants are added to 3ie's email list and therefore receive the 3ie newsletter informing them of upcoming bursary calls for applications and news about other 3ie programmes.

3ie also uses communications to bring awareness of 3ie's work and vision to bursary participants and alumni, described in more detail below.

Learning and relationship building

As a young and global organization with a vital agenda 3ie pursues many avenues to promote its mission and objectives. The benefits that the bursary programme provides to individuals and institutions contribute to 3ie's agenda of building a culture of evidence.

3ie recognizes that bursary programme alumni will contribute to the sector through their research, their policy or programme work, and helping to build the capacity of other individuals or institutions. Bursary programme alumni also represent a strong potential network of future 3ie grantees, collaborators, members, partners, staff, and consultants. Thus 3ie seeks to ensure that participants, who generally attend courses organized by external organizations, are aware of its work and the public goods it provides to the sector.

3ie provides links to various resources on the 3ie website in its communications with bursary programme applicants, participants and alumni. For example, the email accompanying an award letter to a conference on Systematic reviews will include a link to the Systematic Reviews Resources Section on the "Improve Evaluation" web page. Emails accompanying the post-course survey can be tailored to provide a broader picture of 3ie's public goods and publications, or upcoming funding opportunities of interest to specific groups. 3ie will also share membership information with representatives of non-member government agencies and NGOs where appropriate.

Post-course surveys

3ie's Bursary Programme has developed two post-course surveys. The first of these is distributed to participants shortly after course completion. It asks for feedback on the course content and structure, plans to use the lessons learned within their roles, plans to present or otherwise share their new knowledge with colleagues, and communications with 3ie's bursary team. It also asks for suggestions for further developing the programme and engaging with alumni.

The second survey is distributed approximately six months after the conclusion of the course, and is an opportunity to learn how participants are actually using the skills, knowledge, and networks gained through their participation in the course. Specifically, the six-month survey asks participants to detail whether and how they implemented their earlier stated plans to use and share the lessons learned. 3ie learns from both surveys as well as feedback from staff and Board Commissioners. This knowledge is used to inform course selection and other aspects of the bursary programme.

Engagement

Through the post course survey and thank-you notes sent after the course, alumni have consistently expressed a desire to remain engaged with 3ie. Continued engagement with bursary alumni supports 3ie's mission by encouraging and supporting them in their work to better produce and use evidence. Relationships built with bursary programme alumni may be useful both for the individual and for 3ie as future opportunities—on either end, arise.

The challenge for 3ie has been determining appropriate programmatic activity to do so, given the diverse geographies, professional backgrounds, and interests of alumni, limited staff and resources, and organizational emphasis on providing resources and opportunities for the public at large rather than a specific target group.

As in 2013, the best way to engage with participants during 2014 may be at the individual level. For instance, as the main point of contact for applicants, participants, and alumni, bursary programme staff sometimes receive inquiries related to other aspects of 3ie. These inquiries are answered or directed to appropriate resources or staff. Another way that 3ie may engage with participants during 2014 is by hosting informal side meetings at specific conference or events to discuss participants' interests and opportunities for future collaboration or support at the individual or institutional level.

By communicating with individuals, 3ie may learn of ways to support alumni in their work or efforts to transmit lessons learned to others, for instance providing materials or guidance to trainers. 3ie may also be able to connect bursary programme alumni with other 3ie stakeholders in their home countries to support those networks.

Some alumni have also suggested other ways of engaging with 3ie, such as sharing bursary course announcements with colleagues, informing 3ie of upcoming opportunities in their home

country, and providing feedback on 3ie materials and resources.

Some alumni have expressed that they are interested in sharing information about 3ie with their networks, especially disseminating bursary announcements.

Currently, the bursary programme does have limited resources. Also, as a new programme, 3ie will continue to learn about participants interests about the usefulness of course content over time in order to determine how to best engage or offer resources to alumni. Some suggestions that may be implemented in the future include a dedicated Facebook Group or message board, a 'young leaders' track offering additional resources for taking lessons learned to their organization, and webinars or online resources that will reinforce course content and be available to the general public through the 3ie website.

3ie is currently building a database of all participants with contact and biographical information that will help develop these resources in the future and support communications with individuals as described above.

Bursary programme indicators

Some potential indicators for the bursary programme include the total number of applications and the diversity of countries and regions represented among bursary participants. However, using these indicators as measures of success may be easily misleading as many factors inform the selection process for each course. Further, the decision to apply for a 3ie bursary is likely to be based on interest in the course or event itself and the availability of other sources of funding.

Useful information can be gained through the post-course survey and six-month survey. Indicators for 2014 may include the following:

- Number of general and member alumni.
- Percentage of alumni completing the six-month survey.
- Percentage of alumni who find the course content useful and interesting.
- Percentage of alumni who intend to use the lessons learned in their work.
- Percentage of alumni (selected through open call or membership) who can provide examples of using course knowledge and skills in their work after six months.
- Number of alumni who have referred a colleague to the bursary programme or other 3ie resources.

Appendix A: Description of supported courses

Below is a description of past courses 3ie has provided bursaries for. Inclusion on this list does not indicate that 3ie will continue to provide bursaries to a specific course in future years. 3ie will also provide bursaries to additional trainings and conferences that fit its agenda.

3ie conferences

Prior to 2013 3ie organized three global conferences related to impact evaluation and systematic review. In 2009, 3ie organized “Perspectives on Impact Evaluation: Approaches to assessing development effectiveness” in Cairo Egypt. In 2011, 3ie brought together over 400 researchers, policymakers and programme managers at in Cuernavaca, Mexico for “Mind the Gap: From Evidence to Policy Impact.” Finally in 2012 3ie hosted the “Dhaka Colloquium on Systematic Reviews in International Development” in Bangladesh. 3ie provided a significant number of bursaries to nationals of low- and middle-income countries attending each of these events.

In the next strategy period there are no immediate plans to organize similar large-scale conferences. The bursary programme will be focused almost exclusively on external events.

Campbell Collaboration Colloquium

The Campbell Collaboration (C2) helps people make well-informed decisions by preparing, maintaining and disseminating systematic reviews in education, crime and justice, social welfare and international development. Campbell's International Secretariat is now located in Oslo and hosted by the Norwegian Knowledge Centre for the Health Services. Since 2001, Campbell has hosted annual Colloquia in various locations. These events attract researchers and policy makers from around the world. Its purpose is to promote systematic reviews of research evidence on the effectiveness of social interventions, and the methodology involved.

For more details see: http://www.campbellcollaboration.org/annual_colloquium/

CLEAR

CLEAR is a network of regional centres of excellence in monitoring and evaluation, supported by a secretariat located in IEG, World Bank. With assistance from 3ie in developing the ToR and selecting the team, CLEAR commissioned a two week impact evaluation course to be developed and initially delivered by a team from the University of Minnesota led by Paul Glewwe. 3ie reviewed the material and assisted in delivery (on use of evidence and mixed methods) at the first two deliveries of the course in China and South Africa. During 2013 it was agreed to refocus the course to be aimed exclusively at researchers, so allowing a higher technical level. The Uganda CLEAR IE course was the first offering of this refocused version. The second course will be offered in January, 2014.

For more details see: http://www.theclearinitiative.org/IE_course.html

Cochrane Colloquium

The Cochrane Collaboration (C1) is a high profile nonprofit health research organization working to help healthcare practitioners, policymakers, patients, their advocates and carers make well-informed decisions about health care by preparing, updating and promoting the accessibility of Cochrane Reviews. These reviews are published online in the Cochrane Database of Systematic Reviews, part of The Cochrane Library. Cochrane also prepares the largest collection of records of randomised controlled trials in the world. Annual Colloquia bring together up to 1200 international experts including researchers, health care professionals, policy-makers and consumers.

For more information see: <http://colloquium.cochrane.org/>

Meeting on the inclusion of quasiexperimental (QE) studies in systematic reviews of health systems research

3ie provided bursaries to researchers attending a meeting to discuss the inclusion of quasiexperimental (QE) studies in systematic reviews of health systems research. The meeting was hosted by the Department of Global Health and Population at the Harvard School of Public Health and the Alliance for Health Policy Systems and Research.

Impact Evaluation Network (IEN)

The Impact Evaluation Network (IEN) of the the Latin American and the Caribbean Economic Association (LACEA) is an initiative that aims to advance the state of knowledge and expertise regarding impact evaluation of different policies in the Latin America and Caribbean Region. The Network aims to promote impact evaluation methodologies, increase capacity building, and bridge research and policy in the region. IEN holds annual meetings that include paper presentations, discussions, and training activities.

For more information see:

http://www.lacea.org/portal/index.php?option=com_content&view=article&id=54&Itemid=7

Institute of Development Studies (IDS)

IDS offers a range of short courses delivered by IDS research fellows who are established researchers in their respective fields. The impact evaluation course is a one week course aimed at policy makers, programme managers and researchers held at IDS at the University of Sussex, UK.

For more details see: <http://www.ids.ac.uk/events/impact-evaluation-design-short-course>

Royal Institute of Public Affairs (RIPA)

RIPA is the training arm of the private consultancy, Capita. RIPA has a purpose-built training facility in central London (about one mile from the 3ie office). Phil Davies was delivering two courses for RIPA at the time he joined 3ie: Impact Assessment, and Evidence Based Policy Making. It was agreed to continue with these courses, contracted through 3ie, since RIPA does the work of bringing middle to high-level developing country policy makers to 3ie to receive the training. These courses are primarily delivered by Phil with some support from 3ie staff.

For more details see: <http://www.ripainternational.co.uk/International-Programmes/Policy-and-Strategic-Planning/Courses-in-2013/Impact-Assessment>

University of East Anglia (UEA)

UEA is home to the School of Development Studies, the longest established development-oriented teaching programme in the United Kingdom. The impact evaluation course is a relatively technical two week course. UEA also offers the only available Masters' Degree in Impact Evaluation.

For more details see: <http://www.uea.ac.uk/international-development/dev-co/professional-training/impact-evaluation> and <http://www.uea.ac.uk/study/postgraduate/taught-degree/detail/msc-impact-evaluation-for-international-development>