

# **YOUNG CANADIAN RESEARCHERS AWARD PROGRAM**

## **Program Design: Issues and their Implications**

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## EXECUTIVE SUMMARY

DADA International incorporated was invited by the Special Initiatives Program of IDRC to review the design of its Young Canadian Researchers Award Program (YCRA). Since its inception in 1982, the YCRA program has been through several efforts at fine-tuning and adjustment. Its evolution has tended to be responsive to the ambient environment at IDRC, as well as to its candidate population. The program demonstrates flexibility and innovative spirit which constitute both a strength and an Achilles heel. In the absence of a firm policy on a number of eligibility and selection criteria, there has been a certain blurring of program objectives and some loss of acuity in terms of how the program's design should reinforce its rationale. Issues — such as age, prior developing country experience, fieldwork in the country of origin, thematic focus and level of study — have seen vigorous and recurring debate, siphoning away energies that could be channelled to more constructive use. At the same time, in an atmosphere of financial constraint and continual calls for efficiency, program management is faced with some difficult choices. As all programs of this nature, the YCRA has to consider the merits of a clearly defined approach with fairly strict criteria for eligibility and selection, alongside the merits of a more flexible approach that could accommodate a broader range of promising young Canadians. A judicious balance between rigour and serendipity will bring the program to its fullest potential.

Our purpose has been to lay out the issues in such a way that YCRA program management can make the necessary executive decisions. Our method has been dialectic, in keeping with the nature of the debates that have kept the issues alive. We do not propose to let the cat out of the bag in this summary. Rather, what we would like to emphasize is that laying some of these issues to rest will allow the program to revitalize its rationale and concentrate its resources more strategically.

We suggest that readers keep a few diagnostic questions in the back of their minds, as a reminder of what the review is trying to achieve:

- ☐ What is the program's primary objective today?
- ☐ How effectively do the elements of program design serve program objective?
- ☐ How cohesively do the elements of program design fit together?
- ☐ What is the program's strategic importance to IDRC?

While the chapter dealing with issues dominates this report and is a necessary foundation for what follows, we would like to draw attention to the final two chapters, which offer a threshold onto another way of thinking about the YCRA program.

Our review confirms that the YCRA is one of the very few awards of its kind and certainly unique in Canada. Yet, it does not enjoy the visibility it deserves either within IDRC, or in the academic community at large. For greater leverage and prestige, the YCRA may wish to pursue a strategy of more focused investment in a limited number of excellent and committed researchers. To purposefully nurture a community of researchers in the field of international development, there must be more than the handing over of award money. The YCRA program should consider a comprehensive promotion

strategy, not only as an outreach to prospective candidates, but also as a way of establishing a presence to galvanize interest in the research approaches and themes that are at the heart of IDRC's mission statement.



## CHAPTER 1

### History of the Program

#### 1.1 The Early Days

Since its earliest days, IDRC recognized the need to embrace its Canadian constituency in what was generally referred to as the Canadian Program. Its purpose was to strengthen the still-nascent "Canadian capacity to participate in the formulation and implementation of a suitable research agenda on development issues from a worldwide perspective."<sup>1</sup> A cornerstone of the Canadian program in 1971 was the *PhD Award*, which enabled Canadian graduate students, primarily at the doctoral level, to undertake their field research in a developing country. The award underwent changes in 1982, re-emerging as *The Young Canadian Researchers Award (YCRA)*.

In its new incarnation, the YCRA program's goal was described as "encouraging the involvement of young Canadian researchers in scientific areas of concern to IDRC and giving them, at the same time, exposure to problems of developing countries."<sup>2</sup> Although the early 70's saw the growth of a highly motivated young generation of Canadians committed to international development, the focus tended to be on community service and teaching overseas, rather than on research. The specific objectives of the YCRA program therefore emphasized the importance of promoting *research careers* in international development, *sensitizing researchers* to development issues and *grounding their research* in the realities of developing countries. These general and specific objectives essentially constituted the rationale of the program.

The YCRA program was housed in the Fellowships and Awards Division (FAD), where it stayed until 1992. FAD worked towards the implementation of a "capacity building model" which would be congruent with the other research and training activities of the Centre. While the majority of awards granted by FAD were to support researchers from developing countries, the YCRA maintained its Canadian focus in a way that nevertheless complemented FAD's training objectives.

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1. Fellowship and Awards Division, *Capacity Building in the Canadian Context* (draft report), IDRC, Ottawa, 1991, p. 6.
  2. 1983 YCRA Project Summary.



The YCRA fostered individual competence in varying aspects of the development field at several stages of the career continuum. Its fellowships were available to two categories of recipient:

- ☐ Canadian doctoral students registered in a Canadian university and working in scientific areas of concern to IDRC; and
- ☐ young Canadian professionals in the fields of journalism, finance and administration.

Awards to both types of candidate were tenable for up to twelve months, to a maximum of \$20,000, for research conducted in a developing country. From 1982 to 1986 the fields eligible for support included agriculture, food and nutrition sciences, health sciences, information sciences, earth sciences and journalism.

Since its inception, the program has operated according to a number of specific eligibility criteria which have remained relatively stable over the years. The following criteria applied for graduate students:

**Eligibility Criteria**

- a) Canadian citizenship/permanent residence;
- b) affiliation with an institution or organization in the country in which the research will take place;
- c) excellent academic qualifications;
- d) completion of course work by the time of tenure;
- e) thesis proposal accepted by the appropriate academic committee; and
- f) good standing in a Canadian university.

For young professionals, the eligibility requirements (a) to (c) had to be met.

Program selection criteria and procedures, however, were not well defined at this stage. FAD screened applications to ensure that eligibility requirements were met and then forwarded them to the appropriate division for evaluation and comments. The divisions were simply asked to address two questions in assessing the candidate's proposal:

- ☐ Does the proposal refer to a subject of high priority to your division?
- ☐ Are the candidate's academic qualifications satisfactory?

Now entering its fifteenth year, the YCRA program has been through several rounds of adjustment and fine-tuning. It has been responsive to structural changes within IDRC and to external factors such as the evolving nature of development and trends in the student body. A chronology of some of the major events in the life of the program follows.

## **1.2 Evolution of the Program**

**1986:** This year witnessed a number of initiatives, three of which are of particular note: promotional outreach, improved selection process and a first retrospective review of the program.

The desire to stimulate a larger candidate pool for better choice of quality candidates, prompted the YCRA to adopt a pro-active approach to attracting applicants. The program broadened its publicity beyond the normal channels of the Deans of Graduate Schools, by placing advertisements in selected newspapers and circulating information within the development community (CIDA, NGOs, etc.).

The selection process was tightened up with the introduction of an evaluation grid, allowing for some standardization of the basic criteria for selection. Applications were now reviewed, rated and endorsed by the appropriate IDRC division, with the final decision being left in the hands of the YCRA selection committee.

Recognizing that the CIDA Awards for Canadians was in effect a companion investment in Canadian capacity building for development, the YCRA and CIDA entered a collaborative period in which they participated in one another's selection committees. This arrangement lasted until 1989, when the administration of the CIDA Awards for Canadians Program was contracted out to the Canadian Bureau for International Education.

Alongside these measures, FAD also commissioned a first retrospective review of the program to obtain a profile of recipients, to assess their view of the benefits of the program and to identify where additional changes might be made. The ensuing report, entitled "A Survey of Young Canadian Researchers," observed that selection criteria could still be improved to be more clear and fair. Survey findings revealed, for example, that only 51% of awardees were selected through open competition. Moreover, 61% of award recipients did not fall into the categories outlined in the promotional brochure. Many of the awards in the health sciences and agriculture fields were granted to individuals undertaking Master's degrees rather than PhDs. The report also noted that there was no discussion of the objectives of the program between the IDRC divisions involved in selecting candidates.

Some caution is required in interpreting the statistical findings of the survey, however, due to the disappointingly low response rate (35.6%). The survey had hoped to determine the extent to which awardees remained involved in international development and the extent to which their fieldwork represented a first exposure to a developing country. Unfortunately, results on these two points were inconclusive.

Nevertheless, the report did provide some good insights and food for thought which, combined with FAD's ongoing monitoring of the program, lead to a first round of major adjustments in 1986/87. These adjustments included:

- ☐ The extension of the PhD award to two years and up to a maximum of \$40,000 for outstanding PhD candidates. This modification was based on the recognition that research for a PhD thesis may require more than one "field season" (which is particularly true in the case of agricultural research).
- ☐ Official opening up of the award to the Master's level to accommodate applicants in the field of Communications. This decision was taken given that few programs were available in Canada in this field at the PhD level.
- ☐ The addition of two new fields of study (Civil Engineering and Architecture) to better reflect the thrust of the Cooperative Programs Division of IDRC.
- ☐ The introduction of a new category of award recipient: those involved with an IDRC-supported project. These awards were not subject to competition, but rather were nominated from among researchers already involved with IDRC-funded projects. (At least two Divisions, Health and AFNS, transferred funds to FAD to provide additional awards in their areas of concern.)

**1990/91:** The 1990/91 fiscal year introduced a second round of significant adjustments to the YCRA program, primarily to realign the YCRA with FAD's divisional mandate and to ensure greater coherence with the Division's other award programs. At this time a further objective of the YCRA program was formally adopted, that of linking Canadian and developing country expertise. New emphasis was placed on:

- ☐ The relevance of the candidate's proposed research to the priorities of the related program division at IDRC.
- ☐ A plan of recruitment, selection and follow-up to replace the competitive process. This approach included establishing linkages with the Canadian university community to identify suitable candidates. It included a more "mentoring" type of relationship between the candidate and IDRC divisional and regional staff. It also

included follow-up with awardees to ensure that the results of field research were incorporated into the IDRC knowledge base.

In addition to those adjustments concerned with realigning the program with FAD's divisional mandate, there were other significant program shifts that year:

- ☐ The inclusion of Canadian graduate students registered in developing country universities as eligible candidates for the award (this category of candidate was in effect on an experimental basis from 1990 to 1993).
- ☐ The elimination of the "young professionals" category of candidate and the decision to target solely academic candidates. This decision was made due to increased overlap with other awards (i.e., CIDA Awards) offered to professionals.
- ☐ The restriction of Master's level applicants to selected fields of study so as to avoid duplication with other award programs. These fields included health sciences, information sciences and environmental studies, fields which were not yet extensively developed at the doctoral level.
- ☐ The elimination of competition deadlines. Applications were now screened to ensure that candidates met all eligibility criteria; they were then evaluated by the appropriate IDRC division, which then made its recommendations. Awards were granted throughout the year.

**1992:** Two events are worthy of particular mention in 1992. First was the disbanding of the FAD and the transfer of certain activities to the Special Initiatives Program, which is responsible for the YCRA program to date. The second noteworthy event was the completion of a tracer study entitled "Survey of Former YCRA Recipients." This study was carried out in the summer of 1991 and represented the first comprehensive attempt to find out what award recipients thought of the program in which they had participated.

The individuals surveyed in the YCRA study had received their awards prior to 1990 and were thus subject to the eligibility guidelines in place at that time (i.e., many of the awardees fell under the "professional" category rather than the "academic" category of the award).

The YCRA survey drew the following conclusions: at the personal level, the award assisted individuals in their career and professional activities and helped them to establish networks of professional contacts in their field. The survey also confirmed the merit of the sensitizing role of the program. This was well summarized in one awardee's comment that the overseas experience "allowed recipients to develop a new perspective and understanding of the world that challenged the western perspective." At the institutional level, respondents commented

that they were generally satisfied with the support of the host institution in the developing country but were not as satisfied with the support of their Canadian institutions once they returned to Canada. Some commented that their organization was not taking advantage of their specialized skills and training.

**1993:** This year saw another wave of changes in response to the enlarged mandate and new structures within IDRC. At the United Nations Conference on Environment and Development in June 1992, IDRC was given the special responsibility of working with developing countries on the implementation of Agenda 21. This, along with new budget realities, led the IDRC to articulate a sharpened focus in a document called the *Corporate Program Framework (CPF I)*. It essentially charted the course for the period 1993-1996. It redefined priority program areas, incorporated a multidisciplinary approach and gave new emphasis to global and inter-regional development.

In line with the new IDRC, the YCRA refreshed its own goal:

"to contribute to the growth of research capacity in Canada in sustainable and equitable development by supporting Canadians at critical stages in their academic training to conduct research in sustainable and equitable development."<sup>3</sup>

Priority research areas were delineated in accordance with the Corporate Program Framework. As of 1993, applications were accepted for research in the six concentrated core themes on environment and development. In addition to this, seven more broadly defined fields corresponding to IDRC's program divisions were also eligible. The fields defined as eligible in 1993 are the same we see today:

#### Core Themes

- ☐ Integrating Environmental, Social and Economic Policies
- ☐ Technology and the Environment
- ☐ Food Systems Under Stress
- ☐ Information and Communication for Environment and Development
- ☐ Health and the Environment
- ☐ Biodiversity

**Programs for Sustainable and Equitable Development**

- ☐ Environment and Natural Resources
- ☐ Health Sciences
- ☐ Information Sciences and Systems
- ☐ Social Sciences
- ☐ Gender and Development
- ☐ Management of Innovation Systems
- ☐ Human Resource Development

Based on two considerations, applicants at the Master's level continued to be restricted to those individuals undertaking studies in the areas of Health Sciences, Information Sciences and Environmental Policy. Firstly, there was a feeling that these fields were still not yet well established at the doctoral level. Secondly, in the fields of Health and Information Sciences the Master's level was seen to be the more common point for career entry.

Recognition of the interrelatedness of the global community, resulted in a small number of awards being allowed for research to be conducted in countries in the North. These awards were reserved for any outstanding and innovative work whose scope could not be confined to countries in the South.

In addition to the shifts in eligibility criteria, selection criteria were also better elaborated in the evaluation form used for review and are indicated below:

- ☐ appropriate academic background to undertake research;
- ☐ previous academic standing;
- ☐ referee's assessment;
- ☐ previous overseas experience;
- ☐ language skills necessary to undertake the proposed research; and
- ☐ the appropriateness of the proposed affiliation with an institution in the developing country.

**1994:** By this time it is clear that the progression of the YCRA program is not linear. Selection procedures were once again adjusted, this time to respond to the increasing number of qualified award applicants. The YCRA reinstituted a deadline for receipt of applications and reintroduced a selection committee. Applications continued to be assessed individually by program officers within IDRC headquarters and by Regional Offices. When the number of

qualified applicants exceeded the funds available, however, a selection committee would meet to determine which of the qualified applicants would receive awards.

**1995:** An Impact and Institutional Affiliation Study of the YCRA was undertaken in February, 1995. Given that the program was now entering its thirteenth year, it was felt that many of the past award recipients were moving into the most productive years of their careers. The purpose of this study was thus to assess the impact of the award on past recipients and to determine how institutional affiliation could be better designed to benefit the awardee and the host institutions.

The study revealed that some individuals had already made outstanding contributions in their field. For example, a former recipient was awarded the Pearson Peace Prize for his work in medicine, while another was the leader of the relief mission of Médecins sans frontière in Rwanda.

#### **Summary**

The rationale of the YCRA (as described under Section 1.1) was reaffirmed and it was anticipated that by continuing to support particular individuals at critical times in their personal and professional development, the awards would foster the growth of a generation of future leaders in international development. Furthermore, it was felt that a focus on the younger generation of Canadian researchers would ensure continuity of the role played by Canada in matters related to Sustainable and Equitable Development.

### **1.3 Moving into 1996**

In this brief chronology of the program, what stands out is that the YCRA's essential core has moved forward into 1996 with the same spirit and rationale originally inspiring it. However, supporting this core was a rather more malleable set of program design elements. In an effort to be responsive to the internal and external environment, various program managers have brought about appropriate changes that were sometimes innovative, even experimental, and sometimes circular. The various surveys and studies commissioned by the program have made many suggestions, some of which were acted upon, others not. They remain a resource to be dipped into when needed, to refresh the stock of ideas for new directions.

From our review of the YCRA, it is also evident that there has been persistent deliberation over certain issues in connection with program design. These issues have surfaced, receded and resurfaced over the years. In the relay from one program manager to another, they seem to have worn away somewhat at the edges of program focus.

## **CHAPTER 2**

### **Analysis of the Current Issues**

While the basic rationale for the YCRA program may have remained constant over the years, there has been some loss of acuity in terms of how the program's design should reinforce this rationale. Overall design should be understood to include: program definition, award promotion, eligibility criteria, selection process, conditionalities and follow-up.

In this chapter we will examine a legacy of issues that has built up over the YCRA's lifetime. Often appearing as dichotomies, they have sparked animated debate in successive rounds of selection. The following issues were by and large self-diagnosed as being problematic by YCRA program management:

- ☐ To what extent should age be factored into eligibility or selection?
- ☐ How can prior developing country experience be reconciled with the program's goal of providing just such experience?
- ☐ How should the program deal with applicants wishing to do research in their country of origin?
- ☐ What other considerations might affect regions eligible under the program, e.g., the "Canadian window," Central and Eastern Europe?
- ☐ How compelling is the rationale to continue funding Master's level candidates?
- ☐ How closely should thematic criteria be defined?
- ☐ How rigorously should the program view candidates who have not met the requirement of securing affiliation with a host country institution at the time of application?

While the issues are phrased as questions, we make no pretension to providing ready answers. Rather, our purpose will be to elucidate the various sides of the issue at hand, and attempt to fold any insights into various elements of program design. To the list above, we wish to add another, which emerged with insistence in the course of our review. It is also the issue with which we propose to begin this exercise:



## 2.1 Program Definition

Program definition, or rationale, is taken as an issue in its own right because it is the building block which will determine both the shape and the coherence of design. By program definition we mean how one articulates the primary goal in relation to secondary or complementary goals. If this prioritization is only loosely conceived, it cannot be a lucid guide where difficult choices need to be made.

In 1982, the YCRA project summary stated that the program was established with the goal of "encouraging the involvement of young Canadian researchers in scientific areas of concern to IDRC and giving them, at the same time, exposure to problems of developing countries."

In 1996, the YCRA project summary stated that "these awards are intended to promote the growth of Canadian capacity in research on sustainable and equitable development."<sup>4</sup>

Interviews with several IDRC officers who have served as technical reviewers or selection committee members suggest that the 1982 description best captures the spirit of the YCRA program. We base this observation on the fact that interviewees consistently emphasized certain principles which can be easily discerned in the words: *encouragement*, *young*, *IDRC-related* and *exposure*. Such words set parameters to the broader goal of Canadian capacity building. Although the words still beg some qualification (i.e., how young, what kind of encouragement), they do provide initial reference points against which various program criteria can be tested for "fit."

By contrast, the 1995 description is broader, more inclusive. In theory, this opens up the range of possibilities. In practice it would seem that the original principles have merely gone underground as tacit preferences which are then challenged as new perspectives emerge. At the same time, since the later program definition contributes little to a prioritizing framework, some very fundamental issues lapse into a dialectic tension which hampers consistency in decision making. Such is the case for example when one reviewer assumes that research quality should have primacy in judging candidates and another assumes that the YCRA program is about process, not product. Many issues to be discussed below have this dialectic character, and indeed in some respects this is inherent in the judgement calls required by the selection process. However, the danger is that a "drift factor" tends to set into the program's rationale, at a time when sharpened goals and streamlined methods are the imperatives of the day.

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4. We grant that this is not the only description of the program in circulation today. However, the comparison does allow us to make an important point.

In between the 1982 and the 1996 project summaries are many other documents which highlight this or that aspect of what could be considered as YCRA goals, and to this have been added others from IDRC staff. The list is extensive; differences are sometimes nuanced, yet revealing for our purposes:

- ☐ to encourage careers in international development with special consideration for a) equity and youth, and b) priority areas as outlined in the Corporate Program Framework of the Centre;
- ☐ to sensitize and encourage young Canadian scholars to become engaged in the problems and realities of international development;
- ☐ to provide an introductory experience in a developing country;
- ☐ to foster possibly useful research by young Canadians;
- ☐ to disseminate, if not utilize, research results in the developing country;
- ☐ to enhance certain neglected fields of relevance to international development;
- ☐ to emphasize to the upcoming research community that applicability is an essential part of development research; and
- ☐ to give IDRC greater visibility within Canada.

#### **Summary**

For program rationale to be a guiding force rather than an agent of inconsistency, it will be important to establish some kind of hierarchy among these goals. What supersedes what? A closer definition of program objectives will enable the designing of a program that is both efficient and effective. As evaluators well know, this is the starting point for charting the progress of any program. Moreover, we will see that this issue recurs again and again as the root cause of other issues awaiting resolution.

## **2.2 Using Age as a Criterion**

The title, *Young* Canadian Researchers Award, sets up certain expectations which are worth exploring. For many within IDRC it has an upbeat ring, defines the target group and carries the appropriate overtone of nurturing a new generation of researchers in international

development. Others feel that the word "young" may be true to the spirit of the program but peripheral to its functional reality, namely funding graduate level thesis research. In the absence of any age restriction, some older applicants have interpreted the word as elastic enough to accommodate them alongside others close to half their age. At the same time, some of the older awardees consulted for this review confessed to mild feelings of guilt or hesitancy in applying (and receiving) an award earmarked primarily for the next generation. We can reasonably assume that still other older students screen themselves out, naturally accepting the terms and intent of the program as defined by its title. One might even assume that for some of that group, the impulse to disregard the "age hint" might be held in check by a sense of social responsibility towards the younger generation.

Views from younger awardees are also revealing on the subject. Some of the awardees consulted were not even conscious of the fact that "young" appeared in the title of the award, in distinct contrast to others of more mature age who never fail to notice such a descriptor. A number of awardees found the word "young" offensive or condescending, particularly in view of the fact that they are on the threshold of self-sufficiency. This somewhat anecdotal collection of views on the title of the award nevertheless points out that:

- ☐ the title should clearly reflect the primary objective of the program; and
- ☐ the title should be consistent with eligibility criteria.

Before reaching any conclusions about the title of the award, however, it is necessary to analyze the issue of age and how it has affected the YCRA program to date.

As mentioned previously, those consulted within IDRC definitely see the award as supporting the young, upcoming generation. However, viewpoints range widely on whether an age limit should accompany the word "young" and what that age limit should be. ***Some categorically advocate 30 as a limit, some 40 and some others would open the competition to anyone young in career, up to reasonable but unspecified limits.***

Under *Eligibility*, current promotion materials state that "preference will be given to applicants in the earlier stages of their career." This wide definition of "young" tends to side-step the question of whether or not there is some tacit form of age restriction that is or should be operative at the selection stage. The fact that age is not clearly resolved at the eligibility stage, shunts an added burden of decision-making onto the selection committee which then debates the issue repeatedly through successive rounds. In the final analysis, outcomes tend to be somewhat idiosyncratic, depending as they do on the viewpoints and arguments advanced by selection committee members of the day. This is not to deny that there are excellent arguments supporting all shades of the debate and it is important to note these for

the record. The following will illustrate arguments advanced by those who favour setting age limits and those who favour a more open-ended interpretation:

#### Age Restriction

- ☐ Be consistent with title
- ☐ Generation X chronically disadvantaged
- ☐ Help young make the "leap of faith"
- ☐ Emphasis on young is politically timely
- ☐ Support a new generation
- ☐ Weaker income capacity and resources
- ☐ Need the experience
- ☐ Return on investment over a longer time

#### Age Elasticity

- ☐ Youth exclusivity is discrimination
- ☐ Demographics: more old people, more active, living longer
- ☐ Career shifts due to downsizing
- ☐ Number of women returning to study or work after child-rearing
- ☐ Added wisdom and experience for quality research
- ☐ Return on investment faster because of maturity

At this point it may be useful to consider advice received from the Canadian Human Rights Commission: *if significant benefits are conferred by the program, as is the case with the YCRA, an explicit restriction based on age would be open to challenge. Age can only be requested for statistical, tracking or equity reasons, not for purposes of discrimination.* In other words, one may target a certain age population if this is built into the rationale of the program, but one cannot actually insist that candidates give their age. It is further recommended by the Commission that statistical or tracking data be entered on a cover sheet which can be detached from the proposal to be evaluated. Essentially this would mean that the selection process would be done blind, a practice which is common both in academic committees and selection committees of comparable award programs. *A number of academics consulted on this point indicated that they knew of virtually no selection process that was not done blind with respect to aggregate criteria such as age.*

*Significantly, of some eight comparable award programs examined for this review none restrict age either explicitly in eligibility criteria or tacitly in selection.*<sup>5</sup> Like the YCRA, these programs fund Master's or PhD level research and have as their objective to attract new blood to careers in designated fields. *The common view is that level of study sufficiently defines the targeted population for capacity building purposes.* The most promising candidates are simply those with the best quality of proposal. By the same token none of these programs carry the word "young" in their award titles, preferring to emphasize the functional aspect of the award, namely Master's or PhD level research in such and such a field. One of them had briefly considered inclusion of "young" in the award title but rejected

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5. Small exception: the Department of Foreign Affairs and International Trade is responsible for a number of international youth exchange programs which target individuals between the ages of 18 and 35 and set age limits accordingly.

the idea as being too problematic, for reasons reminiscent of YCRA's current struggle with the word.

At the moment the YCRA program is sitting on the fence between two options:

- ☐ either joining the fold of comparable award programs and going genuinely "ageless," or
- ☐ targeting a desired age group more purposefully.

In a sense the distinction between the two options is fairly nuanced because both require supporting text that will clearly convey the program's intent of replenishing the stock of Canadian researchers. Once stated however, the first option lets the die fall where they may. ***Even with the second option we would strongly recommend that the issue not be revisited at the selection stage.*** This means that the wording would then have to give a more pronounced nudge in the desired direction. An appropriate wording to close down the age range might be:

"this award was designed to foster a new generation of researchers in international development. As such it will be of greatest interest to individuals between the ages of x and y, who are still in the early stages of their career development."

In this case we ask again what x and y should represent. It may be helpful to look at the age distribution of Master's and PhD students at Canadian universities, as provided by the Association of Universities and Colleges of Canada for 1994. The following table compares the 1994 AUCC data with age distribution data for YCRA awardees from 1991 to 1996.

# AGE DISTRIBUTION BY LEVEL OF STUDY

## All Canadian Universities, 1994

## YCRA awardees, 1991 to 1996

Age	Master's	PhD	Master's	PhD
18 to 21	0.5%	0.0%	0.0%	0.0%
22 to 24	28.6%	4.2%	8.1%	0.0%
25 to 29	36.2%	34.5%	51.3%	29.4%
30 to 34	15.8%	30.9%	27.1%	30.8%
35 to 39	8.8%	15.6%	13.5%	20.7%
40 to 44	5.4%	7.8%	0.0%	8.8%
45 to 49	3.1%	4.4%	0.0%	7.4%
50 to 54	1.1%	1.8%	0.0%	2.9%
55 to 59	0.3%	0.5%	0.0%	0.0%

*From this we can see immediately that an age limit of 30 would not be realistic as it would eliminate close to 60% of the PhD candidate pool, and even 34% of the Master's candidate pool.* An eligible age range extending to 40 would be more reasonable as it would capture close to 85% of the available PhD pool and 90% of the Master's pool. YCRA awardees at the Master's level are well above the modal age range of the broader Master's population; Phd awardees are slightly below the modal age range of the broader PhD population, though rising higher on the tail end. From 1991 to 1996 roughly one in five PhD awards went to candidates aged 40 and over. Although modal and median ages were calculated for the combined number of PhD and Master's awardees from 1991 to 1996, the period is too short to show any significant trend and not necessarily that revealing given the length of the tail for the PhD curve.

### Summary

In view of the fact that none of the comparable award programs are concerned with age, in spite of their similar desire to foster a new generation of researchers and, given the age distributions discussed above, we are inclined to recommend that age not be used as a criterion of eligibility or selection. What is most important, however, is to make a decision that will liberate the selection committee from having to factor age into decision-making. Whether the program opts to open the competition completely to all age groups or to target say the 20-40 age range with the appropriate wording in promotional material, we would recommend that a candidate's age be kept separate from proposal documentation to be reviewed.

A word of caution, any restriction of eligibility by age should be cleared through IDRC's legal counsel.

## 2.3 Goal of Exposure Versus Merit of Prior Experience

Experience, a corollary of age, has its own dynamic as an issue. To the extent that prior experience in a developing country can contribute positively to a candidate's profile, it can also be at odds with the program's intent of giving new researchers the opportunity of exposure to a developing country. If the hierarchy of program goals is not well established, exposure and experience work at cross-purposes with each other.

For example, if the YCRA program rationale puts a priority on high quality of research **product**, then developing country experience can be expected to weigh heavily into the balance during selection. Experience can account for stronger, more mature proposals and predispose better research outcomes. This is particularly true given the new multidisciplinary framework, on top of which there is the international context which requires cross-cultural awareness and sensitivity. The development problematique itself is complex, especially in areas at the cutting edge of socio-economic thought. It requires a breadth of thinking that a purely academic background is not likely to provide. After 30 years of lessons learned in development, the world is moving to a new philosophy of aid which recognizes, among other things, that development must be people-centred and participatory. This means that all researchers should keep an eye on applicability and ultimate beneficiaries, if the research is to have any pretension to being development related. If a candidate proposes to do community research then cross-cultural interaction and communication skills are pivotal. Prerequisite to that is knowledge of the local language and understanding of the local context in all its social, political, economic and cultural aspects. ***In short, prior developing country experience might be expected to enhance an awardees ability to adapt quickly, interact effectively and perform optimally in the new environment. In this line of thinking, IDRC would remain***

*true to its identity as an advanced research promoting institute. As with any project assessment, it is ultimately the quality of a candidate's research product that will be judged.*

We now invoke the other side of the dichotomy and ask if it is not research **process or learning** that should be the targeted output of the program, rather than research product per se. If the YCRA program definition prioritizes giving promising Canadians the exposure they need **to gain competence** in development research, then favouring those with prior experience overseas can subvert the program's intent. The situation would tend to parallel the vicious circle in which young people find themselves today: unemployed because inexperienced and inexperienced because unemployed.

The 1982 project summary is quite clear in expressing the YCRA's goal of providing an opportunity for practical involvement and exposure to candidates as a way of attracting them to a development research career path. The 1992 Survey of YCR Award Recipients reaffirmed the sensitizing merit of the experience for awardees. According to the report, recipients gained an awareness of some concrete realities in development work. They gained research and interpersonal skills, as well as theoretical and substantive knowledge. To quote one awardee surveyed by the 1995 Impact and Institutional Affiliation Study: the award "provided me with the opportunity to test the waters in the field of international development."<sup>6</sup> This study reported that 87.5% of respondents considered the award to have contributed significantly to their professional growth.

*Without having been deliberately supplanted by other goals, this original objective is sometimes eclipsed by the allure of exceptionally good research product.* It is important to remember that the real "hook" for development commitment is first hand experience in a developing country. Awardees consulted for this review also stressed that the award gave them the confidence to venture into a field that might otherwise have been too daunting. The "leap of faith" required of an inexperienced student is arguably greater than that of an experienced one and, as such, perhaps more deserving of support if the purpose of the award is to bring fresh blood into the research community.

At the moment, the YCRA program resorts to flexi-language in the hope of keeping a foot on both bases. Current eligibility criteria state that: "Preference will be given to applicants who are in the earlier stages of their career, and who have limited developing country experience." The merit of this wording is that it is realistic in recognizing that there is likely to be quite a mix of experience in the student body from which applicants are invited.

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6. DaSilva, Christian M., *Impact and Institutional Affiliation Study of the Young Canadian Researchers Award Program*, International Development Research Centre, Ottawa, Ontario, 1995, p. 4.



Academic advisors consulted for this review confirm that today's students are taking education in bite-sized portions interspersed with work, volunteering or travel experiences. Certainly the long tail of the Master's and PhD level age distribution curve discussed earlier would tend to corroborate this view. Other supporting data comes from the Canadian Association for Graduate Studies' tabulation of the mean number of months to completion for a part-time Master's student, as compared to a full-time student. The former can take from 6.8 years to 14.5 years longer than the latter, depending on the discipline. This is significant when one considers that part-time Master's enrolments have nearly doubled from 1974 to 1994. ***In other words, students are not following a linear path from high school to PhD.*** Moreover, for those that have an early interest in developing countries, there are a number of work, volunteering and exchange opportunities available through such organizations as Canada World Youth, Canadian Crossroads International, Volunteer Forest Conservation in Costa Rica, Grenada Foundation for Field Research, Agricultural and Rural Development Work in Sierra Leone, Interculture Canada, AIESEC, Canadian Society of Civil Engineers, Nova Scotia Gambia Association, to mention only a few. ***CIDA currently supports 20 to 30 programs that provide experiential learning opportunities in the South for some 2,000 young people annually. Indeed, it is worth remembering that the 1995 Impact and Institutional Affiliation Study reported that 93% of respondents had prior overseas experience.***

At the same time, there is no clear consensus among faculty advisors or youth program managers about whether the supply of overseas opportunities adequately meets the demand. The International Year of the Youth consultations in the mid-80's suggested that the demand for such opportunities from youth, universities, colleges and NGO's is overwhelming. A recent study supported by IDRC entitled "Undergraduate Development Studies Programs in Canada: A Generation of Scholars and Practitioners" surveyed eleven programs, seven of which had experiential options available for the students in the form of internships or practicums outside Canada. ***The report highlighted field experience abroad for students as a key strength of existing programs, but also as one of the main areas needing improvement or expansion.*** These programs consider it essential that students have an opportunity to globalize their perspectives outside the classroom.

In short, while the YCRA's use of flexi-language is realistic and casts a wide net to assure a larger candidate pool, there is a downside to the wording "limited development country experience," in that it is a prolific source of ambiguity ***both for applicants and for proposal reviewers.***

Technical reviewers and selection committee members from year to year make individual assumptions about the YCRA's hierarchy of goals. ***In the absence of a more authoritative and collectively shared understanding of what to prioritize, a different premise can inform their decisions when it comes to weighting something like prior experience in a developing***

*country. One reviewer may be assuming that research product has primacy, while the other may be assuming that research process has primacy.* At times the distinction may be nuanced, but there have been striking examples of technical reviewers recommending candidates who are subsequently rejected by the selection committee, and vice versa. While this is partly because the selection committee has the advantage of seeing the total pool of candidates for a comparative assessment, it is also partly because there is not a shared understanding of what constitutes the ideal candidate. Again, if there is fuzziness in the hierarchical order between goals, then reviewers cannot be expected to know if they are to harvest quality green fruit for ripening in transit or ready-ripe fruit for on the spot consumption. The indicators of quality can be quite different in the two cases.

It is equally important for the applicant to know what selection committees are looking for. Indicating preference for "limited" experience throws into question whether they should emphasize their experience or lack of it, whether it will be counted as an asset or a liability. In fact, this contradiction is subtly reflected in the application form submitted by candidates and the evaluation form used by reviewers. The application form asks candidates to state their experience and previous travel abroad, as if this contributed to their strength as candidates; yet, if either was in a developing country then it must also be "limited." The Evaluation Form and Reference Statement ask for comments on the ability of the candidate to carry out the proposed research; one would assume that prior developing country experience would be noted here. *According to reviewers interviewed, some applicants have been rejected, at least in part, as having too little experience, while others have been rejected for having too much; it is unclear to what extent there has been consistency in drawing the line between the two.*

The scope of this review did not allow for an analysis of applicant and awardee files to determine how much and what kind of experience the candidate pool had to offer. However, *what would seem to be important is to shift the focus away from whether a candidate has any prior experience to what that experience reveals about the candidates personal suitability.* It may be worth citing here a 1989 study entitled "Criteria for Granting Research Training Awards to Graduate Students." Published by the Medical Research Council of Canada, the report found that certain "soft" variables like investigative personality (critical, independent, inventive and inquisitive) and focused energy personality (determined, organized, energetic) were better predictors of successful researchers than either academic standing or prior summer research experience in and of itself.<sup>7</sup> Interestingly, studies done for CIDA by D. Kealey on the cross-cultural effectiveness of technical advisors overseas also suggest that prior international experience per se is not as reliable a predictor of effectiveness as qualities

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7. O'Brecht, Michael and Pihl, Robert and Bois, Pierre, *Criteria for Granting Research Training Awards to Graduate Students*, Reprinted from *Research in Higher Education*, Vol. 30, No. 6, Medical Research Council, Ottawa, 1989, p. 659.

such as openness to others, motivation and drive, tolerance, political astuteness, cultural sensitivity and so on.<sup>8</sup>

### Summary

- ❑ There is evidence to suggest that many students can and do avail themselves of opportunities to travel overseas. We would therefore recommend eliminating the phrase about limited developing country experience, in the eligibility criteria. However, promotional material must be more forceful in describing the intent of the program so that those with extensive experience can screen themselves out, if that is the YCRA's intent.
- ❑ One section of the application form could ask candidates with prior developing country experience to clarify what the learning was from that experience, how it relates to the proposed research and what they think it indicates about themselves. Candidates without prior experience could be asked to describe the challenges they expect to face in doing research in a foreign environment and the personal qualities they feel will be required. They could also be asked to demonstrate what steps they have taken to prepare themselves for this challenge (e.g., language courses, area studies, cross-cultural communications courses etc.). In a sense this would level the playing field as it would allow both types of candidates to make their case on the issue, providing a better basis of comparison for reviewers.
- ❑ Some executive decisions will have to be made about where the YCRA program emphasis lies, so that reviewers can operate out of a common understanding. This emphasis should be reflected in both the promotional material and the application form.
- ❑ If the experiential goal of the award is still paramount, then a slight weighting might even be applied to the inexperienced applicant who demonstrates awareness of and preparedness for the challenges involved.

## 2.4 Country of Origin as a Location for Field Work

The country-of-origin issue parallels the experience/exposure issue and to some extent brings the dichotomy to a head. Awardees returning to their country of origin for field research

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8. Kealey, Daniel J. and Protheroe, David, *People in Development: Towards More Effective North-South Collaboration*, Canadian International Development Agency, Hull, Quebec, 1993, pp. 78-80.

have the advantage of knowing the local language and culture, which is in any case a necessary precondition for sensitive and effective research. The psychological and intellectual preparation is done in advance so that research can proceed more expeditiously. This is a distinct asset in comparison with someone who may spend half their research time acclimatizing to the new environment, struggling with a weak understanding of the local dialect or having to work through an interpreter. Having a foot in two worlds can also facilitate the kind of networking that YCRA hopes to see as a by-product of the field research. Furthermore, awardees can have a deep interest and often a dedication to the cause of development in their country of origin. Such attitudes promise better research outcomes and long-term commitment. ***If the product of research has primacy in judging an applicant's merits, then country-of-origin must be viewed favourably, other things being equal.***

However, if the primary objective of the program is to give promising young Canadian scholars a unique opportunity to build experience through their overseas research, then it is only logical that relatively inexperienced candidates should not lose out to someone with extensive experience, other things being equal. At the outset of the program this emphasis seemed less equivocal than today. ***In consequence, a proposal to do research in a relatively familiar environment was more clearly seen to be redundant in benefit and running contrary to program objectives. It was also seen by some to insinuate an unfair element of competition if that familiarity was actually taken as an asset in judging the proposal.*** Another angle to consider is that in politically sensitive areas such as good governance, having one's origins in the country of research can be a handicap either because of one's unconscious biases or because of the ambiguity of local perceptions. We are told that even among anthropologists there is an unspoken code that research should not be done in one's country of origin.

Interestingly, in the course of interviewing IDRC staff, the country-of-origin debate came up quite spontaneously in every instance. An interview protocol circulated beforehand did flag this issue among others but, where a number of issues needed probing to emerge in discussion, this one rarely did. Views on the subject were very divided. It is a sensitive issue, particularly in an environment which is international in perspective and multicultural in composition. Opinion tended to split along the basic question of whether the YCRA is in the business of supporting research process or research product. ***The bottom line is that eligibility or selection criteria bearing on this issue must flow not from individual viewpoints but from the YCRA's definition of its strategic goals.***

Although the true locus of this particular debate is in the process versus product orientation of the program, there is a serious side-issue that has also caused some distress of focus and must be signalled here. A few cases exist in the history of the program where YCRA funds were used to return to the country of origin not just to do the field research but as a vehicle for

permanent departure from Canada. It is clear that such an outcome sabotages the program's goal of building Canadian capacity in international development research. What the program must ensure is that the selection criteria are strong enough to minimize the risk of this type of manipulation. Indicators such as credits, quality of proposal, research topic, statement of career objectives can be carefully scrutinized to screen out dubious candidates. It should also be noted that the 1986 Survey of Young Canadian Researchers firmly rejected this lingering fear of abuse as being unfounded, reporting that of 26 respondents only three indicated that they were born in a developing country. However, the survey's low response rate (35.6%) and its neglect to establish how long those three individuals had been in Canada left the point rather moot.

A proper analysis of the prevalence of return to country-of-origin would require correlating birthplace with citizenship status, length of time in Canada and location of proposed field research for all applicants and then identifying which of them actually received awards. Such an exercise is beyond the scope of this review since the YCRA database is not yet set up to make these correlations, in addition to which birthplace is not recorded on application forms and would require consulting proof of citizenship documents. A cursory scan of records from 1991 to 1995 however shows that of 89 awardees nine were landed immigrants; of these five did their field research in the country of their citizenship, two in the same region and two on the same continent. ***All that we can deduce from such partial data is that, yes, there is more of a tendency among landed immigrants to return to familiar territory rather than branch out to other regions for their research.*** The applicant list for 1995 shows that of the 43 who applied, three were landed immigrants, all three proposing to do research in the country of origin and none of them receiving an award. In the comments column, reviewers noted if the proposal was for country-of-origin fieldwork, but it is not entirely clear whether this fact influenced their judgment.

Under *Eligibility* current promotional materials state that "for those applicants who have settled in Canada from Asia, Africa, or Latin America, preference will be given to research in a developing country other than the country of origin." This wording attempted to come to grips with the persistent concern within IDRC that too many recent immigrants were wanting to do research in their country of origin, to the detriment of the program's primary intent. However, some within IDRC found this wording inappropriate on the level of human rights. Imposing a condition of eligibility on some Canadians and not others was not only thought to be offensive but also to run afoul of the policy and spirit of multiculturalism. There was also concern that affected minority cultures might perceive such eligibility criteria as constituting systemic barriers.

In discussing this issue with SSHRC, we learned that similar concerns had prompted the program to stipulate that doctoral awardees, who were proposing to do research in their country of origin, must provide proof that they would be employed in Canada upon return.

An awardee took SSHRC to Federal Court, claiming restriction to entitlement on citizenship grounds. SSHRC lost the case and dropped the requirement from its eligibility criteria.<sup>9</sup>

By way of comparison, the CIDA award for Canadians restricts eligibility to Canadian citizens, so that the more blatantly inappropriate use of the award for research in one's country of origin is pre-empted as an issue. When this decision was made, both principle and bureaucratic streamlining were invoked for rationale. In the first place, permanent residents cannot legally leave Canada for periods exceeding six months without special dispensation, whereas the program encourages the type of research outcome that presupposes more lengthy fieldwork. Before the restriction was applied, this kind of mismatch did in fact hamper administrative process. In the second place, of the total amounts spent on training and awards for individuals from developing countries, this award represents a tiny fraction earmarked specifically to enhance *Canadian* capacity. It was felt that citizenship was a more reasonable measure of long term intent. *What we were not able to ascertain was whether the CIDA program had officially cleared this eligibility restriction through legal counsel.*

#### Summary

If a complete and transparent restriction expressed under eligibility is not acceptable, then YCRA must decide if it wishes to assign a weighting scheme at the selection stage which either favours or prejudices fieldwork in the country of origin. To maintain transparency, it would be important for promotional materials to phrase the issue in a positive construct that emphasizes the program's desire to foster a broadened, cross-fertilized regional or global perspective, rather than country focus per se. It is topical to note that the UNDP identifies, among the failures of ODA, what it calls the "country-focus failure." This means that ODA has been allocated to countries rather than development challenges that may transcend borders. In some measure that recognition underlies the more thematic approach to development taken by IDRC.

If promotion materials flesh out this vision adequately, then candidates with extensive prior experience in a developing country can be invited to re-invest their insights and experience in another culture, to test their metal as researchers in a cross-cultural context. Having stated the program's intent in this way, it would be reasonable to indicate that selection committees will be looking for evidence of such capability in proposals.

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9. Pearkes versus Her Majesty the Queen, T-2602-92.

## 2.5 Canadian Window

Although the YCRA's promotional materials do not mention the possibility of doing research in Canada or any other country of the North, the phrasing "Normally, such research is conducted in Latin America, Africa or Asia" does leave a door open to anyone wishing to make a case for being the anomaly. Some applicants have proposed multi-country research including Northern locations and, if their proposals had exceptional merit, became successful anomalies. The term "normally" reflected sympathy for an extended understanding of the concept of development, without committing to any firm policy that would need to be expressed under eligibility. In other words, development issues can be international in character in that they transcend borders or can be domestic, meaning that Northern countries can be afflicted by some of the same dilemmas as Southern countries.

The urgency to raise IDRC's profile in Canada, combined with this recognition that the development problematique has resonances in the Canadian domestic realm, spawned the rather creative idea that one YCRA award might formally be made tenable for research conducted wholly or partially in Canada. Excellent arguments were advanced for pushing the frontiers of what might be possible in the YCRA program, emphasizing the interconnectedness of North and South through the "Canadian window."<sup>10</sup>

A good case in point appeared in the AUCC's March, 1996 Issue of *University Affairs*. The article in question highlighted two University of Waterloo Researchers who had developed a simple water handpump for developing country use, inspired by the resourcefulness of the region's Old Order Mennonites who shun most forms of modern technology. A dramatic account of the accomplishment was filmed for *Heritage Minute* which was broadcast on television and movie screens across Canada. The Canadian link in this case was not only beneficial to the South, but also gave tremendous publicity mileage to the initiative in Canada.

Whether some of the more complex development issues facing the global community are truly served by Canada-based field research, however, is a moot point. ***Most IDRC staff consulted for this review expressed reservations about the applicability of Canada-based research to Southern development issues, feeling that the relationships are too superficial to warrant serious consideration.*** The 1993-1995 Study of Undergraduate Development Studies Programs in Canada<sup>11</sup> mentions that a slim majority of instructors — six in ten — do not use Canadian examples in their courses. This is a rather equivocal finding, however, in terms

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10. Chris Smart e-mail of February 5, 1996 to Pierre Beemans.

11. Einsiedel, Edna and Parmar, Aradhana, *Undergraduate Development Studies Programs in Canada: A new Generation of Scholars and Practitioners*, University of Calgary, 1993-1995, p. 38.

of the support it might lend to the Canadian window argument. Aside from the small sample size, it may suggest that instructors themselves are still in a "their problem" mode, or that area case studies are quite legitimately more pertinent to development study at the undergraduate level. Interestingly, most of the YCRA awardees consulted felt that there should be some opportunity to do at least part of their fieldwork in Canada, provided that a clear link can be made with how the research relates to development issues.

Notwithstanding the appeal of a Canadian window experiment, the authors of this review would now like to bring a few arguments to bear against it. The foremost of these must be predicated on the YCRA's fundamental objectives. ***If the experiential aspect of the YCRA program remains a vital part of its raison-d'être, there can be no question that that objective will not be met by Canada-based field research.*** UNDP's increasing focus on "bottom-up" development suggests that thinking has to be people-centred and allow for working closely with community groups, NGO's and other Southern partners.<sup>12</sup> An expression of this vision in the YCRA program is the requirement of affiliation with a host institution, which allows the awardee to be part of a team, the Northern half of a North-South equation. For a young researcher, especially coming from a specialized discipline, this must surely be the heart of the learning experience being promoted by the YCRA.

***It should also be kept in mind that there are other scholarly exchange programs that could potentially accommodate Masters and PhD students interested in doing development research in the north.*** To mention only a few, these include: The Canadian Commonwealth Scholarship and Fellowship Plan, The Foreign Government Awards for Canadians, Rotary Foundation Scholarships, The Fulbright Program, as well as Canada's three Federal Granting Councils. The newly established North American Mobility Program and a parallel arrangement between Canada and the European Union, will also foster a globalizing perspective for students, through institutional linkages.

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12. United Nations Development Programme, *Beyond Aid: Questions and Answers for A Post-Cold-War World*, New York, 1995, p. 9.



### Summary

IDRC is unique in its concept and practice of partnership between North and South. The arguments in favour of a Canadian window are intellectually and strategically attractive, but are they philosophically congruent? Wholly Canada-based research may blur the edges of where the YCRA has added value as a funding program. On the other hand, allowing for a Canadian window may well be on the leading-edge of thinking on the very nature and interpretation of development. The Canadian window could reflect the call for domestication of foreign policy and acknowledge the international dimension of national issues.

To reconcile the appeal of a Canadian window with the need for program focus, we would suggest that such an inclusion be considered experimental. After a maximum of two years, the concept should be reassessed in the context of YCR Award program objectives.

## 2.6 Central and Eastern Europe

At the present time, Central and Eastern Europe fall outside the regular scope of IDRC initiatives. With the exception of the "-stans" and countries of former Yugoslavia, the region is not represented on the DAC's<sup>13</sup> list of countries eligible for ODA, nor are they on CIDA's list of countries ineligible for political reasons. ***In terms of the YCRA and the CIDA Award for Canadians, therefore, they are in something of a limbo but considered more or less ineligible.***

CIDA, however, does manage a dynamic program of cooperation with some 11 countries of Central and Eastern Europe, to assist them in their transition to democracy and a market-based economy. Canadian economic, political and security interests in the region will no doubt increase the flow of support, as countries demonstrate commitment to reform agendas. The sooner Eastern and Central Europe stabilize economically and politically, the sooner they can shoulder a responsibility in the international community's efforts to build a sustainable and equitable world. "In the long term, Russia and countries in Eastern and Central Europe could be prominent in the donor community. One reason for timely and generous help to these countries is that in time they will be able to help countries poorer than themselves."<sup>14</sup>

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13. Development Assistance Committee of the Organization for Economic Cooperation and Development.

14. Commission on Global Governance, *Our Global Neighborhood*, Oxford University Press Inc., New York, 1995, p. 197.

### Summary

We are not in a position to judge IDRC's eventual disposition with respect to Central and Eastern Europe. However, since eligibility criteria do not explicitly mention ODA countries and indeed invite speculation with the word "normally," it is not surprising that the YCRA has already begun to receive enquiries about Central and Eastern European sites for fieldwork. We would like to flag that, as the landscape changes, the issue of Central and Eastern Europe might have to be lifted out of limbo with a clearly articulated policy on eligibility.

## 2.7 Rationale for Master's Level Funding

Whether the YCRA should fund Master's level students or exclusively PhD level students is the subject of yet another vigorous and long-standing debate amongst those within IDRC who have been associated with the program in one capacity or another. To illuminate the matter, what we need to ask is whether the rationale for opening the competition up to Master's level is as compelling today as it was originally, and whether there is any duplication with other award programs.

From its inception, the YCRA program envisaged doctoral level recruitment as the cornerstone for building the new generation of scholars in international development. However, subsequent years saw a gradual infiltration of Master's level awardees, justified informally on various grounds, on an ad hoc basis. File review suggests that, in an effort to compensate for the insufficient number of suitable candidates at doctoral level, rules were sometimes "adjusted" so that funding allocated for the program could be disbursed. According to a recipient profile reported in the 1986 Survey of Young Canadian Researchers, only 33% of awardees had actually been at the PhD level from 1982 to 1986, with 13% of awards going to Master's level, and another 54% to a special Medical Health Exchange Programme and other non-graduate training arrangements.<sup>15</sup>

After this survey, what was informal practice became official policy with the opening up of the YCR awards to the Master's level in selected fields. The issue was revisited in the 1992 Survey of Former Award Recipients which recommended limiting the eligible fields to the three we see today, namely Health Sciences, Information Sciences and Environmental Policy. The rationale for these changes at the time included:

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15. Doherty, Patrick, *A Survey of Young Canadian Researchers*, International Development Research Centre, Ottawa, Ontario, 1986, Annex 1, p. 9.

- i. the anticipation that a larger candidate pool would improve the chances of high calibre research proposals from which to chose;
- ii. a recognition that these new and emerging fields were vital to development but were still thinly represented at the PhD level; to some extent, Master's was also seen as the logical exit point from academia, given the immediate applicability in the marketplace of degrees in these fields;
- iii. a suspicion that Master's level might be a more critical juncture for career choice than PhD; and
- iv. the existence of a gap in international development research at the Master's level, given that YCRA's closest comparable, the CIDA Award for Canadians, emphasized practical work/study attachments and on-the-job training.

We will look at each point in sequence.

*i. Larger Candidate Pool*

As the YCRA program matured, the volume of applicants for the award did see an increase although the pattern was somewhat erratic. In general we can say that the number of awardees in relation to the number of applicants moved from an almost compliant 1:1 to a more competitive 1:3, occasionally even 1:4 (e.g., 1995). The last round of selection (1996) however fell back to a lower ratio with 20 awardees accepted out of 30 applicants. Coincidentally, the ratio for CIDA's award for Canadian Master's students is more consistently 1:3.

An increase in the sheer number of applicants of course does not guarantee an increase in their suitability. We know that in some years the full complement of available awards was not granted because the quality of proposals was simply considered inadequate. Nevertheless, it is worth noting the more competitive success ratios of some comparable awards while keeping in mind that the "catchment" of Canadian international development awards is naturally smaller than in broader fields. In Canada, graduate research awards from MRC run a 1:10, from SSHRC 1:6 and from CMHC (now discontinued) the ratio was typically 1:8. In some respects these awards are more competitive than what the ratios reveal because applicants for some of these programs have already been pre-screened through the Faculty of Graduate Studies at their universities, so that only the top candidates actually get to the formal application stage. This is particularly true for NSERC and SSHRC awards. In the United States, the Social Science Research Council's MacArthur Foundation Fellowships and Africa Dissertation Fellowship are even more briskly competitive with success ratios more in

the range of 1:22. These are massive granting institutes with high profile and prestigious awards.

If we concur with the idea that competitive process stimulates efficiency, innovation and quality within a fair playing field, then such ratios can be meaningful. What can be extracted from this is that *the inclusion of Master's level candidates did modestly increase the overall size of the candidate pool, to the modest benefit of competitive process.*

That being said, however, *opinion on the quality of applications is very divided* among reviewers and selection committee members within IDRC. This stems partly from the variable range of sophistication and methodological rigour one might expect to find in a larger candidate pool, but also perhaps from the fact that the Master's and the PhD levels are considered together within the same pool. *Since there is no formal pre-allocation of award numbers by level of study, the two in essence compete head on with one another. In the absence of differentiating selection criteria, the contrast in the depth and substance of proposed research at the two levels can be more glaring.*

There is also a feeling, for example, that most Master's level proposals show weak understanding of development and insufficient language and culture preparedness. Compounding this is the perception that many Master's programs in Canada are not research oriented, in consequence of which much thesis work at that level relies heavily on literature and other secondary or even tertiary sources, rather than on primary data collection. If empirical work is the hallmark of true independent research and investigation, then it is understandable that the more elaborate PhD fieldwork design might dramatically outshine competing Master's proposals and, in fact, leave reviewers with very mixed feelings on the overall standard of the candidate pool.

The duration of fieldwork is also suggestive in this respect. It is generally conceded that an absolute minimum of seven to eight months overseas is required to achieve anything of significance, especially considering the initial expenditure of effort in practical logistics and orientation to the new environment. As one IDRC officer put it, with stays as short as three-four months we are talking about subsidized tourism masquerading as research. Indeed, putting this into a financial perspective, if fieldwork is limited then the dollar is not as well spent given that travel costs alone will absorb most of the award money. *As illustrated in the following table, 55% of the Master's fieldwork falls short of the seven-eight month minimum, while 87% of the doctoral level comfortably exceeds it:*

**CUMULATIVELY 1990-1996, LENGTH OF STAY OVERSEAS,  
BY LEVEL OF STUDY<sup>16</sup>**

<b>Length of Stay</b>	<b># of Master's Awardees</b>	<b># of PhD Awardees</b>
3 to 6 months	21	10
7 to 10 months	12	27
11 to 14 months	2	29
15 to 20 months	3	9
Over 20 months	0	4

Not reflected in this table is the fact that over 29% of Master's awards for the same period actually fell into the three-four month "subsidized tourism" bracket. *On the basis of fieldwork duration and the inferred calibre of research attainable, one might conclude that opening the award to this level has done little more than lower the common denominator for the new generation of international development scholars.* However, this would not be quite accurate because almost as many have undertaken fieldwork well in excess of what might be expected for that level. *Indeed some reviewers report that there have been some outstanding and dynamic Master's proposals* which could put the weaker doctoral proposals to shame. In these cases, it would seem a travesty not to foster individuals so compatible with the capacity building objectives of the YCRA. *At the same time, the YCRA may wish to carve out its niche carefully, so that its resources can be concentrated to best effect.* We will return to some of these points when discussing the sub-issue of duplication with other award programs.

**Mini Summary**

In short, inclusion of the Master's level has had modest effect on the goal of increasing the overall size and quality of the candidate pool. The findings really cut two ways. We will reserve opinion on how they should bear on the issue at hand, until the other points of rationale are examined.

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16. The duration of the award usually corresponds to the length of field research. 1995 data were not available at the time of writing this review. However, the trend is consistent enough from year to year to remain stable without the inclusion of 1995.

## ii. *Emerging New Fields*

To begin with, it is pertinent that these fields corresponded to program divisions within IDRC which have since lost their borders. Since Health Sciences, Information Sciences and Environmental Policy are so all-permeating in the sustainable and equitable development core themes of CPF I, one wonders if it makes sense to continue lifting them out in this way as single disciplines. CPF II is expected to further collapse the number of program initiatives and ***it will be important for any restriction of eligible fields at the Master's level to be defined in a manner consistent with the direction IDRC takes.*** Academics consulted for this review also suggest that many Master's level programs have evolved an interdisciplinary approach, particularly where there is an international focus. Furthermore, fields like Health Sciences and Environment by their very nature cross over various disciplines.

The three fields designated for Master's level have been described by members of the university community as "exploding" fields. This is evidenced both by enrolments at Bachelor's and Master's levels and the number of universities offering programs at both levels. For example, the 1995/96 AUCC Directory of Canadian Universities indicates that there are over 45 Bachelor level programs in Environmental Management and Environmental studies, and at least 19 Master's level programs in these same categories.<sup>17</sup> In 1994 there were 917 full-time and part-time Master's students enrolled in a category called Environmental Studies. Although Computer Sciences only partially overlap the YCRA's Information Sciences theme, it is worth noting that Master's level enrolment numbers for 1994 outstrip all but Electrical Engineering, within the Natural and Applied Sciences category.<sup>18</sup> The YCRA itself has funded some 49 Master's students from 1990 to 1996. ***The first cohorts will now have graduated and one can reasonably expect a small but distinct percentage to be progressing on to PhD level in related disciplines.***

For substantiation of the PhD picture, we again turn to AUCC's 1995/96 Directory of Canadian Universities. We find that there are now some four universities offering PhD programs in Public Health and Hygiene, eight in Epidemiology, one in Social and Preventative Medicine, five in Health Administration, six in Nursing, and so on. The same source indicates that there are five universities offering PhD programs in Environmental Sciences, two in Environmental Management and two in Natural Resource Management. In such disciplines as Information Sciences, Mass Communications and Library Sciences there are at least nine, while in computer sciences there are as many as 15.<sup>19</sup> ***Not unexpectedly***

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17. AUCC Directory of Canadian Universities, 30th Edition, 1995-96, pp. 311-312.

18. Canadian Association for Graduate Studies: Statistical Reports for 1994 and 1995, Carleton University, Ottawa, Ontario, p. 20.

19. AUCC Directory of Canadian Universities, 30th Edition, 1995-96, pp. 287-288.

*then, a preliminary scan of YCRA files also reveals a growing number of doctoral applicants in areas one could broadly describe as health or environment related.* Awardees in information sciences, on the other hand, remain somewhat under-represented at *both* Master's and PhD level, and this in spite of the dramatic amount of activity in that field.

#### **Mini Summary**

We must conclude then that the "new and emerging fields" argument is rapidly becoming less compelling than it might have been 10 years ago.

The companion rationale that Master's is a natural exit point for certain fields vital to development has validity, but bears scrutiny in terms of what logically follows from it. Co-existent with thriving PhD programs, there is the phenomenon of telecommunications companies hiring large numbers of computer science graduates straight out of Bachelors levels, detouring them from more advanced study. Some areas of health sciences are very practical in orientation, so that the preferred and final professional qualification is in fact the Master's. Students are also increasingly concerned with the bottom line, anxious to avoid being debt-ridden by too many years of cumulative study. Universities are observing more students returning for several Master's degrees in between work intervals, or topping up with skills-based certificate and diploma programs, in an attempt to position themselves better for the job market. All these factors do come into play in a student's choice to pass on the doctoral option.

Given Canada's traditionally modest investments in research and development, many students see teaching as the only career option for PhD graduates, this at a time when universities are in retrenchment. In terms of international development, students and instructors alike debate to what extent the field requires practitioners with a broad, interdisciplinary perspective, as opposed to PhD scholars. Some awardees have emphasized that doing a development related PhD is a tremendous commitment, given the uncertain returns and the financial pressures to exit academia. The YCRA award was seen as a pivotal nudge.

#### **Mini Summary**

If there are sufficient PhD programs available in these fields that are vital to development, and if IDRC holds that top quality professional research ultimately demands doctorates, then we are pushed to the logical conclusion that the "exit point" rationale actually argues for refocussing on the doctoral level. That is, the award can be used to help students to resist the temptation to exit at Master's level.

### iii. *Critical Juncture*

The "exit point" discussion would tend to suggest that it is the PhD level that represents a more critical juncture for attracting promising young people. The rationale behind targeting Master's level was originally based on observations from the 1986 Survey of Young Canadian Researchers that at the PhD level one does not attract individuals who are not already inclined towards development. A related thought emerged from the Impact and Institutional Affiliation Study of 1995, which reported that 90% of respondents had prior experience in a developing country, ergo inclination.<sup>20</sup> Coming from another angle again, a 1993-95 Report on Undergraduate Development Studies programs in Canada reported that 43.1% of student respondents choosing international development as a field of study were motivated by a personal interest in development issues.<sup>21</sup>

While these varied findings do suggest that early exposure to development enhances the chances of attracting more individuals to deeper involvement later, the conclusion that Master's level is a *more* critical juncture for career choice than PhD does not necessarily follow. Universities are increasingly emphasizing internationalization, moving out of the arena of rhetoric into real action by building this into their institutional mandates and actively seeking linkages around the world. Development issues are moving out of their ghettos and surfacing in a wide range of courses including International Business, Area studies, Political Science, Demography, Environment and so on.

#### Mini Summary

In other words, there is ample opportunity for students to be sensitized to the development problematique at any point through specific studies, travel and exchange opportunities or the ethos of the times on campus. Therefore it is not necessarily true that fostering a continuing interest is more important at the Master's level than at the doctoral level. Both represent equally critical junctures.

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20. DaSilva, Christian M. *Impact and Institutional Affiliation Study of the Young Canadian Researchers Award Program*, International Development Research Centre, Ottawa, Ontario, 1995, p. 4.
21. Einsiedel, Edna and Parmar, Aradhana, *Undergraduate Development Studies Programs in Canada: A new Generation of Scholars and Practitioners*, University of Calgary, 1993-1995, p. 41.



#### iv. *Gap Versus Duplication*

The gap in international development research at Master's level was of course filled by the YCRA's new policy to include that level. Therefore the question becomes whether, since that time, the evolution of the CIDA Awards for Canadians and the YCR awards has engendered any duplication between the two.

*The CIDA Award for Canadians has definitely shifted away from its earlier focus on practical attachments and nearer to the rationale animating the YCRA, namely the promotion of good research in the field. The YCRA, in turn, with its stress on the applicability of research, has drawn closer to the functional disposition characterizing the CIDA award.* Although there is still a residue of difference in emphasis and eligibility, the population targeted and the nature of the two awards are distinguishable only to a discerning eye. For most YCR awardees consulted, they merely represent two shots at the goal. A random comparison of the 1995 CIDA award recipients and 1995 YCR applicants revealed that there were *five* who had submitted their proposal to both programs. One can surmise that a look at the CIDA award applicant list over the years would unearth many more.

The 1992 Survey of Former YCR Award Recipients did however suggest that two-thirds of respondents felt there was prestige associated with the YCR award, especially if they were PhDs working in academia or research.<sup>22</sup> *In other words, judging from these responses, the YCR Award does subtly retain a certain image as an award for researchers as opposed to practioners.* That being said, it is increasingly accepted that applicable research and innovative practice are mutual contributors to the same end goal of advancing knowledge in a given field.

The CIDA award program looks for proposals that have realistic research objectives in alignment with CIDA's development priorities and strong support from a host institution. Applicability of research and identification of potential beneficiaries is an important adjunct. The award focuses on research that is holistic and project-styled in that development goals, impacts and beneficiaries are prime considerations. The CIDA awards program manager informs us that many of the Master's applicants are exceptionally strong, proposing lengthy, well conceived fieldwork and demonstrating commitment, initiative and understanding of development issues.

The reality of course is that however strong they are, the CIDA awardee has the same probability of achieving "impact" as the YCR awardee has of producing breakthrough research, or vice versa for that matter. *Considering that a research-inclined CIDA Master's*

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22. Ekos Research Associates, Inc., *Survey of Former YCR Award Recipients*, International Development Research Centre, Ottawa, Ontario, 1992, p. 16.

***awardee can always proceed to being a YCR PhD awardee, does the subtlety of distinction in rationale for the two programs really warrant their running on parallel tracks?***

In 1995, CIDA supported field research in developing countries for 25 Canadian Master's students. Proposals covered a wide variety of sectors and themes, roughly grouped as follows: 25% in health and related sciences, 25% in environment and related sciences, 25% in business/economics and related sciences, and 25% in social sciences (including community development and women's issues). Most proposals were multidisciplinary.

In addition to the five applicants who submitted their proposals to both programs, there are striking similarities in proposal topics submitted by *awardees* of both programs in 1995:

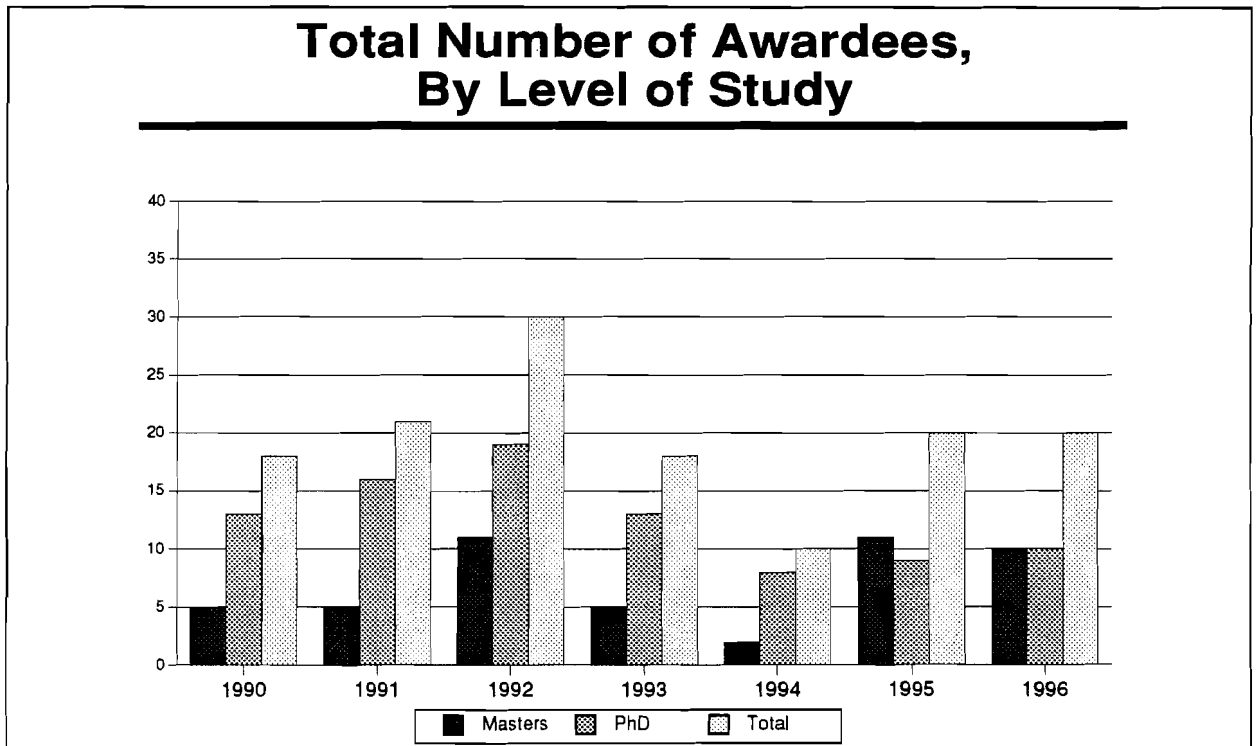
- |               |   |
|---------------|---|
| CIDA awardee: | "Rural Women Organizing for their Health: the Role of Peruvian Grassroots Women's Groups in Health Development;"                    |
| CIDA awardee: | "Compréhension d'un programme de santé communautaire à Lima: rôle et travail des promotrices de santé;" and                         |
| YCR awardee:  | "The role of Community Organizations in Support of Household's Production of Child Health and Care in the Bambamarca Region, Peru." |

Considering the small size of the sample for comparisons (CIDA - 25 awardees, IDRC - 11 awardees), one could expect a greater incidence of congruence if the sample were enlarged to include *applications* received over a period of years by both programs. A cursory look at some of the proposal topics which won a CIDA award in 1995 further suggests how compatible they are with topics eligible under the YCR award, at least on the surface:

- ☐ "Remote Sensing and GIS Technologies: Local Indigenous Resource Management in Kalimantan, Indonesia;"
- ☐ "Qualitative Study: Maternal Health, Morbidity and Mortality, Kenya;"
- ☐ "Field Study of Groundwater Contamination from Agrichemicals - Banana Plantations, Costa Rica;" and
- ☐ "Electricity Production from Renewable Sources for Ambergris Caye, Belize."

***In short, there certainly is evidence that the YCR and the CIDA awards overlap in their funding of Master's level field research.*** Where in more prosperous times, such duplication might be tolerated or even welcomed as a twin program, persistent calls for restructuring

throughout the government make duplication prominent for target shooting. Referring back to our earlier comment on the generous awardee/applicant ratio of both programs, one might argue that collapsing Master's level funding under a single arrangement would actually enlarge the candidate pool and improve the competitiveness of the award. Which of the two programs then plays the lead role? A look at the number of YCR awards by level of study may help us to reflect further on this issue.



As indicated above, the tendency in the past has been for doctoral awards to outnumber Master's 3 to 1. The last few rounds of selection, however, gave out almost as many Master's as PhD awards, and in some cases more awards proportional to the number of applications received. In 1995, out of 35 Master's applicants, 11 received an award, whereas out of 40 doctoral applicants only 9 received an award. It becomes difficult to interpret what this means about the future intent of the program vis a vis its original objective of concentrating on doctoral level. ***Even so, it is significant that CIDA gives out 25 awards every year to Master's students, more than double YCRA's number of awards to Master's. If the two programs are seeking to define their niche, the CIDA awards already seem to have staked out a significant claim.***

### Mini Summary

The fact that there is duplication between the YCRA's Master's award and the CIDA Award for Canadians is difficult to overlook. The "gap" rationale for opening up the award is no longer convincingly relevant.

### Summary

- ❑ On balance, what is important to highlight is that the Master's candidate pool is definitely a source of exciting, competent proposals which deserve support if Canada is to nurture a talented new generation of international development thinkers, practitioners and researchers.
- ❑ The YCRA, by its mandate and institutional characteristics, is well positioned to compete for the administration of the CIDA awards program and, in that way, maintain a hand in fostering Master's students alongside doctoral.
- ❑ If the above option is not feasible from an administrative perspective, then the YCRA program should seriously consider leaving Master's level funding to the CIDA awards program and refocussing on the doctoral level. A strong word of caution, however: before exiting from the Master's level, the YCRA should verify CIDA's continued commitment to the award.
- ❑ Failing that, the YCRA should at least work out a collaborative arrangement with the CIDA Award Program to attenuate duplication of effort in promotion and selection.

## 2.8 Thematic Criteria

While each of the issues dealt with thus far have their place in shaping the YCRA program, the issue of thematic criteria cuts to the soul of IDRC. ***The thematic criteria incarnate the identity of the funding source, and its commitment to certain priorities within the larger international development matrix.*** How closely should the YCRA's eligible fields of study mirror IDRC's Corporate Program Framework? How can candidates be drawn into the cutting edge of development thinking? Does the term sustainable and equitable development adequately describe the arena for action? Is there a need for greater focus to fertilize innovative thought? How can criteria be better articulated to facilitate a fair and comparative evaluation of proposals without inhibiting fresh insights and approaches?

As a general proposition, one would expect that the choice of thematic criteria would reflect the current emphases and priorities placed on development issues by the global community. Sustainable and equitable development is the current umbrella under which the global community expresses its hopes for the future well-being of all its members. As defined by the Brundtland Commission, "Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs."<sup>23</sup> This definition provides a certain philosophical beacon but, as a guide for thematic criteria, it leaves the door open to vague notions and principles that would sap the YCRA program of strategic focus and make the task of candidate selection extremely difficult.

What do we truly mean by slogans of the hour, such as sustainable development, poverty reduction, environment? What are the *really* important issues in development today, and what will they be 10 to 20 years from now?

Entering the 21st century "sustainable and equitable development" is in crisis.<sup>24</sup> Although there have been successes under the old models of foreign assistance, the process of development and the causes of poverty are still imperfectly understood. Despite progress in economic growth, technological breakthroughs, reductions in global military spending, spreading democratization and rule of law, a long agenda of human deprivation still awaits resolution on an environmentally fragile planet.<sup>25</sup>

The UNDP identifies three main reasons why ODA has achieved less than hoped for.<sup>26</sup> The first is that ODA levels have been relatively small and for some years have been in dramatic decline. Aid as a percentage of gross national product is now at its lowest point in decades. Official aid programs are under growing pressure in many countries due to "aid fatigue," cynicism, dwindling public support, domestic economic malaise, diversion of funds to the needs of Eastern Europe.

Secondly, in spite of pious statements to the contrary, there has been an absence of poverty focus, as evidenced by the fact that three quarters of the world's poor live in 10 developing countries which receive only one quarter of total ODA. Allocations have been distorted by

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23. *Corporate Program Framework I*, International Development Research Centre, 1993-1996, p. 7.

24. Boutros-Ghali, Boutros, *An Agenda for Development 1995*, United Nations, New York, 1995, p. 18.

25. United Nations Development Program (UNDP), *Human Development Report 1995*, Oxford University Press Inc., New York, 1995, p. 13.

26. Anema, Frans, *CIDA Awards for Canadians Program: Eligibility Criteria*, Canadian International Development Agency, Ottawa, Ontario, 1994, p. 8.

political and economic considerations. UNDP specifically identifies what it calls the *ethno-centric failure*, by which it means that ODA was used to fill a gap in capital and advanced technology available in the rich North and absent in the poor South. On hindsight, it is increasingly felt that this focus took away from true measures of human development.

The third reason is ODA's strategic shortcomings resulting from the ideological divide between East and West and North and South. This the UNDP calls the *Cold War failure*, wherein aid programs served largely as instruments for forging political alliances rather than alleviation of poverty as such. Indeed loss of strategically motivated interest in the developing world in the post Cold War era is cited as a prime reason for shrinking aid budgets.

The world must move to a new concept of what aid should be about. That includes active participation by people within the recipient country in the design and implementation of projects, rather than relying exclusively on bureaucracy to bureaucracy aid transfers. It includes changing the relationship between donor and recipient governments from charity and dependency to interdependence and shared obligation. "The idea that aid is a form of intergovernmental charity will have to give way to the concept of aid as a form of payment for services rendered where, for instance, developing countries act as custodians of rare species and biological diversity and as managers of tropical forests."<sup>27</sup>

At the cutting edge we find various recommendations by the UNDP (Mahbub ul Haq) intended to build a renewed rationale for ODA. The new rationale for the future is *Global Human Security*, a concept that is defined in terms of the inter-connectedness of people, where a country-specific condition may have ramifications for the rest of this small global community in which we live. Thus famines, ethnic conflict, social disintegration, terrorism, pollution, drug trafficking, environmental degradation are no longer isolated events but affect us all, rich and poor. In order to achieve *Global Human Security*, the UNDP proposes a number of strategies ranging from grass roots activities at the community level within a framework of a longer-term strategy for sustainable development, to improvements in other areas of international cooperation such as structural adjustment, direct foreign investment, international trade, etc.

The proposed agenda is an ambitious one, wide in scope, with ideas that seem sensible and appear to be gaining ground internationally, at least in intent if not in practice. However, as a foundation for the design of the YCRA program, the agenda seems quite impractical because of its all-encompassing nature. A strict adherence to this agenda as a guideline for eligibility and selection of candidates would fail to provide a necessary focus to the YCRA program. It

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27. Commission on Global Governance, *Our Global Neighborhood*, Oxford University Press Inc., New York, 1995, p. 192.

would fail to give the program a clear identity. It would allow a wide variety of research projects that may, because of their diversity, lack the critical mass required to draw thematic/sectoral conclusions that could be of significant benefit to the IDRC as an institution. It would also fail to help define and support a Canadian comparative advantage in an area that could produce Canadians with a world reputation. Needless to say, a wide open field would also make the candidate selection process a very difficult task in the absence of clear guidelines and weights for rating proposals.

It should also be mentioned that there is a subtle tension between several aspects of the concept of *Global Human Security* and the real meaning behind the words "sustainable development." We should be aware of the need for clarity. Let us assume that we all guess correctly that we are talking about *environmental* sustainability, as opposed to financial, organization, cultural, economic sustainability. But how is development sustainable? Is the act of development truly "sustainable?," i.e., is it and will it continue to be neutral on the environment? There are some interesting opinions on this topic, opinions that are worth contemplating with reference to the YCRA program. One of the world's leading naturalists, the Canadian John A. Livingston, in his recent book *"Rogue Primate,"* expresses serious reservations about the concept of sustainable development. He questions the meaning and value of the various concepts used in the past to advocate and justify development, such as "resource management," "resource development," "eco-development" and "appropriate technology." He then remarks:

At the present moment we have "sustainable development," a full-blown oxymoron. What these slogans seem to say is "How to plunder Nature and get away with it."<sup>28</sup>

Other naturalists would join Livingston in arguing that the term "sustainable development" was created to rationalize the fact that commercial development means environmental disruption.

Only a very summary examination of the environmental destruction that has taken place in the last few decades, would suffice to show the validity of these strong opinions. ***This dichotomy too is very much at the cutting edge of development issues.***

What then might these deliberations mean for the YCRA program's thematic criteria?

The issue of eligibility has been addressed with some degree of prescription in the YCRA program's promotional materials: "applications will be accepted for research on topics related

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28. Livingston, John A., *Rogue Primate, An Exploration of Human Domestication*, Key Porter Books Ltd., Toronto, 1994, p. 60.

to sustainable and equitable development which correspond to IDRC's research priorities." The research priorities are then enumerated in thematic categories drawn directly from IDRC's Corporate Program Framework. The six multidisciplinary themes have "the environment" as a common denominator. This focus seems clear and unambiguous. ***The multidisciplinary responds well to the complex interrelationships characterizing global issues and particularly to what CPF I calls "the inevitable — and now urgent — interdependence of development and the environment."*** The multidisciplinary in itself reflects a growing trend in research institutes and academia to work with matrix models which encompass a broader range of interrelated issues reaching across disciplines. From this point of view alone the thematic approach encourages the upcoming generation of researchers to think in more complex paradigms and to develop the mental agility that the next century will require.

While the multidisciplinary themes emphasize the priority given to environment and development by UNCED and thus provide both focus and scope, the YCRA promotional material also identifies a number of other eligible sectors which tend to open up the field considerably. These too form part of IDRC's Corporate Program Framework and IDRC's new responsibility to work with developing countries on the implementation of Agenda 21. ***However, a number of the areas (e.g., social sciences, human resource development, management of innovation systems) are so vast in scope that some awardees were prompted to comment that "IDRC is open to anything," while IDRC staff commented that proposals are "all over the map."*** Any perceived advantage gained by the thematic focus on environment disappears.

In regard to these broad topics, the YCRA program will have to ask itself some very hard questions. Should the program encompass a wide selection of fields in order ensure a large candidate pool from which to select, and perhaps not miss out on the potential Nobel Prize winner? Or, should it limit itself to key developmental concerns to encourage a distinct comparative advantage for Canada and the IDRC? Finding the right balance is a concern for all award programs.

We do not wish to pre-judge the answers to these questions, some of which are currently being debated within the Centre as part of the discussion on CPF II. Nevertheless, a few comments may help further reflections on this issue.

In the first place, as a general principle, there are distinct advantages to a more focused approach in defining fields of eligibility. Using IDRC themes means that there is more likely to be in-house competency for reviewing proposals. As mentioned earlier, comparison of proposals for quality is greatly facilitated. Interestingly, a number of comparable award programs are earmarking at least a certain percentage of awards for identified themes.. ***Experience has shown that researchers tend to conform to the funding environment. In***



*other words, anxieties that the size of the candidate pool will shrink if eligible fields are prescribed may well be offset by the possibility that candidate interest would actually be drawn towards themes that IDRC feels have strategic importance or that are understudied.*

The CMHC program for Master's and PhD level students, for example, was originally open to anything provided that candidates could demonstrate a link to housing. CMHC later shifted to an annual competition based on ten priority areas for research, that were identified as relevant and urgent by the National Housing Research Committee. The experiment was highly successful. Applications flowed in, showing a great deal of innovation in their approaches to relating to the priority themes. CMHC felt that this gave a necessary direction to the work being supported by the awards program.

*Most IDRC officers consulted seemed to feel that eligible sectors should be limited, and we tend to concur with that view.* The Centre cannot be all things to all people, neither can the YCRA program. It is important to prioritize, to define and encourage Canada's comparative advantage, to look at the world 20 years from today and decide on a course of action now. The need for focus seems to be well recognized judging from IDRC's 1993-96 corporate framework and the YCRA program's fields of eligibility which are firmly based on this framework. As was mentioned earlier, however, the promising thematic focus of environment was subsequently largely undermined by opening the program up to fields that have an almost limitless interpretation.

#### Summary

- ☐ We agree with the YCRA management that "sustainable development," (i.e., environmentally sustainable development) provides a good thematic focus for the program. It is relevant, and becomes increasingly so as days go by. At the same time, this theme provides ample latitude for innovation.
- ☐ If there is a desire, or perhaps an internal imperative, to open eligible fields up to areas of vaster scope, such as human resources development or social sciences, we would suggest that the YCRA program at least require a closer fit with what IDRC is actually doing in those areas. Lack of relevance to IDRC priorities (along with weak methodology) was cited by IDRC reviewers as one of the most frequent reasons for rejection of proposals.
- ☐ To help orient prospective applicants, the YCRA might include in its promotional material a list of current IDRC projects or initiatives.
- ☐ The YCRA could also have its own home page on the World Wide Web, with a pointer to the IDRC home page, where candidates could familiarize themselves with IDRC's priorities and areas of interest.

## 2.9 Affiliation as a Criterion

Of all the issues surrounding eligibility criteria, the one regarding affiliation has sparked the least debate in the history of the program. Nevertheless, a few points might be made for the record.

The requirement, that candidates give proof of affiliation with an organization in the country where the research is to take place, is consistent with one of the fundamental principles of IDRC: to work with its partners in the South on the issues of most pressing concern to them. The requirement enhances the potential for solid research outcomes, while sending a clear message to the academic community that development research is all about good affiliation.

Over time, a lack of guidelines defining what is expected of institutional affiliations gave rise to inconsistencies which complicated the evaluation process. This was the impetus to the study on impacts and affiliation conducted in 1995. The study brought useful insights to the YCRA program and reaffirmed the value of affiliation from the perspective of the awardees. It also noted that applications sometimes proceeded to the review stage without the affiliation criterion having been met, and that in such cases reviewers would be asked to suggest suitable institutions. From there, the report went on to conclude that "perhaps it would be better to drop the affiliation requirement at the time of application, in favour of a collaborative process between the successful applicant and the reviewer to establish the most appropriate affiliate."<sup>29</sup>

We would like to posit an alternate view to that recommendation. ***If an important part of development research is identifying stakeholders, then it is reasonable that the onus should be on the student to scout out what local institutions are active in and relevant to the subject of the proposed research.*** Mapping the institutional configuration in a sector, identifying the roles of individual organizations in the public and private realm, recognizing the patterns of authority, influence and linkages can be an important preliminary to actual research. The student's ability to secure an affiliation that is ***scientific and substantive*** may well be an indicator of the type of person best suited to development research. Qualities such as initiative, patience, persistence and resourcefulness are as requisite to the preparation of a good proposal, as they are to the carrying out of good field research. This does not suggest that, once in the field, other "unofficial" affiliates might not come to play a more important role than the one originally proposed. Nor does it suggest that IDRC can't be consulted for advice before applying for, or after receiving, the award. What it does imply is that ***a well planned proposal should take whatever measures are necessary to ensure that this basic requirement is met at the time of application.***

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29. DaSilva, Christian M. *Impact and Institutional Affiliation Study of the Young Canadian Researchers Award Program*, International Development Research Centre, Ottawa, Ontario, 1995, p. 16.

Oddly, on this point the report is a bit contradictory since it also states that the vast majority (90%) of respondents had arranged affiliations prior to leaving Canada. Moreover, the awardees consulted for this review affirmed that this requirement does not pose a difficulty; in some cases the university itself stipulates institutional linkage for certain thesis topics and provides guidance to that end. Universities are actively seeking international connections for collaboration, networking, contracts, exchanges at Faculty and student levels. In a sense they have a vested interest in helping potential awardees secure suitable affiliation, as it can serve to establish yet another contact for the university, or reinforce a linkage that has already been made.

#### **Summary**

IDRC certainly has a comparative advantage over other award programs in its wide network of contacts. To capitalize on this advantage, it makes sense that IDRC should advise awardees on alternative affiliates and contacts, as required after selection, or on the request of the candidate before applying. In other words the onus to provide proof of affiliation should rest squarely on the shoulders of the student, who should comply with this requirement before applying.

## CHAPTER 3

### Putting Issues Into Perspective

#### 3.1 Implications for Program Design

The issues discussed in previous sections provide the backdrop against which various elements of program design can be sketched out. All of the issues have implications for eligibility criteria, the setting of which will now have to be governed by some executive decisions on the part of YCRA program management. Foremost among these is what we called program definition, that is, the lucid prioritization of goals according to whether they are primary, secondary or complementary in importance.

Once eligibility criteria are firmly established, there should be a natural and kindred progression to the next stage which is selection. *Whereas eligibility criteria will determine whether an individual qualifies for the award, selection criteria will determine the degree to which the individual qualifies.* This implies that there is a pre-screening of applicants such that the selection process is not burdened by considerations of aggregate criteria such as age, location of field work, or level of study, nor by unmet standard requirements such as proof of affiliation, transcripts, references and so on. It also implies that selection criteria are cut from the same cloth as eligibility criteria and program definition. This is where the question of rigour versus flexibility gains poignancy.

To date, the YCRA program has derived considerable strength from a flexible approach to its own eligibility and selection criteria. Some officers within IDRC believe that the current system of flexibility is realistic given the range of applicants and the complexity of issues surrounding candidate suitability. They feel it allows for broader participation in shaping the YCRA program through debate and negotiation at the selection stage. The group ranking ensures that appropriate choices are made and that any subjective bias or favouritism is checked. *We would also like to acknowledge the general sentiment that flexibility represents a certain triumph over bureaucracy.*

On the other hand, flexibility can obscure or dilute program objectives, allowing the selection process to lapse into ad hoc systems which ultimately become very subjective and consume considerable time and energy. Flexibility can also affect perceptions of fairness and transparency. Some who have served on selection committees were adamant that the process requires a more systematic approach. They argued for universal, standard criteria of substantive rigour so that there is a common yardstick for comparing one award with another. If participation in the selection process is not guided by the YCRA's own sense of direction

and supported by a certain rigour of process, the tail can end up wagging the dog, or as the YCRA program manager so aptly put it, the intent of the program can be "hijacked."

To its credit, the YCRA program has tended to be responsive to applicant trends. It has also maintained an open attitude with respect to how individual reviewers choose to go about evaluating proposals. Notwithstanding the need for a tighter program design, we do not advocate a straight-jacket approach. To some extent it is important for the program to keep a pulse on trends and to allow reviewers the elbow room to make informed decisions. *We feel that the program is basically very sound, and that it follows much the same principles and procedures as other, much larger award programs. Moreover, we note that several recent improvements move the program in the general directions we will propose.* Nevertheless, it may be constructive to pinpoint a few weak spots that have worked their way into the system over time:

- ☐ There is a fairly high incidence of exceptions to the criteria supporting the original intent of the program. Some areas where exceptions have been made include:

Exception	Reason
<input type="checkbox"/> 50% of total awards now Master's	<input type="checkbox"/> Relative weakness of doctoral proposals?
<input type="checkbox"/> Return to country of origin	<input type="checkbox"/> Added experience, insight and language capability
<input type="checkbox"/> Over 40, over 50	<input type="checkbox"/> Added experience, exceptional proposal
<input type="checkbox"/> The Canadian window	<input type="checkbox"/> Mutuality of development problems
<input type="checkbox"/> Proof of affiliation not in place	<input type="checkbox"/> IDRC helping to select appropriate one or affiliation "in the works"
<input type="checkbox"/> Coursework not completed	<input type="checkbox"/> University policy of integrated study/fieldwork or on recommendation of supervisor

This has left numerous questions in the minds of those involved with the selection process. Where has the focus on doctoral level gone? What has happened to the promising "young" researcher? Where is the goal of practical exposure to development problems? Do the exceptions prove the rule, or are there no rules, or are the rules in need of updating?

- ☐ Promotion materials contain ambivalent language reflecting the program's own ambivalence on key issues. Application packages do not avail of the opportunity to give information on IDRC, or guidance that might enhance proposal quality.
- ☐ The YCRA has very little visibility both within IDRC and the academic community. As such, it misses out on a unique opportunity to be of strategic value to IDRC in contributing to its Canadian agenda.

- ❑ As indicated earlier in this report, selection committees get embroiled in time consuming debates over issues that should be resolved at the eligibility stage.
- ❑ There are ambiguities around the extent to which prior developing country experience is an asset or a liability, both for the reviewer who judges and for the applicant who attempts to put the best foot forward.
- ❑ In assessing a candidate's suitability, individual reviewers make assumptions about the YCRA's principles, preferences and focus, which may or may not be accurate or, for that matter, shared with other reviewers.
- ❑ Selection committee members and technical reviewers sometimes come to strikingly different conclusions on the merits of a proposal. The technical reviewer sees only a small number of proposals and does not have detailed information on the criteria that the selection committee will use.
- ❑ The selection committee has the advantage of seeing the whole candidate pool for comparative assessment but does not use the same evaluation grid as the reviewer. Although the evaluation form currently in use is structured to solicit qualitative assessment, there is sometimes still a lack of sufficient annotation, which would help back the reviewer's rating of the proposal.
- ❑ Although the YCRA does give general guidelines, selection committee colleagues do not share a common method of assessing proposals, preferring to develop their own evaluation instruments ad hoc.
- ❑ Since a different committee is convened for each round of selection, there is little corporate memory that would help promote a consistency of approach.

We would now like to make a few suggestions that might help strike a healthy balance between flexibility and such imperatives as clear policy, transparent criteria and effective process.

### **3.1.1 Promotion**

A great deal can be achieved up front by developing promotional materials that elaborate on YCRA's rationale. A number of comparable award programs provide considerably more context, allowing prospective applicants to get a better grasp of whether, why and how they are likely to be successful candidates. Some programs even provide guidelines for writing proposals. This can help to raise the candidate's awareness of the granting organization's

philosophy and perspectives, as well as what is understood by good research in the developing country context. It can be a vehicle for encouraging the academic community to open onto a more pragmatic viewpoint, emphasizing action-oriented, policy-oriented, applicable research.

### **3.1.2 Pre-Screening**

The selection process should be "blind" to information such as age, national origin, or gender, so that reviewers and selection committee members can focus on the strength of the proposal and the candidate's suitability. This is standard practice for other similar award programs. In fact, some of the U.S. programs explicitly request that individuals providing reference letters not divulge such information.

### **3.1.3 Distribution**

If there are concerns surrounding a balanced pool of recipients, these concerns should be addressed only once the applications have been assessed and ranked according to merit. Several comparable award programs do not balance at all, preferring to analyze distribution data after the fact; any undesirable imbalances are then addressed by a positive targeting of promotion to groups inadequately represented.

### **3.1.4 General Principles Regarding Criteria**

Selection criteria should flow from and reflect the goals, objectives and priorities of the YCRA program. They should be standard, meaning that all participants in the selection process (whether technical reviewers or selection committee members) use the same agreed upon criteria, preferably even the same forms, for direct comparison. Criteria should be universally applied within given candidate pools. Application forms filled out by the candidates and evaluation forms filled out by reviewers should be analogous and transparent in terms of drawing out information that will figure prominently in assessments.

### **3.1.5 Comparing Master's with PhD Proposals**

To protect rigour of process and ensure universal application of criteria, Master's and PhD candidate pools should really be considered separately. This should be done with the assistance of differentiating criteria which acknowledge the relative depth and strength of proposals that might be expected at the more advanced level of study.

### 3.1.6 Considering Renewals

By the same reasoning, proposals which are actually renewals should be considered separately from the main candidate pool, with criteria and/or requirements appropriate to this group. For example, there might be a requirement that the original proposal be accompanied by a well argued case for renewal as well as progress reports from the candidate, supervisor and affiliate. A specific criterion might be whether the renewal constitutes an extension not foreseen originally, as opposed to being the second half of what was conceived from the outset as a two year project.

### 3.1.7 Role of the Reviewers

Reviewers and selection committee members should have terms of reference defining clearly what the goals of their participation are, what their respective roles are and how they are expected to fulfil them. The independent reviewer's main input may be in assessing the technical and scientific merits of the proposals and providing an initial ranking. However, for these rankings to effectively structure the selection committees deliberations and facilitate the work of the committee, the same criteria should be used by both. Ideally, there should be a prior meeting of all those involved in selection and review to ensure that there is a shared ground of understanding of YCRA program goals, in all their nuanced implications. Reviewers should also be informed of the selection committee's final decisions.

### 3.1.8 Selection Committee Composition

The tasks associated with selection of YCRA awardees draw heavily on the good will of IDRC program and research officers. Since the composition of the committee changes yearly, there is little continuity of experience with the process, no sense of ownership of the program among members and varying degrees of atunement to the true intent and emphasis of the program. Given the pace of change at IDRC itself, it is even more difficult for reviewers to situate the YCRA within the new corporate framework.

*To build some continuity, uniformity and consistency in selection from one year to the next, we would recommend assigning terms to committee members in such a way that there is always a mix of old and new members.* This is a common practice among comparable award programs, with terms sometimes running for three years. Since the selection process is often a time-consuming and faceless task, committee members could also be given more recognition. For example, appointments might be made formally by the VP of Programs Branch, on the recommendation of the VP of Corporate Services. Moreover, the appointments could be announced in the IDRC staff newsletter "Echogramme," as are other



committee appointments. This would give the YCRA an opportunity to raise its profile within IDRC, while formally acknowledging the help of IDRC colleagues.

### 3.1.9 Inviting Outside Participation on the Selection Committee

While we acknowledge the powerhouse of expertise which exists within IDRC itself, there may be some distinct advantages both for the YCRA program and for IDRC in general, to including university faculty members, or other outside expertise, in the selection process. As we shall see in the following chapter on comparable award programs, this is a standard practice. Academics consulted for this review suggest that participation on selection committees outside the university is seen as a part of one's responsibilities as an academic citizen. The inclusion of university faculty members would provide IDRC an additional window on what is happening in the academic community, ensure greater visibility and a broader promotion of the program on university campuses. One might anticipate an improvement in the quality of candidates as universities gain a better grasp of the program and direct their best students to the YCRA. Such an arrangement would also enhance competitive and transparent process. Finally, it should not be overlooked that this type of networking with Canadian constituencies is strategically wise at a time when IDRC itself is concerned with raising its public profile.

### 3.1.10 Weighting of Selection Criteria

Successive waves of program adjustment have seen numerical rating scales and tentative weighting schemes come and go. Some comparable award programs use weighting, others do not. Weighting can: facilitate comparison between proposals, allow for emphasis on certain program goals, hold reviewers accountable for their decisions and prompt them to reflect on the reasons behind their decisions. The main shortcoming of explicit and tightly figured weighting schemes is that they do not allow for enough qualitative assessment of the candidates. *Ultimately, there must be room to make some judgement calls on the unique confluence of desirable qualities in a proposal.*

The YCRA program may wish to consider a hybrid system whereby one portion of the evaluation form uses weighting. Included in that section might be *the key criteria* such as relevance to sustainable and equitable development, relevance to IDRC priorities, applicability of research and methodological rigour. Bonus points could be assigned to *less critical but desirable variables* which, depending on what the program deems these to be, might include innovation of the proposed research or certain elements of the candidate's personal suitability. Other information such as affiliation, academic standing, and general experience can be used to round out the picture without any numerical weight. *Crucial to any weighting scheme is*

*the full annotation of numerical assessments so that qualitative judgments are also clearly conveyed.* Working out the details of such a scheme is beyond the scope of this review as it would have to be very carefully designed and tested, especially considering that many committee members have already gotten used to their own, less formal, methods of evaluating.

### **3.1.11 Enumeration of Indicators**

By indicators we mean evidence of specific strengths or weaknesses associated with each criterion. Evaluation forms could be enhanced by an enumeration of indicators, which act as a checklist of things to look for, without constraining reviewers to rate them per se. This can be useful for standardizing approaches, particularly in the case of criteria that are more prone to discretionary treatment.

Candidate suitability is a good case in point. Under that rubric one might look for evidence of an ability to relate to the concept of sustainable and equitable development beyond the parameters of the research proposal. One might also look for general level of preparedness as evidenced by, for example, an up-to-date, comprehensive bibliography of the current literature on the proposed topic, including Southern as well as Northern sources. One might look for how the candidate makes a case for having or not having prior developing country experience, along the lines suggested on page 20 of this report. One might also look for evidence of "softer" traits predictive of good researchers (as reported by the Medical Research Council and discussed on page 19), or those predictive of cross-cultural effectiveness discussed on the same page.

For this approach to be valid, however, application forms must be structured to draw out this type of information.

## **3.2 Thinking Strategically**

The issues analyzed in this report may help the YCRA to sharpen up its rationale and to realign different elements of program design accordingly. We would like to devote a few final words to the possibility of broadening the vision of what the program can do, within the resources available.

### 3.2.1 What Is YCRA's Strategic Value to IDRC?

The Canadian profile of IDRC is one of the earliest debates in the Centre's history. While roughly 18% of research grants go to partnership arrangements which involve Canadians, the appropriate balance of time, dollars and activities for the Canadian component has been and continues to be a difficult choice. In the early 80's IDRC's three Canadian regional offices were closed, and with it, the benefit of a low-key but contemporary visibility. IDRC is struggling to convince Canadian politicians that there continues to be value in doing development research. There is now a clearer political imperative for IDRC to have some activities and presence both within the Canadian research community and in the Canadian public eye. *It is our perception that while most program officers would shy away from a blatant approach to raising IDRC's profile, they would certainly see the YCRA as an acceptable, legitimate vehicle to advance the "Canadian" agenda.*

It is important for IDRC to be in touch with Canadian universities and faculty advisors both for support on a political front, as well as for general research networking. *In its own way, the YCRA can reinforce or even expand these relationships through promotion of the awards, through the awardees themselves and possibly through the inclusion of academics as members of the selection committees.*

Other domestic pressures to which the IDRC is not immune include the government's emphasis on opportunities for youth. Here again, the principles of the YCRA program happen to enjoy a natural and singular concordance with the political flavour of the day. *This is not to minimize the importance of such an emphasis, but rather to signal a new timeliness from which the program can benefit.*

Given the climate of budgetary restraint within the federal government, IDRC must compete with other demands on the public purse. Its financial condition being fragile, there is a certain polarization within the agency between those who would mobilize energies around new revenue generating models of operation and those who prefer to resist this deviation from the Centre's primary mission. That mission, as defined in IDRC's 1996 publicity brochure is still true to its founding vision: empowerment through knowledge by funding research that meets the priorities of the developing world and improves the circumstances of the world's poor. *While the YCRA may not represent an imposing percentage of IDRC's overall budget towards that goal, this would certainly seem to be an opportune time to explore the program's potential for concentrating its investments and getting more leverage out of dollars spent.*

IDRC's recognition as a well-administered research interface has attracted dollars from both bilateral and multilateral donors for special initiatives. There are currently 10 in-house multi-funded secretariats which draw on IDRC's technical and moral support. *A parallel concept*

*for the YCRA might be seek partners in the private sector for the funding of its program. It might also seek to collaborate with the CIDA Award program for Canadians at Master's level, rather than duplicate it with its own awards. Alternatively, the YCRA may wish to submit a proposal to administer that award on CIDA's behalf.*

### **3.2.2 In What Ways Can the YCRA Think More Strategically About its Program?**

We need to ask if capacity building can be better served by selecting fewer awardees but providing more enhancements to stimulate continuing interest in development research, or by releasing larger numbers of awardees into the research stream and hoping that a reasonable percentage will maintain a commitment to development.

At the moment the YCRA fund of approximately \$400,000 per year is divided into roughly 20 awards. At the same time there have been periodic concerns over the size of the candidate pool and the quality of proposals. In light of this, the YCRA may wish to consider reducing the number of awards and putting the remaining funds toward various enhancements that would carry the initial investment in selected individuals one step further. While we realize that the program may not wish to reallocate scarce resources in this way, we feel it is important to open up some horizons for consideration:

- ☐ Special internships for YCR awardees.
- ☐ Coordinating an annual or periodic conference for awardees to present their research findings to each other and to IDRC. This would provide a forum that validates their own experience while broadening their perspectives with the experience of others. Such a conference could be a major catalyst for the creation of a critical mass of development thinkers. It would also give awardees the opportunity to learn more about IDRC's activities and to meet with program officers in fields related to their own. (Some awardees even suggested that a portion of their award could be earmarked for this purpose.)
- ☐ Developing and maintaining a roster of former awardees for possible contract employment with IDRC and as a support to networking efforts between former awardees. The program could experiment with an annual or bi-annual newsletter, with contributions from the awardees themselves, and possibly disseminate this through the YCRA home page.

Both the 1992 Survey of Former YCR Award Recipients and the 1995 Impact and Institutional Affiliation Study recommended that the program invest in follow-up with awardees and we would definitely concur with that view. Simply providing

funds for research, without any follow-up or requirements, promotes the idea among recipients that YCRA is a funding body and nothing more.

- ❑ Although the YCRA tries to maintain contact with award recipients, some awardees expressed disappointment at having limited contact with IDRC once their award was granted. They had hoped to receive feedback from IDRC on their proposal, as well as on the progress reports and end of fieldwork summary. While it may be unrealistic to expect that IDRC program officers have enough time to devote to such an exercise for 20 awardees, perhaps a smaller number of awardees would make this interactive approach feasible.
- ❑ Making the YCRA a more prestigious, sought-after award. With fewer awards, the competitive process is invigorated, especially if it is accompanied by a dynamic publicity in the front end and tail end of the process. Those consulted for this review felt that the award does not get much exposure on campus; information is usually obtained informally through word of mouth.

If the YCRA were to develop a home page on the Web, it could hot-link to the home page of various universities wherever there is an entry such as "awards" or "international." Several award programs mentioned gaining broad exposure by advertising on the web and considered this to be a vital avenue for the future. A well worded advertisement in the program brochure of the annual conference of the Learned Society is another option to explore.

The use of a respected individual in the international development community to serve as the chair of the selection committee would further enhance the image of the award.

Winners of the award could be announced in the national press, again raising the profile of IDRC and giving another boost to the visibility of the award for the next round.

- ❑ In this age of partnerships, some energy might be devoted to getting the private sector or foundations to sponsor either a few awards or some of the supporting activities like awardee conferences. Many of the fellowship programs administered by the Social Science Research Council in the United States are funded by large foundations like Ford, Rockefeller and MacArthur.
- ❑ Considering other award program models which extend the continuum of graduate study support to include pre-dissertation assistance and post-doctoral fellowships. The pre-dissertation concept is particularly interesting as a way of attracting

promising individuals from single disciplines, who may be open to testing their field of research in a new context.

In short, the above points represent a schematic overview of some of the kinds of initiatives that the YCRA could experiment with to get better leverage out of its funds and to achieve more focused investment, for itself as well as for IDRC in general. Without arguing these possibilities more fully, we invite the program to cull the next Chapter for insights and approaches that might contribute to the dynamism of its endeavour.



## **CHAPTER 4**

### **Comparable Award Programs**

To identify some new approaches and particular lessons which could be applied to the YCRA, we consulted professional staff from a number of similar graduate fellowship programs. Although not all of these programs are described in this section, those which most closely parallel the YCRA in terms of stated goals and objectives or which offer some unique strategies or particular insights have been highlighted. Common to most of these programs is the goal of "promoting national research capacity and expertise" in a given field, while two of the programs share a common development focus with the YCRA. In some instances, these fellowships also provide additional funding options for YCRA applicants.

Included among the programs consulted are the graduate fellowships administered by the three federal granting councils, the CIDA Awards Program administered by the Canadian Bureau for International Education and the Shastri Indo-Canadian Institute Women and Development fellowships. To offer some non-Canadian perspectives on the development of national research capacity and expertise, two fellowship programs administered by the Social Science Research Council in the United States are also included.

Before turning to some of the more prominent features of each program, it is worth noting those design elements and strategies common to most graduate fellowship programs seeking to promote advanced capacity building.

#### **4.1 Common Design Elements**

Perhaps the most common design feature of the programs mentioned is the use of a fairly standard set of eligibility and selection criteria in identifying suitable candidates. Eligibility criteria for the programs consulted generally include the following:

- ☐ civic status (usually citizenship and permanent residence);
- ☐ level of study (Masters or PhD);
- ☐ field of study (according to appropriate disciplines or identified themes); and
- ☐ university approval of the proposed thesis or dissertation topic.

For those programs with an overseas component, proof of affiliation with a local institution and evidence of language proficiency (where applicable) are also standard requirements.



For the most part, the award programs consulted also rely on similar criteria for selection, including:

- ☐ academic merit of the candidate;
- ☐ letters of reference;
- ☐ merit of the research proposal including the originality and potential contribution of the proposed research to the field of study;
- ☐ relevant academic background or experience in the proposed field of study; and
- ☐ departmental recommendation by the university.

*This approach to candidate selection, which relies heavily on the student's academic merit and the merit of the proposal, is, however, coming under increasing scrutiny as granting agencies become more accountable for the results of their funding and the impact of training. Most of the programs consulted are tracking award recipients more systematically than they did in the past in an effort to identify training results and, at the same time, determine more reliable predictors of future research and career success. As we shall see in the case of several award programs, there is a rethinking of selection criteria currently in use and a new emphasis being placed on the personal attributes of the candidates.*

Most programs also adhere to certain standard selection *practices* which include the application of *strict eligibility criteria*, a competitive selection process (with one or more rounds of screening) and a final selection committee meeting. Eligibility is normally conducted by program staff who ensure that files are complete and that all eligibility criteria are met. Once eligibility has been established, applications enter the competitive stage of the process where they are reviewed by a minimum of two readers (often selection committee members) who assess files and may provide an initial ranking of candidates. Selection committee members then review all the files and provide their ranking. *Prior to the final selection, program staff collate results* and establish a list of clearly successful and unsuccessful candidates. In the committee meeting, members discuss and resolve any large discrepancies in ranking as well as the marginal band of candidates.

Most of the programs consulted include anywhere from six to nine members on the selection committee, which is usually divided into sub-committees. *It is interesting to note that all of the programs, including those with considerable in-house expertise, make use of outside experts in the adjudication of files. The larger funding agencies generally solicit nominations from the academic community and, in some cases, from professional associations, while the smaller agencies approach possible committee members directly.*

While some programs rely on a formal evaluation grid for the assessment of candidates, others rely more heavily on the rigour of the selection process itself, continually skimming off the bottom portion of candidates at each successive level of selection.

## 4.2 Current Strategies for National Capacity Building

Like the YCRA, the comparable awards reviewed for this study have developed a number of new training approaches over the life of their programs. Some of these strategies have developed in response to declining financial resources and the need for streamlining and efficiency, while others have developed in response to a new world context which has undermined the capacity of past approaches to research to deal with the range and complexity of current issues.

Some of the newer strategies for capacity development include a multidisciplinary and thematic approach to training as well as an increased emphasis on the enhancement of training through network building and the support of existing university linkages. A multidisciplinary/thematic approach to training has allowed various fields of study (e.g., international development, environmental studies, international peace) to benefit from diverse perspectives and disciplines required to address increasingly complex issues. *In an environment of declining financial resources, fellowship programs are also seeking to gain greater leverage from their funding. Consequently, we see the evolution of many fellowship programs from a simple provision of funds for scholarly research or fieldwork to a more focused investment in a limited but critical mass of excellent researchers, whose training is further enriched through the building of networks and the support of a community of researchers in a given field.*

Let us now turn to some of the more prominent features of each program.

## 4.3 Federal Granting Councils

The three main federal granting councils in Canada, the Social Sciences and Humanities Research Council (SSHRC), the Natural Sciences and Engineering Research Council (NSERC) and the Medical Research Council (MRC), provide graduate fellowships to strengthen and develop Canada's capacity for research and expertise in their respective fields. *To ensure efficiency and avoid unnecessary duplication of effort, each of the councils has a defined area of jurisdiction. There are cases, however, where a proposed research topic overlaps these individual jurisdictions. To deal with issues of overlap, the three councils work in close collaboration to make sure that each proposal is assigned to the most appropriate of the three funding agencies, given the particular focus of the proposal.*

**i. The Social Sciences and Humanities Research Council (SSHRC)**

In 1995, the Social Sciences and Humanities Research Council awarded some 550 doctoral fellowships to students in the various disciplines of the social and human sciences. (A small program is also available at the Master's level for candidates in Social Science Policy.)

***Although each year roughly 9% of these graduate awards go to Canadians studying outside the country, it is worth noting that, to date, none of these awards have been used for study or research in a developing country.***

Perhaps the most striking feature of the SSHRC program, as well as the NSERC program, which we will look at shortly, is a new streamlined approach to the selection of graduate fellows, introduced in 1993. ***Due to federal cutbacks, the need for greater efficiency in selection and also the desire for increased involvement with the Canadian academic community, these two granting councils implemented a decentralized university-level pre-screening process.*** Now, rather than applying directly to the councils, graduate fellowship candidates submit their applications to their university department where an appraisal is completed and then forwarded to the Faculty of Graduate Studies. The Faculty of Graduate Studies arranges for a committee to pre-screen all applications and identify the top candidates whose files are then forwarded to the granting councils for adjudication in a national competition. ***According to both SSHRC and NSERC, this new approach to selection has resulted in not only greater administrative efficiency within the two councils, but has also considerably increased the quality of applications received as universities carefully direct only the most appropriate candidates to the national competition.***

**ii. The Natural Sciences and Engineering Research Council (NSERC)**

NSERC offers both master's and doctoral fellowships in the natural sciences and engineering, and in 1995 awarded some 925 Master's scholarships and another 525 doctoral fellowships.

***Although 10% of the doctoral fellowships are reserved each year for individuals studying outside Canada, as in the case of the SSHRC, these fellowships have not been used for study in a developing country.***

Interesting to note on the NSERC program is a recent initiative to reexamine the criteria currently used in the selection of fellowship recipients. To date, NSERC has focused primarily on academic excellence as the key criterion in selecting graduate fellows, with some additional weight being given at the doctoral level to the merit of the research proposal. In part due to new reporting requirements which emphasize training outcomes, as opposed to the numbers of individuals trained, NSERC is revisiting its selection criteria to identify better indicators of a candidate's future employability and research success. ***According to NSERC's Director of Fellowships, selection criteria will soon be expanded to include further***

*indicators of a candidate's personal suitability such as their interpersonal, leadership and communication skills. Some consideration is also being given to weighting these various criteria.* Although a number of organizations, including business, are making increasing use of such indicators, this is very experimental terrain with as yet untested results.

### **iii. The Medical Research Council (MRC)**

The Medical Research Council has numerous programs to develop Canada's capacity in basic, applied and clinical research in the health sciences. Among the awards offered by the MRC are Master's and doctoral "studentships" to assist in the training of new generations of investigators in the health sciences field.

The most prominent feature of the MRC studentship program is its rather unique approach to the selection of awardees. Applications for these awards are made by the research supervisor rather than by the student. Established Canadian researchers who are interested in training a student in their laboratory submit an application to the MRC for a studentship award voucher. The MRC evaluates the training record of each applicant as well as the suitability of both the laboratory facilities and the proposed training project. Award vouchers are then granted to the best qualified supervisor applicants who, in turn, develop a program to identify and recruit the most qualified student to receive the award. The MRC generally publishes a list of voucher awardees on the World Wide Web and interested students contact potential supervisors directly.

Of particular significance to the YCRA, is the rationale behind this unique approach to selection. This highly decentralized selection process was adopted following the results of a 1989 MRC evaluation which examined the success rates and achievements of former award recipients. This study looked at a number of variables which led to future success and concluded that certain personality traits (e.g., focused energy and investigative personality), combined with an excellent training environment, were far better predictors of future research success than were the more traditional selection criteria which rely heavily on academic merit. Obviously this research has also played a role in NSERC's recent review of selection criteria.

#### **4.4 Other Canadian Award Programs**

##### ***i. The CIDA Awards Program***

Earlier in this report, under the rubric *Master's versus PhD*, a number of similarities were drawn between the YCRA and the CIDA Awards at the Master's level, noting in particular the considerable overlap between the two programs. Some of the goals of the CIDA Awards were also discussed, including its emphasis on the promotion of development practitioners and strong field research. Because of these earlier reflections, we will now simply mention a few of the program's more distinguishing design elements.

Given its focus on practitioners and participatory-style projects, the CIDA Awards has built a couple of unique criteria into its selection process. First, in an effort to better achieve training outcomes, the program seeks applicants with a definite commitment to international development as demonstrated by both their educational, work, or volunteer experiences and their future career plans in this field. Furthermore, to promote context-sensitive and people-oriented development, selection criteria emphasize personal qualities the candidate brings to the project such as cross-cultural communication skills, flexibility and innovation. Unfortunately, the program has not yet established clear indicators to assess these qualities, but seems to rely primarily on supervisor reference letters and personal statements from the candidates themselves.

As a final point, we would like to note some modifications which have been made to the CIDA Awards in the last year. Rather than funding the full Master's program, as it did in the past, this award now provides solely for thesis field research. Twenty-five Master's level awards are granted annually for up to \$15,000 and twelve months field work.

##### ***ii. The Shastri Indo-Canadian Institute Women and Development Fellowships***

Although a very small program at the doctoral level, the Shastri fellowships program on Women and Development is mentioned here primarily because of its development focus and the additional funding option it could provide to YCRA applicants.

The Shastri Indo-Canadian Institute supports both India Studies in Canada and Canadian Studies in India through the funding of research, conferences and seminars as well as through the promotion of institutional linkages between the two countries. The Institute is funded by the Canadian International Development Agency, the Department of Foreign Affairs and International Trade as well as by member universities and private donations.

The fellowships program on Women and Development was established in 1991 and originally provided funding solely to Canadian university faculty undertaking research in India. Two years ago, the program opened up to include a small number of doctoral candidates. To date, however, only one doctoral fellowship has been awarded although it is anticipated that more doctoral candidates will be funded as the program matures and gains visibility.

Like the YCRA, this program emphasizes the building of linkages, the importance of applicable research outcomes and, perhaps even more so than the YCRA, the dissemination of research results. Candidates are required to affiliate with an Indian institute and, at the end of their project, submit copies of all papers and dissertations resulting from the program. This program funds only the field portion of doctoral research and provides up to eight months of financial support.

#### **4.5 Non-Canadian Award Programs**

The Social Science Research Council (SSRC) in the United States is a large granting body responsible for numerous award programs funded primarily by major U.S. foundations such as the Ford, Rockefeller and MacArthur Foundations. Among the programs administered by the SSRC are a number of doctoral dissertation fellowships for overseas research, including the MacArthur Foundation Fellowships on Peace and Security and the Africa Dissertation Fellowships program.

##### ***i. The MacArthur Foundation Fellowships on Peace and Security in a Changing World***

In reviewing the two SSRC fellowships, we will focus on the MacArthur program which, we are told, is being used as a model for the current restructuring of the international division at SSRC.

The MacArthur Fellowships support two-year doctoral and post-doctoral training and research overseas (for both U.S. and non-U.S. citizens) on issues affecting international peace and security. Like the YCRA, the MacArthur program has adopted a multidisciplinary and thematic approach to training. This approach has allowed the program to deal with the expanding definition of peace and security issues by drawing new disciplines and fresh perspectives into the study of these issues. The MacArthur fellowships, again reminiscent of the YCRA, require individuals to work within broad themes which set the parameters for the program. These themes are launched every three years by the program's international committee.

The MacArthur awards are highly competitive and of the one-hundred seventy applications received in 1995-96, seven doctoral fellowships were granted for up to a maximum of U.S. \$17,500 per year each. *It is interesting to note that as part of its effort to ensure rigor, a level playing field and a large, competitive candidate pool, all of the SSRC programs grant awards only once per year.*

*Some of the unique and more strategic features of this fellowships program are its emphasis on developing both innovative research and innovative new researchers through a very focused investment in a limited number of individuals.*

To promote innovative research and ensure that research is clearly linked to current peace and security issues, the MacArthur program prepares applicants to make substantial revisions to their dissertation plans during the course of their fellowship. *Commensurate with its emphasis on innovation is the further requirement that award recipients undertake their research outside their country of residence. This requirement, we are informed, is to reinforce the intent of the program and avoid its being used simply to support an individual's current work.*

To further enhance the training of fellows, the MacArthur program organizes an *annual fellows' conference* which allows new awardees to present their research topics and recently returned fellows to present their findings. Also included at these conferences are regional scholars who serve as guest lecturers and participate in presentations and panel discussions on select themes. *The purpose of these conferences is first, to develop the research capacity of new fellows by encouraging them to participate in cross-disciplinary and cross-national discussions in their field and second, to promote networking and the building of an international community of peace and security researchers.*

To further stimulate the growth of a "MacArthur Community" of researchers, the program provides grants to past fellows who wish to arrange small workshops on a specific topic. Funding for these workshops is intended to encourage network-building, collaborative research and discussions on cutting edge issues in the field of international peace and security. The MacArthur program often calls on past award recipients to participate in collaborative research projects funded by the SSRC.

When one considers the 57% response rate to a recent tracer study (which included respondents from around the world), the MacArthur program has been quite successful in its objective of developing a community of researchers in this field.

## ii. *The Africa Dissertation Program*

Like the MacArthur Fellowships, the Africa Dissertation Program provides up to two years of funding for overseas doctoral dissertation research at up to U.S. \$17,500 per year. Although this program is directed at individuals conducting their research in an African country, relatively few award recipients have focused on international development issues; according to the SSRC program officer, most applicants for this award tend to be in basic rather than applied social science research.

The Africa Dissertation program operates along the same lines as the MacArthur program, with conferences and workshops being an integral part of training. *A distinguishing feature of this program, however, is the provision of a limited number of pre-dissertation awards for field work and language training. While recognizing that it is generally not at the doctoral level that one attracts individuals to research in a developing country, the pre-dissertation fellowships provide a window of opportunity for those individuals who might consider doing research in a developing country, but who lack either the field experience or some necessary language training.*

### Summary

While identifying some current thinking and strategies to promote national research capacity, this survey of the fellowships field in Canada, and a cursory view of some similar programs in the United States, also attests to the unique focus and purpose of the YCRA doctoral program in the field of international development. We hope that some of the ideas and strategies presented here can further contribute to the strength and innovation which the YCRA has developed to date.





## CONCLUSION

The Young Canadian Researchers Award has been an excellent mechanism to help engage young people in international development. Its philosophy and process have adapted to IDRC's evolution as a centre of excellence as well as to significant trends in the Canadian student body. It is by virtue of the program's agile responsiveness that it has been able to achieve this. At this particular crossroad, as the agency itself is working towards a sharpened focus, it is appropriate that the program re-evaluate its current model for fostering a new generation of international development thinkers.

The authors of this report have attempted to lay out a number of issues that have arisen out of the program's very flexibility. Some of these issues have come to hamper the program's efforts to maintain focus and rigour. Their analysis suggests where potential improvement might be made. Foremost amongst these is a closer definition of program objectives such that eligibility and selection criteria can be more effectively tailored to serve those objectives. At the same time we have tried to open up the horizons of what is possible with such an award by highlighting interesting new features of some comparable programs. Some of the suggestions put forth in this report will require program management's more immediate attention, for example, eligibility criteria such as age and level of study, as well as certain elements of the selection process. Other suggestions can stay simmering on the backburner for more incremental implementation as the program redefines itself.



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## **APPENDIX 2**

### **References**

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