Smart Practices in Managing Policy Research Fellowship Programmes:

A Report from the meeting of OSI fellowship programmes.

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May 2006

EXECUTIVE SUMMARY

This report details the consolidated experience of OSI-Budapest in the design and management of policy research fellowship programmes. It was developed in a meeting of programme managers, trainers, mentors and fellows which took place in Budapest on 31st, March 2006. The aim of the meeting was to share the institutional learning developed across the network in fellowship programmes in order to improve the effectiveness of all programmes and in particular, to aid those in the start-up phase of their projects. The catalyst for this meeting was a realisation by the authors that fellowship programme managers across the network were facing very similar challenges and that trying to develop a set of smart practices for such managers would make a significant contribution to increasing the effectives of all programmes. The meeting included representatives from policy fellowships run though the network programmes (IPF and LGI), the national foundations (BiH and Mongolia) and affiliated organisations (ICPS, IPA/Strategia, and CEE).

It was the intention of the meeting to produce practical outcomes and so, this report is centred on actionable recommendations for managers. The recommendations provided were developed as a set of smart practices, i.e. more than best practice in that we not only need to include what we should *do* in a given situation, but also what to avoid.

A central theme developed through the discussion was the **emerging client perspective of OSI fellowship programmes**, i.e. we are looking more to get direct policy impact from fellowship programmes. However, the main new strategy being adopted in this strategic direction change, a heavy focus on the selection of more senior fellows, was questioned. It was suggested that **a more balanced approach including both junior and senior fellows** would better help to **ensure the longer term goal of a change in decision-making culture**.

A number of **overarching recommendations** came through the discussion:

- Beware of transfer - no one size fits all solutions;
- Take a reflexive, learning by doing approach to the management of the programme;
- Clearly and actively communicate to all those involved in the fellowship programme;
- Get outgoing fellows and mentors to communicate directly with incoming fellows and mentors, and;
- Clearly set the minimum levels of engagement for fellows and mentors.

A set of specific smart practices were generated in 4 main areas (previously negotiated via email by all participants) in the management of fellowship programmes:

1. *Smart practices for:* Selecting the right fellow

When developing effective selection criteria:

a. Start by clearly defining the goals of your fellowship given the constraints of your programme, your potential target group and the target issues and context.
b. Look for the right balance in the elaboration of a set of selection criteria suitable for your programme and context
c. Get as much input on the definition of selection criteria as possible.
d. Evaluate the effectiveness of your criteria and start the cycle again.

In the selection process:

- A two-stage selection process based on negotiating the research proposal is best.
- Phone interviews help in making the first cut; actual face-to-face interviews are best.
- Get as much feedback on candidates as possible.
- Avoid professional grant seekers and those trying to seek funding to continue their own projects, e.g. completing their PhD.

An Acceptable level of failure in a fellowship programme is 10 to 20%

2. *Smart practices for:* Selecting suitable policy issues to research in the fellowship programme

Choosing between broad and narrow issue areas:

Option 1: Keep the announced policy areas relatively broad, make specific suggestions within the topic, but allow applicants to come up with concrete and narrow proposals within the area.

Option 2: It is better to define the policy topics in-depth in advance.

The particular challenge of policy process topics:

- In process groups, there is a need to specify the methodology and target audience from the beginning and more mentoring is needed throughout.
- It may be easier and more effective to get process insight from sectoral studies than specific process research.

Selecting the hot topics vs. long-term policy issues:

- Be realistic about the type of policy influence you can expect from your fellows and choose more longer-term policy issues
- But make sure you choose real policy problems to motivate the fellows to conduct real policy research and therefore, maximise learning and potential for policy influence.

3. *Smart practices for:* Deliverables/products of the fellowship

The types of products/deliverables for a fellowship programme:

- Policy fellowship programmes should seek to contribute to the development of a corpus of policy-relevant research.
- A research/policy paper based on the findings of the research is the minimum we should require of a fellow.

Ensuring quality and relevance of findings/outcomes:

- Clearly communicating the requirements of all elements of the fellowship and providing details of what you expect maximises the likelihood of producing better quality products.
- Try to develop clear statements of the minimum level of quality that you expect.
- Strategically designing training interventions during the fellowship cycle can significantly improve the level of quality.
- Withhold payment of fellowship stipends if submitted work fails to meet the minimum required quality standards.
- Have all final papers peer reviewed, as mentor maybe too tied to a positive outcome.

4. *Smart practices for:* Selecting and working with mentors

Criteria for mentor selection:

- Over time, it is useful to build up a pool of mentors for the programme.
- It is useful to use a combination of local and international mentors.
- It may be useful to consider the looser concept of resource people, as well as mentors in putting together a suitable support structure for fellows.
- One route to policy impact is the choice of already influential mentors.

Working with mentors:

- It is best to invite known mentors, rather than have an open call.
- Get the mentor involved in the process as early as possible.
- Programme managers must clearly communicate programme expectations to mentors.
- It may be useful to use a quality policy paper produced in the programme as a holistic way of expectation setting.
- Encourage mentors to attend training sessions provided to the fellows.
- Keep mentors focused on content and methodology and out of issues of contractual compliance.
- Managers should take the lead in trying to manage conflicting messages from advisors to fellows.

Finally, a set of **practical next steps** are proposed:

- Develop a corpus of programme documents for all to draw from;
- Negotiate agreement on a naming conventions within OSI for the different types of policy papers;
- Draw on the experience of similar fellowship programmes outside of OSI;
- Continue to share experience though this group as we really only touched the tip of the iceberg in our one-day meeting

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1.0 INTRODUCTION

This report details the insights gained and experience shared by 18 participants at a meeting of OSI fellowship programme managers, trainers, former fellows and mentors, as well as representatives from other interested OSI programmes and affiliate organisations (See Appendix A for a full list of participants). The meeting was hosted by LGI and IPF in Budapest on March 31st, 2006.

The introduction section gives insight into the rationale and focus of the meeting, the process of negotiating the agenda via email and the working methods used in the meeting. Finally, a roadmap of the report is presented

1.1 Rationale and aims for the meeting

The idea for this meeting arose in response to an emerging awareness that extensive experience exists within the OSI network in the design and management of policy fellowship programmes, but this was not being shared in a systematic manner which would benefit all. The importance of improving the effectiveness of these programmes is critical as such policy fellowships are a key strategy being pursued throughout OSI in the current movement to becoming a more advocacy-focused organisation. In our capacity as policy communication trainers who work directly with all of these programmes, we noticed that managers and mentors in the different programmes were continually asking us the same questions and coming up against the same challenges. This was especially true for those fellowship programmes that are in the start-up phase. As more fellowship programmes are initiated throughout the Soros network, e.g. LGI Russian speaking fellowship programme, we felt this was an opportune time to bring interested stakeholders together to take stock of the wide and varied experiences of managing fellowships to date (which range from newly established to 7 years) and collaboratively work through agreed priority issues in order to generate a set of smart practices. Representatives of 7 fellowship programmes were present at the meeting:

- 'Policy Fellowship' (LGI-OSI)
- 'Fellowship for Young Russian Policy and Opinion Makers' (Institute of Public Affairs, Warsaw; Strategia, St Petersburg)
- 'International Policy Fellowships' (IPF-OSI)
- 'LGI Policy Fellowship for Russian-speaking experts' (International Centre for Policy Studies, Kiev)
- 'Policy Development Fellowship Program' (Open Society Fund, Bosnia & Herzegovina (BiH)
- 'Policy Fellowship Program' (Open Society Forum, Mongolia)
- Fellowship Programme (Central and East European Trust)

In an attempt to make the outcome of this meeting as practical as possible for all, we centred it on the idea of developing smart practices. The idea of smart practices versus the normally used concept of best practices was drawn from the work of a leader in the world of policy analysis, Eugene Bardach. In his paper '*Smart (Best) practices in research: Understanding and making use of what look like good ideas from somewhere else*'[1], he puts forward the idea

[1] Bardach, Eugene (2001)'*Smart (Best) practices in research: Understanding and making use of what look like good ideas from somewhere else'*. Economics Policy Institute Archive. Available on the World Wide Web. URL: http://archive.epinet.org/real_media/010111/materials/Bardach.pdf [31 May 2006].

that in order to effectively learn from others, we need to go beyond just a focus on what other people *do* in a certain situation (i.e. the normal understanding of best practice) but also understand what it is they *avoid doing* in that given situation. This broader definition for experience-based learning is particularly suitable for our purposes.

The resulting smart practices outlined in this report can hopefully act as a guide and lead to enhancing the effectiveness in establishing, running and achieving the maximum impact from fellowship programs and fellows throughout the OSI network. The aim is also to help those who have recently initiated/will soon initiate fellowship programs to avoid reinventing the wheel and avoid some of the common pitfalls that have occurred in many of the programs.

The facilitators would like to thank all participants for their active contributions prior to and during the meeting as well as Scott Abrams of LGI and Pamela Kilpadi of IPF who jointly funded this initiative.

1.2 Negotiating the agenda

A number of preparatory activities were conducted in advance to ensure the meeting was as focused and outcome-oriented as possible. The agenda was negotiated via email in 2 stages. The first stage involved all prospective participants identifying and negotiating the top 5 areas which would be the focus of discussion. The resulting topic areas selected in order of priority were:

1 Selecting the right fellow
2 Selecting suitable policy issues to research in the fellowship programme
3 Deliverables/products of the fellowship
4 Selecting and working with mentors
5 Capacity development and training in the fellowship

Secondly, participants were invited to brainstorm a more detailed agenda by elaborating on questions/concerns within each priority area. The detailed agenda is presented in Appendix B. This agenda formed the basis and orientation of the discussion in the meeting.

Finally, prior to the meeting, each fellowship programme represented was asked to describe their programmes under a number of categories. This overview compiled in a matrix (see Appendix C) ensured that we could focus on the substantive discussions in the meeting and not have to devote time to presenting the participating programmes. Further, it is hoped that this matrix can serve as a useful reference tool for fellowship programme managers in the future.

1.3 The working methods of the meeting

In order to make the meeting as efficient as possible break-out groups of 3 to 5 people were made and each group worked on developing smart practices for one of the priority topics. To avoid an over representation from any side of the fellowship experience, each group was made up of a mix of different voices (e.g. experienced and new programme managers, trainers, former fellows and mentors and others). Each group presented their findings and a facilitated discussion followed each presentation to consolidate the lessons learned. It was decided to drop the 5th topic of capacity development and training as there were not enough people in the group to make an effective 5th break-out group.

1.4 A road map for the report

The report is centred around the consolidated advice developed through the meeting. It starts by outlining the central themes and overarching recommendations which came out of the discussion. Next, detailed recommendations for the four main topic areas developed through the meeting are presented:

1 Selecting the right fellow

2 Selecting suitable policy issues to research in the fellowship programme

3 Deliverables/products of the fellowship

4 Selecting and working with mentors

In order to further illustrate the consolidated knowledge developed though the sections, illustrations of the approaches taken by participating programmes are presented in example boxes. Finally, we conclude by outlining specific next steps that should be taken to make many of the recommended ideas detailed become reality.

1.5 Central themes

- ***The emerging 'client' role of OSI fellowship programmes***

Throughout the meeting, the role of OSI programmes in commissioning research through fellowship programmes was discussed. All managers agreed that the policy fellowship programme's primary function is to build the capacity of local policy communities so as to promote a culture of evidence-based policy discourse and decision-making. Nevertheless, over time the more established programmes have seen some of the work of their fellows feed into the strategic decisions made in-house and also, have some impact in the intended policy arenas. Further, especially in the IPF and LGI programmes, there has been a change of direction over the last two years with a focus on taking on more senior and influential fellows with the hope that their research would more easily feed into the target policy debates and therefore, produce more direct impact. As such, we are trying to design much more specifically for the types of outputs that we want as the driving organisation, i.e. we are beginning to act more in the traditional role of client with our 'commissioned' researchers. This newly emerging 'client' role for OSI fellowship programmes is having a strong impact on the direction of these programmes and therefore, on their design and management.

- ***The constraints of the senior fellow approach***

This new strategic direction prompted important discussions through the meeting. The movement to taking on more senior fellows in the more established programmes has been an attempt to increase the direct policy impact of OSI fellowship programmes, i.e. that the recommendations developed through the research are more likely to be directly adopted as public policy. The assumption that this change of focus will produce the desired outcome and also the unexpected outcomes of this change of focus present a challenge for all those involved in designing and managing policy fellowship programmes in two ways:

- *The difficulty of timing and taking credit for policy impact*

In most cases, the process of change in public policy takes a long time and there are usually many people who will contribute their opinion as to how change will take place, i.e. from ministers, parliamentarians, public officials to, hopefully, all relevant non-governmental actors including policy researchers. Even in developing and transition contexts, policy change is recognised to be a long-term process of multi-lateral bargaining[2]. This commonly makes it extremely difficult to establish a direct link to a particular piece of research produced at a certain time and what finally gets adopted as public policy. Not surprisingly, the process of policy change does not have the habit of fitting neatly into a 12-month fellowship period. Further, in the bargaining process some broader ideas or specific suggestions from a research project may be adopted, some discarded and some modified. The opinions and interests of the power players will be represented throughout the process. Some sort of bargain will be struck between the winners and losers. And in the end, we have a big difficulty in attributing the investment made in a fellowship programme to a particular area of policy change.

This presents a big problem for all donors who need to show that their dollars turned into positive change. But by only trying to view the success of a programme through this foggy lens, we have little chance of seeing what the real outcomes and impact (in a broader sense) of supported research programmes are. Further, there is a danger that through our frustration at not seeing this direct impact, we choose more radical (and out of touch) solutions to try to achieve our unattainable goal. In evaluating the impact of their supported research programmes, the International Development Research Centre (IDRC) encountered this same issue and in the end decided to adopt the notion of 'policy influence' as the only practical benchmark for success given these constraints[3].

The idea of adopting the concept of influence over impact is a recognition that in most cases particular pieces of research will make a contribution to policy change rather than be directly adopted and therefore, in order to evaluate the success of the funding effort behind a policy research project we also need to have a way to gauge the extent of this contribution. In developing an evaluation framework around the term of policy influence for IDRC[4], Evert Lindquist included three categories under which the extent of influence could be measured:

1. Capacity building – not of just the researchers but of those they interacted with through the research;
2. Broadening policy horizons – changing the nature of a broader policy debate around an issue, e.g. so that a new understanding of the problem becomes part of the debate or a new policy option is considered;
3. Direct policy impact – feeding directly into policy change.

Viewing the effectiveness of support for policy research projects through the broader idea of policy influence could also help OSI programmes to more realistically assess whether this new senior fellow approach is in fact working and also could help us to see a more sustainable long-term view for fellowship programmes, as detailed in the next section.

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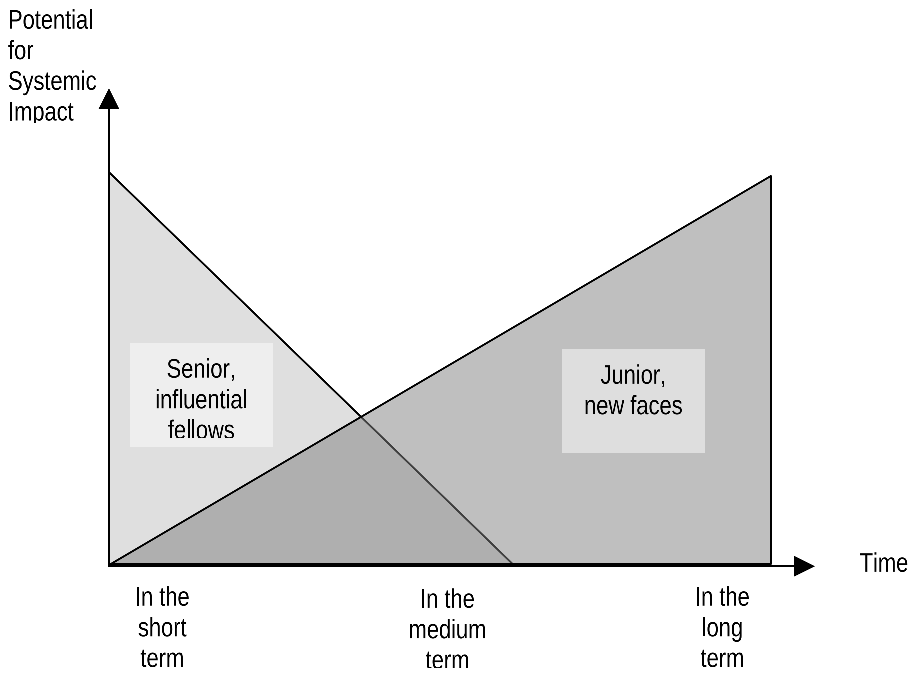
[2] Court, Julius and John Young (2003) *Bridging research and policy: Insights from 50 case studies*. Working Paper 213. London: Overseas Development Institute.
Global Development Network "Bridging research and policy: Lessons from the literature" Available on the World Wide Web. URL: http://www.gdnet.org/rapnet/other_resources/bibliography/Biblio_Summary.html [October 7, 2005].

[3] Carden, Fred (2004) 'Issues in assessing the policy influence of research'. (2004) *International Social Science Journal*. 179 Oxford: UNESCO . Available on the World Wide Web. URL: http://reseau.crdi.ca/uploads/user-S/10993220321ISSJ_05601010.pdf [October 7, 2005].

[4] Lindquist, Evert A. (2001) *Discerning policy influence: Framework for a strategic evaluation of IDRC-supported research*. Canada: School of Public Administration, University of Victoria. Available on the World Wide Web. URL: http://www.idrc.ca/uploads/user-S/10359907080discerning_policy.pdf [October 6, 2005].

▪ *Short-term impact vs. sustainable long-term systemic change*

Given the adoption of the term influence as a measure of effectiveness, we can see the impact vs. capacity-building debate as a false dilemma, as both clearly make contributions to positive policy change, although in different time scales. Through the meeting it was strongly stressed that most involved also did not see it as this dilemma and that both should continue to be supported. The danger in only focusing on more senior fellows is that these people will only be around in the short to medium-term and further will be inclined to work for change within the current structures. Further, if we keep supporting the same senior experts in particular communities, we reduce the potential for new and fresh perspectives to emerge. In contrast and more importantly, by also continuing to build the capacity of relatively young researchers with strong leadership potential, we are building the foundations for the systemic change of decision-making culture that is the ultimate goal of our work. The diagram below is a relatively crude representation of a certainly more nuanced reality but maybe useful in trying to design for an overall balance in a fellowship programme.



Further rationale for taking this balanced approach is provided in section 2.1.1

1.6 Overarching recommendations

The central pieces of advice that were prominent throughout the discussion were as follows:

- ***Beware of transfer - no one size fits all solutions.***

Ironically for a report dedicated to the consolidation of learning in order to help others in a similar situation, one of the main messages was beware of transferring practices without considering their suitability for your programme and context. For managers and designers, the smartest practice is to be highly aware of the current status and future direction of your programme and therefore, be able to make informed decisions about the type of approaches that will be suitable for your target programme.

- ***Take a reflexive, learning by doing approach to the management of the programme.***

Following on from the point of being aware of the constraints and opportunities of your programme and context, there will be a point when you will decide that a certain approach/practice is worth adopting in your fellowship. Once you have tried a new approach, go back and evaluate its effectiveness in producing the desired effect and continue, adapt or change your approach on the basis of your evaluation. Such a heuristic approach is crucial to shaping your programme in order to maximise its effectiveness as a sustainable initiative.

- ***Clearly and actively communicate to all those involved in the fellowship programme.***

Fellowship programmes face a particular challenge in that the main actors, i.e. fellows and mentors, change more or less every new cycle. Therefore, the central reservoir of institutional learning on fellowship programmes tend to be the managers and they have the difficult task of both setting and negotiating expectations and roles of all involved at the beginning of every cycle. It is crucial to the success of the programme that managers take a leading role in developing an active communication strategy, e.g. developing ToRs for all actors involved, to make this induction period effective and efficient. Fellowship programmes tend to flounder when people are unsure of their role and their direction.

- ***Get outgoing fellows and mentors to communicate directly with incoming fellows and mentors.***

One of the ways to lighten the communication load on managers is to facilitate the exchange of experience between fellows and mentors finishing the programme and those starting. It will not be enough to put them in a room and let them at it; this must be a targeted and facilitated discussion which leads to the most important questions being answered.

- ***Clearly set the minimum levels of engagement for fellows and mentors.***

For both mentors and fellows, it is important that they know from the start what are minimum levels of engagement, the deliverables and levels of quality expected. Clearly stating these minimum levels from the beginning allows everyone to see clearly see the task ahead of them and allows them to make suitable plans to hopefully achieve way more than these minimum benchmarks.

2.0 SPECIFIC RECOMMENDATIONS BY THEMATIC AREA

The detailed discussions in the meeting were around the following the four main topic areas:

1 Selecting the right fellow

2 Selecting suitable policy issues to research in the fellowship programme

3 Deliverables/products of the fellowship

4 Selecting and working with mentors

The decision to focus on these topics was negotiated in advance of the meeting with the participants via email.

2.1 Selecting the right fellow

Through the initial email brainstorming period and also in the meeting, two main themes were developed in this area:

- Developing effective selection criteria
- The process of selecting fellows

An additional theme (and a very interesting one) was elaborated in the meeting:

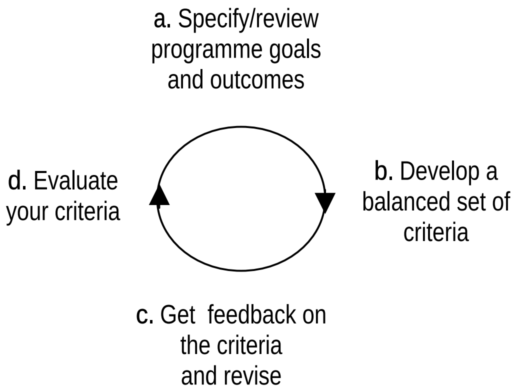
- What is an acceptable level of failure within a fellowship programme?

2.1.1 Developing effective selection criteria

The ideal fellow has a balance of the following characteristics:

- experience;
- qualifications;
- skills (researcher/analyst, advocate, communicator, facilitator, negotiator);
- commitment to the issue;
- influence/visibility in the target policy arena;
- is representative of a particular target group (gender, minority, region);
- and ultimately the person who will produce “the goods”.

In order to find the correct balance and focus in establishing selection criteria which are suitable for a specific policy fellowship programme and are a realistic reflection of the capacity of the pool of potential candidates, the following 4 stage cycle approach is recommended:



a. Start by clearly defining the goals of your fellowship given the constraints of your programme, your potential target group and the target issues and context.

It is undoubtedly difficult to get this balance right in setting evaluation criteria, but the starting point in making a good decision is for managers to clearly elaborate the goals of the programme and the expected outcomes (from capacity building to deliverables to level of policy impact expected). This elaboration of the goals and outcomes also needs to be firmly framed within a clear understanding of the constraints:

- *The programme* - what can one person/group realistically produce given the time and resources available within the fellowship?
- *The policy research/analysis capacity of the target grou*p – how realistic is it to expect the potential candidates to produce the type of policy advice that policy makers will perceive as useful through the fellowship?
- *The target context and issues selected* – what is the current level of appreciation and demand for strategic policy advice in the target policy communities?

b. Look for the right balance in the elaboration of a set of selection criteria suitable for your programme and context.

Once you have defined a realistic set of goals and expected outcomes for your programme, this should clearly direct you in engaging with a set of selection criteria dilemmas that face all in the design of a policy fellowship programme. In the following list developed through the meeting, there may be considerable overlap between categories presented, but this is intended to illustrate the nuance of focus needed in the setting the criteria.

The people

- **Close associates vs. unknown applicants**

Do you invite candidates who are already close to your organisation to apply or do you have an open call and hope for the best quality applications from the target groups?

This question is especially relevant for national fellowship contexts and in our experience the open call for these contexts seems to work better. It also works as a way to identify those outside of your normal circle working on the target issues.

- **quality of application vs. representative of a specific target population**

What is the balance between choosing the best-submitted applications versus including members of a specific target population based on age, gender, minority or regional representation?

- **individuals vs. teams**

Should you only accept applications from individuals or should you also allow groups of people to apply for one fellowship?

The main issue is to what extent the focus of your programme is on capacity-building. Most fellowship programmes allow only individuals to apply based on the rationale that the individual will learn most from going through all stages of the project on their own. Nevertheless, this is a little artificial as most policy research is done in teams who have complementary competencies. But it is also usually done in institutions where individuals have clearly defined roles and the danger in accepting group applications, as many in the meeting stated, is that one or two individuals in the group actually end up doing most of the work (and the learning).

- **background/experience/qualifications vs. commitment to the issue**

What is the correct balance in choosing those who have the right experience and academic qualifications versus those individuals who work directly with and are passionate about the target issue?

The classical example of this dilemma is between the academic and the NGO person. The difficulty is to find candidates who have the expertise to conduct sound methodological research and who are also committed to producing practical solutions to improve a target situation on the ground. By only focusing on the academic qualifications, there is a danger of producing high quality, but not policy-relevant findings. Examples of this type of outcome are too numerous to mention. In contrast, by only focusing on the NGO person, the danger is producing research that is policy-relevant but may not appear objective enough.

> **Example box – some fellows can be too value-driven**
> A fellow on the LGI programme who had a background in watchdog NGOs produced a policy paper that was so uncompromising in its position towards the government that LGI declined to publish it. It did not come across as the product of balanced, empirical research but was just more like pure polemic.

The skills

- **researcher vs. advocate**

Should the focus be on selecting those who have the capacity to produce good research or on those who have the skills to push for change in a political arena?

This is commonly another dimension of the classical academic versus NGO person dilemma. This is a particularly difficult one to handle as there are many factors in this dilemma. First, many researchers do not aspire to being advocates at all – they would rather remain in the much more 'expert' role of the traditional advisor, i.e. speaking truth to power (see example below) and commonly perceive advocacy as a dirty business. Second, it is extremely difficult to find an individual who has both the strong analytical skills it takes to be an effective researcher and the strong communication and negotiation skills to be an effective advocate.

> **Example box – researchers can be uncomfortable playing advocate**
> A quote from a researcher working with IDRC: "I mean, you have to be like Erin Brockovitch, no? You have to have the legs, you have to have the looks, you have to be smart, you have to do the research….dissemination work, publication work…I said, come on, I'm a researcher"5.

[5] Carden, Fred (2004) 'Issues in assessing the policy influence of research'. (2004) *International Social Science Journal*. 179 Oxford: UNESCO . Available on the World Wide Web. URL: http://reseau.crdi.ca/uploads/user-S/10993220321ISSJ_05601010.pdf [October 7, 2005]

Seniority and influence

- **Senior influential fellows vs. more junior, new faces**

In order to increase the immediate direct policy impact of the programme, should senior fellows who are already influential in the target policy arenas be chosen over younger, newer candidates?

The logic of choosing senior fellows is that there will be little effort required to get the insights developed through their research projects into the target policy debates, as they are already opinion shapers or leaders in their fields. As such, the chance of more direct policy impact is increased. However, programme managers need to be clear whether their programme goal is this more short to medium-term policy gain or on the more long-term aim of creating a strategic, evidence-oriented decision-making culture in the target context. If the latter is more the case, then building the capacity of the new faces who have the potential to be leaders in the longer term would seem to be the way to ensure such sustainable impact. Maybe a balance of both could provide the perfect pincer movement to both catalyse and ensure positive change.

A second aspect of this dilemma is openness to new ideas. It was the opinion of the group that older, more experienced fellows tend to come to the research project with quite fixed ideas on what the outcomes should be; whereas younger people need firstly to learn a lot about the target issue, the context and the practice of decision-making and therefore, start at a point more in line with the intended role of empirical researcher, i.e. they are *de facto* more open to new perspectives. Further, many more senior fellows tend not to take up the training opportunities offered though the programme, as they are less likely to perceive that they have capacity gaps. Nevertheless, many in the group reported that few of the senior fellows have a good grasp of the methodologies and communication tools of the broader policy perspective. As a result, they have tended to produce more academically-oriented products.

Example box – some senior fellows develop less empirical arguments

In our role as trainers, we are commonly asked to give feedback on draft papers. In giving such feedback to a number of more senior fellows, it has been our impression that what they presented was more the informed insight of an expert, insider, rather than an argument based on extensive empirical research. A lot of informed opinion, but not a lot of new evidence.

- **Quality of application vs. actual time available**

Is the potential candidate both willing and able to free up enough time to adequately complete the research project in the given timeframe of the fellowship?

This is commonly, although not always, another dimension of the senior vs. junior dilemma. Policy research takes time – a lot of time. The minimum that most programmes seem to demand is that the fellow can commit at least half her time to the project during the fellowship cycle. In direct contrast to this, it is those fellows who have connections to many organisations (i.e. are probably already overbooked) that we tend to favour.

c. Get as much input on the definition of selection criteria as possible.

Simply put, the more input you can get on the finer aspects of defining your programme goals and outcomes, as well as the choices you make in dealing with the selection criteria dilemmas, the better will be the outcome. This should include board members, mentors, managers, trainers and even alumni fellows, if possible.

d. Evaluate the effectiveness of your criteria and start the cycle again.

Once you have used your initial set of selection criteria, been through a full fellowship cycle and seen the outputs, it is useful to go back and evaluate whether the criteria have served their purpose. It was agreed in the meeting that we should evaluate the criteria on the basis of meeting the minimum hurdles of effectively guiding us to choosing people with the desired skills, knowledge, experience, time available, commitment and influence. This should be done outside of considerations of whether selected fellows subsequently succeeded in completing their research projects.

2.1.2 Tools and processes to help effectively select fellows

There was no in-depth discussion of the details of effective mechanisms in selecting fellows but advice in important areas did emerge:

- ***A two-stage selection process based on negotiating the research proposal is best.***

The basic premise is that you increase your chances of choosing suitable fellows by having an opportunity to get to know them in person and asking them to complete an initial task (usually the development or review of a research proposal) before you actually sign a contract for the full fellowship. Two examples of this approach were outlined in the meeting: one a more formal approach used in BiH and one a more informal approach used in Mongolia.

> **Example box – two-stage selection procedures**
> In the national fellowship programme in BiH, candidates are initially selected on the basis of a short overview of their proposed project. A group of 12-15 is selected and they are provided with training in policy research and an opportunity to produce a draft research proposal and get feedback from trainers. The redrafted research proposal is then submitted as the formal application for the fellowship. The board has been very happy with the increase in quality of the proposals submitted and has normally ended up selecting more fellows than initially intended.
>
> In the national fellowship programme in Mongolia, fellows are selected and have a month or so to work on developing and focusing their research proposals to the point that the managers and mentors are satisfied. It is at this point that the contract is signed.

The two examples given are from fellowships in national contexts and such negotiation and training processes are undoubtedly much easier to manage within such a local context. Nevertheless, using the development and redrafting of the research proposal as the first task in the fellowship seems like an extremely useful exercise in planning the research focus and the specifics (e.g. budget and timeline) as well as an initial opportunity for all involved to have a clear understanding of the expectations. It is also useful to clarify upfront to fellows when they initially submit their research proposal, that this is the beginning of longer negotiation process as many have tended to believe that the point of proposal submission is, in fact, the end of the research planning process.

- ***Phone interviews help in making the first cut; actual face-to-face interviews are best.***

If it is not feasible for you to interview candidates face-to-face, then a phone interview can help you to make the person to paper connection that will help you in making the first cut.

> **Example box – the importance of speaking to candidates before selection**
> An LGI fellow was selected on the basis of a full and developed paper application in English. Once selected, it transpired that the fellow did not speak English at all and had his application translated from his native language.

- ***Get as much feedback on candidates as possible.***

Many of the more experienced managers reported that at the final selection stage they put together a shortlist and try to get feedback on the candidates from as many people within or connected to their organisation as possible. Even in more international fellowships, it is a relatively small group of people who will apply. Many already come from partner organisations or attend the same events as those within your circle, i.e. there are not so many degrees of separation. So, it is relatively easy to get useful feedback for the selection process by passing around the shortlist.

- ***Avoid professional grant seekers and those trying to seek funding to continue their own projects, e.g. completing their PhD.***

In trying to identify professional grant seekers, focus on the diversity and number of trainings and conferences attended in the last few years. The types of fellows we are looking for should be trying to develop in focused and balanced ways, not attending 22 trainings in the last 2 years and/or had 5 different fellowships in 5 years.

There are some people who see policy fellowships as an opportunity to continue or finish their already on-going work, e.g. the most obvious being their PhD. We obviously want to find fellows with suitable experience and background, which may include a PhD in a given area, but what we don't want to do is fund their actual academic studies. Even if there is considerable overlap in the topic areas, the chances of producing useful policy advice from a PhD thesis are minimal.

In order to try to identify those who have their own agenda for the research, it is useful to request that candidates submit a letter of intent or statement of purpose in their application. Many managers reported the easy identification of those who want to use the fellowship for their own purposes using this method.

> **Example box – guidelines for a statement of intent**
> In BiH, applicants are asked to write 1-2 pages in the statement and answer questions such as the following:
> - How is the fellowship programme relevant for you?
> - Why do you want to participate in the fellowship?
> - How will you benefit from participation in the fellowship?
> - How do you intend to use the skills and capacity you develop through the programme?

2.1.3 Acceptable level of failure in a fellowship programme – 10 to 20%

As stated above the ultimate selection criterion is the selection of fellows who can produce the goods, i.e. be successful in the delivery of high quality research, policy papers and ultimately push to have the ideas accepted in the target policy community. Nevertheless, there seems to be a myriad of reasons (from personal to professional) as to why some fellows do not actually complete the task assigned in the fellowship and this led to a consideration of a level of failure that is somewhat inherent even in the best-run programmes. The figure of between 10 to 20% was agreed by participants and it is hoped that such information would provide a useful benchmark for those starting off.

> **Example box – we can try our best but some fellows will fail**
> At least 3 managers in the meeting reported conducting the most rigorous of selection procedures (including both face to face and telephone interviews) and being very happy both on paper and in person with certain fellows that they selected. However, for reasons that remain unclear to the managers, these fellows have never completed their assigned work. One manager even spoke of a fellow even trying to 'fake research'.

2.2 Selecting suitable policy issues to research in the fellowship programme

Depending on the approach taken, the issues researched tend to emerge from the following sources:

- The institution itself, i.e. choosing topics to fit their objectives and feed into agenda setting for their programmes;
- Driven by mentors or policy advisors;
- Inspired by applicant proposals.

The basic premise of the whole discussion in the meeting was that *the choice of policy issue has a strong influence on the quality of learning achieved and the products produced* from a fellowship programme. As such, the discussion of this topic centred mainly around the balance of setting:

- broad to narrow topics;
- the particular challenge of policy process topics;
- whether to choose the 'hot' topics of the day or have a more long-term view of potential influence.

2.2.1 Broad to Narrow

One of the broadly agreed principles in this area was that broad topics lead to broad papers, i.e. the generation of policy advice that's not very easily usable. So, overall we need to get specific in setting our policy issues. Just how specific you get was subject to dispute. Two competing pieces of advice emerged based on the perception of the capacity of potential fellows:

- ***Option 1: Keep the announced policy areas relatively broad, make specific suggestions within the topic, but allow applicants to come up with concrete and narrow proposals within the area.***

The recommendation above is mostly for those programmes which want to balance all 3 of the sources of input in defining their policy topics. Essentially in taking this approach, we can allow a board and programme managers to substantially frame the research area, yet leave enough space for applicants to suggest a specific direction. This also allows fellows the space to prove the depth of knowledge they have in the specific target area even within the application process. Further, it allows for the target group to identify what they perceive as the real problems on the ground within the given framework, which may be very helpful for donor organisations who may not be as close to the grassroot issues as the potential fellows.

> **Example box – Broad to narrow with some space**
> In the current call for proposals for the BiH policy fellowship programme, under the broad topic of 'B&H economy in transition to the EU' the following 3 narrower focus areas are suggested:
> - Entrepreneurship and SMEs policies
> - EU and B&H energy sector
> - B&H agricultural prospects

- ***Option 2: It is better to define the policy topics in-depth in advance.***

By choosing this option, the programme acts more in the role of the traditional client by clearly specifying in detail what is wanted. Many of the managers who proposed this option do so in recognition of the limited ability/capacity of potential individual participants to identify and define a policy problem and a desire for more direct policy impact on the basis of the research.

> **Example box – Narrow topic definition**
> In the current LGI call for applications, researchers are being sought to apply to conduct the following type of research:
> - Conduct a specific type of spatial analysis in 2/3 urban municipalities
> - Compare the results of the analysis to the current strategic plans for dealing with marginalized communities in the municipalities.
> - Make specific recommendations as to how to improve their current policy approaches.

2.2.2 The particular challenge of policy process topics

Traditional areas for policy research tend to be case studies of specific sectors in a specific context (e.g. public health, water provision, taxation). In such cases, it is clear that the outcome of the research should attempt to provide practical solutions for the target sector in the context researched. However, in trying to understand, explain and improve the decision-making process in transition countries, many fellowships have set topics which seek to map the current policy-making process. This has presented a particular challenge for fellows and many of the outcomes have been weak in this topic.

The main weakness in these studies has been a result which produces *research about policy-making (i.e. which describes the process), and not the intended outcome: research for policy-making, which gives specific suggestions on practical changes which should be made in the process in the target context.*

As such, the following recommendations were made:

- ***In process groups, there is a need to specify the methodology and target audience from the beginning and more mentoring is needed throughout.***

In order to get the focus on the practical outcome orientation from the beginning, an in-depth clarification and negotiation of the methodology and intended target audiences for the research needs to be done up front. Many fellows in such process groups tend to float without much direction if such a negotiation does not happen. In fact, many managers in the meeting suggested that a higher level of engagement from the mentor is needed throughout this type of research project.

- ***It may be easier and more effective to get process insight from sectoral studies than specific process research.***

In traditional sectoral studies, it is standard for researchers not only to come up with specific solutions for the target problem, but for these solutions to be feasibly implementable given the constraints of the target context. Among other things, this requires an in-depth understanding of the 'practice' of policy-making in the target context, i.e. the decision-making process, opportunities for influence, the people involved, their interests and values, policy windows. In essence, this means that the natural by-product of a sectoral study is a narrow study of the policy-making process. Indeed, it is not uncommon to see process change recommendations in sectoral studies. Therefore, in wishing to gain insight into the policy-making process, it may be more useful to ask fellows from the sectoral studies groups to give their insight and piece that together and actually avoid the difficulties of having specific process study groups.

> **Example box – LGI fellowship's most challenging topic to date**
> The most challenging LGI fellowship programme topic to date was 'Mapping the policy process'. Fellows tended to fall between the two poles of the project, neither providing enough insight into the broader process itself, nor coming up with usable recommendations for process changes in the sector that they had studied.

2.2.3. Selecting the hot topics vs. long-term policy issues

In the establishment of policy fellowship programmes, it is the ultimate aim of all mangers to see the results of research produced through the programme having direct impact on public policy reform. However, consideration of the capacity of potential fellows, the normally slow pace of change in the policy process and the need to provide the correct motivation and an authentic learning experience for fellows make the choice between the current 'hot' policy issues or a more long-term policy impact perspective a difficult one. The following recommendations provide a framework in which to consider a suitable balance for the particular context of a fellowship programme.

- ***Be realistic about the type of policy influence you can expect from your fellows and choose more longer-term policy issues.***

Policy research is often said to be "tomorrows solutions for yesterday's problems", i.e. what is inherent in policy research is that it commonly commissioned based on the current agenda topics, but is too late in producing answers (which are also commonly perceived as too radical!). Some managers see a combination of this timing issue and the low level of capacity of their fellows as governing their choice of more long-term policy issues. As one manager put it in the meeting: you don't have a team of senior researchers in an established institute who can react in a short time. Nevertheless, this choice of topics which have the potential for more longer term impact should not be underestimated, especially in transition countries where there is a very small corpus of existing policy research and therefore, any in-depth targeted research has a good opportunity to influence the policy discourse and so, lead to longer term reform.

> **Example box – longer term policy influence**
> One LGI fellow reported that through the policy fellowship period, the issue he was researching (decentralising education) was not on the government agenda in his country. 6 months after the fellowship ended and with a change in government, the issue of education reform was put firmly on the agenda and his paper was an important source for the policy makers at that point.

> Another LGI fellow reported that her paper on housing the poor has been an important source to catalyse discussion of the issue among people outside government. To date, the issue has not moved onto the government agenda.

- ***But make sure you choose real policy problems to motivate the fellows to conduct real policy research and therefore, maximise learning and potential for policy influence.***

It is critical for all the intended outcomes of a fellowship that participants have the opportunity to engage in the real business of policy research. Therefore, it is crucial that issues widely recognised as policy problems in the target context are chosen, i.e. there is/has been broad discussion of the issue by multiple stakeholders. The danger here is the choice by a programme to go for issues that they would like to see on the agenda, but have not been extensively debated or understood in the target arena. For the researcher, trying to build insight into such an issue will be a challenge as it will be very difficult to apply the normal tools of policy research, i.e. choosing a real case, conduct in-depth research with real subjects who have experienced (and perceive that they have experienced) the effects of a policy, and so, put forward empirically-driven arguments. Second, researching the real issue will motivate the fellow to more effectively engage in all aspects of the project as they have an opportunity to make a real contribution.

2.3 Deliverables/products of the fellowship

In all participating policy fellowship programmes, the basic task of the fellow is to conduct a research project. However, depending on the focus and intended objectives of the programme, a number of different products can be required: research proposals, research papers (in a more academic style), policy papers (such as a longer policy study and/or a shorter policy brief), conference presentations, or advocacy plans.

In this third element of the meeting, the discussion centred on two main topic areas:

1. The types of product/deliverables for a fellowship programme.
2. How to ensure the quality and relevance of the products produced

2.3.1 The types of products/deliverables for a fellowship programme

- ***Policy fellowship programmes should seek to contribute to the development of a corpus of policy-relevant research.***

For transition countries that do not have an established tradition of producing policy research, making a contribution to the corpus of locally developed policy research is a basic and primary objective. However in seeking this objective, we should never forget that we are trying to inform local policy debates with usable and timely policy advice, not just fill library shelves.

- ***A research/policy paper based on the findings of the research is the minimum we should require of a fellow.***

For all participating programmes, the most basic requirement that the fellow needs to fulfil is the production of a longer research-based paper (e.g. 40-50 pages) in the format that is required by the fellowship (commonly a Policy Study[6]). In addition, some programmes can require various other products:

- advocacy tools, e.g. policy briefs, presentations, advocacy plans

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[6] For example, as detailed in: Young, Eóin & Lisa Quinn (2002) *Writing Effective Public Policy Papers: A Guide for Policy Advisers in CEE*. Budapest: LGI/OSI.

- administrative tools, e.g. an activity report detailing the milestones and activities of the research, budget, timeline.

Finally, it was also suggested that there could be an option to allow fellows, mentors and managers to negotiate the products produced based on the nature of the research work and the intended outcomes, e.g. a toolkit for various audiences. But of course, the programme goals and desired outcomes should be what governs the specification of products.

> **Example box – expanding the products required**
> In BiH this year, the programme has decided to place more emphasis on the potential impact of the research produced and will now require that fellows produce not just a longer policy study, but also a short, more advocacy oriented policy brief and also, present the findings of their research in a fellowship conference (to be attended by potential stakeholders).

2.3.2 Ensuring quality and relevance of findings/outcomes

In addition to the selection of relevant, researchable topics, further recommendations to try to ensure the production of quality outcomes were made in the meeting. Two categories of recommendations were developed in this section: first, the things programmes can do up front so that expectations are clear and the real work can begin in earnest; and second, how the programme/mentors evaluate and react to poor quality work.

- ***Clearly communicating the requirements of all elements of the fellowship and providing details of what you expect maximises the likelihood of producing better quality products.***

From the start, setting and commutating clear expectations of what is required and how the fellowship works will help all involved to understand their roles (fellows, managers, trainers and mentors). This extends from:

- the most basic description of the fellowship programme,
- the people involved,
- the project timeline and milestones,
- budgeting, contractual and financial issues,
- the deliverables/products expected and when.

In addition, giving detailed descriptions of your expectations for the primary products required would help to guide the work and clarify what are very easily confusable terms like policy paper.

- ***Try to develop clear statements of the minimum level of quality that you expect.***

In order to clarify up front the expectations for fellows, it is useful to clarify the minimum level of quality expected up front. This may be done through the development and dissemination of a set of programme evaluation criteria and/or illustrating the criteria using a quality paper previously produced in the programme. Such a set of criteria could include such categories as potential for impact, methodological soundness, policy relevance, quality of the policy problem definition, quality of argument/evidence generated to support the position put forward, clarity and quality of policy paper.

- ***Make the statements of what is expected an annex to the fellowship contract.***

In order to set the quality agenda and avoid vagueness and miscommunication from the very start, it would be very beneficial to make the descriptions of the expected products and the minimum level of quality expected part of the contract between the fellow and the programme. This is planned for the 2006 fellowship in BiH.

- ***Strategically designing training interventions during the fellowship cycle can significantly improve the level of quality.***

In the many fellowship programmes that we work in as trainers, managers and fellows themselves have noticed the significant contribution that training workshops and follow-up support play in improving the quality of products produced. There is much confusion and misunderstanding especially about the different types of policy papers that are commonly required from fellowship programmes and training in these areas has proven effective in clarifying these expectations. At the moment, training support in policy research methodology and proposal writing, policy paper writing and analysis, and advocacy are available through the OSI network. These workshops should be integrated into the design of the fellowship programme, delivered on a needs basis, and the timing of the training intervention should be based on the current stage (and therefore, the current needs) of the fellows during the cycle (see example below).

Example box – needs based training interventions

In BiH and IPF programmes, the following trainings are provided at the times indicated:

- Start of the fellowship: Workshop on policy research methodology
- After the data collection stage: Workshop and tutorials on policy paper writing and analysis
- After the longer policy study has been finalised: Workshop on advocacy and policy briefs

- ***Withhold payment of fellowship stipends if submitted work fails to meet the minimum required quality standards.***

The minimum quality standards developed should relate directly to the submission of work at the different milestones through the fellowship cycle. Payment of instalments of the fellowship stipend should be directly related to meeting these standards. If fellows fail to meet the minimum standards (after mentor evaluation), payment of the next instalment should be withheld until they do so. Continued failure to meet the standards should put them in danger of being removed from the programme. Obviously, this process should be clearly stated and understood from the beginning and included in the contract.

- ***Have all final papers peer reviewed, as mentor maybe too tied to a positive outcome.***

The quality of work produced in a fellowship group is indirectly a reflection of the quality of mentor input. This can potentially present a situation where mentors are inclined to a more positively review the work produced than a more objective observer. As such, having the final submissions peer reviewed by other experts (and also clarifying from the start that this will happen) will help to ensure a higher quality of outcome.

2.4 Selecting and working with mentors

The two main issues under consideration in this discussion were the selection of suitable mentors and setting expectations for and working with mentors.

2.4.1 Criteria for mentor selection

Just as the selection of the right fellows presents a set of dilemmas for programme managers, finding suitable mentors to guide them presents a similar challenge. Programme managers rely on mentors to be the primary facilitator of quality outcomes from the fellowship programme. As such, choosing effective mentors is crucial to the programme. The ideal mentor would have a combination of the following skills and qualities:

- Suitable academic qualifications;
- Policy research experience or certainly knowledge of the broader public policy perspective;
- In-depth insight into policy research methodology and communication tools;
- Deep subject area knowledge of the policy issue in question;
- Knowledge of the local context and the target policy issue in that context;
- Knowledge of the people and the decision-making process in the target context;
- Access to/influence over target stakeholders so the potential to be a local bridge to relevant policy actors;
- The willingness and time to commit to the mentoring process;
- Excellent communication and teaching/mentoring skills.

It has proved basically impossible to find one person who has this range of qualities and so, most programmes commonly involve at least a pair of mentors for each group whether they are called mentors or not. For example, it is not uncommon for both managers and trainers to give mentor-type input in some of these areas. Various recommendations concerning this selection dilemma were brought up:

- ***Over time, it is useful to build up a pool of mentors for the programme.***

As stated above, it is as difficult to find good mentors as it is to find good fellows. So, if you do find them, try to hold on to them and continue using them. Through a more long-term engagement, the mentors become even more effective as they learn more about the process and the programme and by corollary, managers do not have to go through the whole mentor induction process every new cycle. It may be difficult to continue using the same mentors given the usual movement of issue and context focus in new cycles of fellowship programmes, but it is worth considering given the inherent problem of finding good mentors.

Example box – longer term engagement of mentors

In IPF, they have recognised the benefits of being able to work with the same mentors over a period of years, as there have been a number of continuing topics, e.g.:

- The challenge of wider Europe
- Open Muslim societies
- Open society threats in the former Soviet Union

- ***It is useful to use a combination of local and international mentors.***

One of the assumptions of starting a fellowship programme is that there is a low level of policy-making capacity in the target countries. This has been evident to many programmes as few of the local experts that have been hired as mentors have had the required in-depth knowledge of the broader, strategic policy perspective and its associated research methodologies and communication tools. As such, they have put together mentor teams made up of a local expert (for local content and context specifics) and an international mentor (for the methodological elements). Nevertheless, we should not underestimate the key importance of local mentors in always keeping the research outcomes relevant and embedded in the local context.

> **Example box – combine local and international mentors**
> In the BiH and IPA/Strategia programmes, they have used this combination and give them the following titles:
> - BiH:- Local Mentor and Methodological Mentor
> - IPA/Strategia:- Mentor and Policy Advisor

However, it should be noted that it is more difficult to have this combination of local and international mentors without a common language. In many OSI fellowship programmes (even the national programmes), it has been usual for the main interactions (between fellow, mentor and trainer) to be conducted in either English or Russian. Without this *lingua franca*, the process of translation of all conversations and written feedback represents a considerable obstacle to efficient and fruitful work.

- ***It may be useful to consider the looser concept of resource people, as well as mentors in putting together a suitable support structure for fellows.***

Depending on the particular programme and the people involved, fellows already commonly get advice on their work from many sources: their mentor(s), programme managers and trainers. By being realistic about the capacity of the mentors available to support particular research groups, it may be necessary to get support from other resource people, e.g. a suggestion was made in the meeting that over the years there is a considerable number of alumni fellows from OSI policy fellowships in most transition contexts and that these people could be drawn upon in this capacity.

> **Example box – fellows choosing their own mentor / resource people**
> In BiH, the management has judged that the fellows chosen in the current cycle have strong knowledge of their issues and the related decision-making processes and as such, do not need an assigned local mentor. Instead the programme has put together a pool of potential local mentors/resource people and the fellows can choose to engage them as they wish. But they will continue to be assigned an international/methodology mentor.

- ***One route to policy impact is the choice of already influential mentors.***

If a programme is particularly interested in having impact in the short-term in a certain issue, it may be a useful tactic to engage a mentor who can act as a local bridge to relevant policy actors. By working directly with fellows over the normal period of a fellowship cycle on a topic of interest to both, it is likely that the mentor will choose the best people and/or insights developed through the research and make them part of their own work, thus facilitating some level of influence, if not direct impact.

> **Example box – influential mentors facilitate impact**
> The IPF and LGI programmes have both had research groups on the same topic and used the same mentor. This particular mentor is a senior researcher in a respected think tank in Brussels. During the fellowship period, he directly involved fellows from both programmes in work that the think tank was doing in similar topic areas. As the institution is well recognised, their contribution

has immediately fed into important policy debates in the EU.

2.4.2 Working with mentors

Overall, the focus of much of this discussion was on the crucial induction/expectation-setting stage with mentors. In addition, recommendations were made on how to react in situations when the relationship between mentor and fellow is not working well.

- ***It is best to invite known mentors, rather than have an open call.***

It is obvious that the choice of the right mentor is too crucial to the outcome of the fellowship process for this decision to be based only the type of information you normally collect through an open call. Mentors need to have demonstrated qualifications and abilities and already be a trusted partner of your institution or a sister institution.

- ***Get the mentor involved in the process as early as possible.***

Giving the mentor the needed time and opportunity to get a good understanding of the fellowship programme, the organising institution and the focus of the chosen issue is an important starting point in the induction and expectation setting process. So, including them in as many steps as possible at the start of the process, e.g. fellow selection, is an important learning opportunity.

Example box – Getting mentors involved early

Both the IPF and LGI programmes have mentors involved in the writing of terms of reference for the chosen issues (originally chosen by their boards) and the fellow selection process.

- ***Programme managers must clearly communicate programme expectations to mentors.***

Programme managers must take the responsibility to create enough clear information and opportunities for mentors to have a very clear idea of their role at the beginning of their involvement. As with all elements of the fellowship programme, this involves starting by working with all in the programme to develop a clear terms of reference for mentors detailing all aspects of the role of the mentor which could include:

- a clear statement of the role and objectives for the mentor;
- type and level of engagement expected through the fellowship process;
- timelines and milestones in the fellowship cycle;
- expected level of mentor time commitment through the cycle (emphasising that mentorship is a big task!);
- a clear statement of roles of others involved in the process, i.e. programme managers, resource people, trainers etc.;
- reporting responsibilities;
- maybe a section of Frequently Asked Questions (e.g. what to do when *this happens*?);
- lessons learned from the past;
- useful readings (maybe even this report).

Obviously, just the production and dissemination of the document will not be enough; there must also be opportunities to negotiate the aspects that remain unclear to the mentor. This could be done in a workshop setting, although it is probably best not to call it a workshop or training, but more of a mentor orientation meeting. It would be best if the meeting were facilitated by a programme manager (or programme trainer) and also included past or continuing mentors and even, alumni fellows if possible.

- ***It may be useful to use a quality policy paper produced in the programme as a holistic way of expectation setting.***

To supplement the ToR and the discussions mentioned above, it may also be useful to give mentors an example of the type of product you would like to see out of the fellowship. An examination of the deliverable at the beginning of the process could help to focus and clarify the type of paper expected (a common confusion) as well as numerous methodological and quality aspects of the fellowship mentoring process. This discussion would be a very insightful part of any mentor orientation meeting.

- ***Encourage mentors to attend training sessions provided to the fellows.***

As another way of allowing mentors to negotiate the research project at any stage in the cycle, it is useful for them to attend the trainings provided to the fellows. It is rare even in national fellowships for the whole research group to meet together and so, mentors should be encouraged to attend the trainings as an opportunity to further negotiate their projects with their group. This is especially useful at the start of the cycle, as there is commonly a tacit assumption among fellows and mentors that all in the group have the 'same' idea of the research methods, elements of the topic to be covered and the products to be produced. This, in fact, is extremely rare. There also might be some status (or perception of status!) issues in fellowship groups, especially at the start of the cycle, that hold individuals back from initiating the type of in-depth discussion that they really need to clarify their projects. An interactive training is the perfect catalyst for this discussion.

> **Example box – Mentors who have valued training opportunities**
> Two past mentors in the LGI programme have attended the policy writing training delivered to the fellows at the very beginning of the fellowship cycle. Both reported that the training provided the opportunity to clarify many aspects of the project and of course, especially the intended outcome. Also one of the mentors realised through the training that the group and her needed further support in the methodological aspects of policy research.

- ***Keep mentors focused on content and methodology and out of issues of contractual compliance.***

The mentor is the facilitator and arbiter of quality in the research project and to successfully produce quality in a policy research project over the period of a fellowship cycle is a considerable achievement. Therefore, the mentor involvement in any contractual obligations other than his/her own (e.g. in reporting, budgeting, setting schedules for the group) should be kept to a minimum. This obviously should mainly be the responsibility of the programme manager.

- ***Programme managers need to take responsibility to monitor the work of mentors.***

There is a clear contractual obligation established between the fellowship programme and the mentor and the manager needs to ensure that these obligations are being met to an adequate standard. However, such a control mechanism is sometimes hard to enforce as mentors tend to be individuals of high standing and reputation and therefore, it can be difficult to both get and give negative feedback to such people. Establishing clear and regular lines of communication between the manager and mentor and increasing (and being seen to increase!) your involvement at key times in the cycle (after the data collection period, through paper drafting etc.) should allow the manager to easily know if everything is going according to plan.

It is also useful to keep lines of communication open to the fellows themselves and even from time to time ask them how things are going with the mentor. In this situation, it may be difficult to get critical feedback especially in national fellowship contexts where the mentor could possibly be influential in the long-term career advancement of the fellow. Nevertheless, if managers notice a lack of quality in the mentoring, they may have to take a delicate approach but it is probably better for all concerned to say so early on and get the project back on track.

Example box – Dropping Mentors from the programme
In the past the IPF programme has dropped mentors for not performing their contractual duties, but as the manager reported, this needs to happen early in the fellowship cycle.

- ***Managers should take the lead in trying to manage conflicting messages from advisors to fellows.***

As discussed above there can be many sources of advice for a fellow from mentors, programme mangers, trainers and resources people. As such, situations commonly occur in which the fellow receives conflicting advice from various people. It is not uncommon for the fellow at this stage to come to the manager especially when he/she has got advice from the mentor that he/she does not agree with. It was suggested that the programme manager should initially try to facilitate a clarification of the situation from the parties involved, but basically stress to the fellow that in the end their name will go on the paper and ultimately it is their own responsibility to decide the correct approach.

3.0 THE NEXT STEPS

Drawing from all of the insight developed through this process of practical exchange of experience, it is evident that clear action needs to be taken as a follow-up and plans made about the continuation of this important conversation.

- ***Develop a corpus of programme documents to share with all programmes.***

One of the clearest outcomes of this meeting is the need for managers to actively communicate all aspects of the programme. One of the foundations of good communication is the development of effective documents. In the spirit of not wishing to reinvent the wheel and share institutional learning across the OSI network, it would be useful for us to put together and actively distribute a corpus of programming documents, e.g. calls for application, programme descriptions, ToRs for mentors and fellows, descriptions of policy papers. The best place to host this corpus would be the new IPF wiki space (wiki.policy.hu) where everyone would be able to see and edit all the documents in a shared space. This also means that all updates of the documents are automatically stored as they are edited.

- ***Develop an OSI naming convention for the different types of policy papers.***

One of the biggest sources of confusion for policy fellowship programmes and other OSI programmes is the naming of the different types of policy papers e.g. policy study, policy brief, issue paper. It was suggested that it would be extremely useful for programmes to agree on a naming convention for these types of papers, so that from LGI to the Policy Documentation Centre (of the Center for Policy Studies) to IPF to the National Foundations we could all be speaking the same language.

- ***Continue to develop this conversation and share information on the management and development of OSI and affiliated fellowship programmes.***

As can be clearly seen from the initial brainstorm of topics that could have been covered in this meeting (Appendix B), we basically only began this important conversation in this meeting. For example, we didn't get to really discuss the subject of approaches to capacity development and training in fellowship programmes. Regular opportunities for this group to meet should be planned and sharing of information encouraged at all levels. For example, site visits could be organised for less experienced managers to spend time getting to know a more established programme.

- ***Draw on the insight from policy fellowship programmes outside the OSI network and its direct affiliates.***

It would be useful to broaden the base of experience that we are drawing from in further developing smart practice in this area by including the experience and lessons learned by those involved in policy fellowship programmes outside the OSI network and its affiliates. The overview matrix (Appendix C) of the participating fellowship programmes would be a framework within which to map the approaches taken by other programmes in the region and beyond. We have already begun a discussion with our co-trainer in many OSI policy fellowship programmes Leslie Pal, (Professor of public policy, Carleton University, Canada) on the possibility of developing the matrix.

Finally, we hope that this report can significantly contribute to the development of policy research fellowship programmes, which are an essential ingredient in the nascent evidence-based, decision-making cultures in transition contexts.

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APPENDIX A: LIST OF FELLOWSHIP MEETING PARTICIPANTS (MARCH 31ST, 2006)

No.	*Name*	*Title, Programme, Institution*
1	Pamela Kilpadi	Programme Manager, International Policy Fellowship, OSI
2	Kriszta Bakos	Programme Co-ordinator, International Policy Fellowship, OSI
3	Scott Abrams	Project Manager, Local Government and Public Service Reform Initiative, OSI
4	Dobrila Govedarica	Executive Director, Open Society Fund, BiH;
5	Erdenjargal	Executive Director, Open Society Forum, Mongolia;
6	Gerelmaa	Fellowship manager, Open Society Forum, Mongolia;
7	Viola Zentai	Director, Centre for Policy Studies, CEU
8	Katalin Koncz	Executive Director, OSI-Budapest
9	Andrew Cartwright	Researcher, Centre for Policy Studies, CEU (Mentor in IPF and Mongolian fellowship programmes);
10	Olga Shumylo	Co-ordinator of new Russian-speaking fellowship, International Centre for Policy Studies, Ukraine.
11	Justyna Frelak	Institute of Public Affairs, Poland (IPA Co-ordinator of NED-funded Russian fellowship with STRATEGIA)
12	Liliana Proskuryakova	IPF fellow and PASOS member at STRATEGIA, Russia (Strategia Co-ordinator of NED-funded Russian fellowship with IPA) + Current IPF fellow
13	Kinga Rethy	Roma Initiatives Office, OSI Budapest
14	Masa Djordjevic	LGI Project Manager & former LGI fellow
15	Veronika Bilski	CEE Trust representative
16	Oxana Gutu	LGI 05 fellow, Moldova
17	Lucian Ion Ciolan	Current IPF and former LGI fellow, Romania
18	Goran Buldioski	Think tank Fund, OSI-Budapest

Meeting Facilitators

1	Lisa Quinn	Training Associate, Local Government and Public Service Reform Initiative & International Policy Fellowship
2	Eóin Young	Training Associate, Local Government and Public Service Reform Initiative & International Policy Fellowship

APPENDIX B: DETAILED CONTENT AGENDA FOR OSI FELLOWSHIP MEETING

OSI FELLOWSHIP MEETING

March 31, 2006

Open Society Institute - Budapest

Oktober 6. u 12, Room 401, Meeting Room

POTENTIAL ISSUES FOR DISCUSSION UNDER THE CHOSEN PRIORITY AREAS

1. Selecting the right fellow

The selection process:

- the text of the announcement
- diversify/improve channels of advertisement of the programme in countries concerned;
- pre-selection process
- selecting the short listed candidates
- Verification of information provided in the application (credentials)
- the selection could include interviews of short-listed candidates to secure high quality candidates.
- better to establish more strict criteria for accession to fellowship under each topic? (i.e. working for a policy-related organization if the field of the topic)

Selection Criteria:

- scholars vs. NGO representatives?
- selection of candidates with leadership potential

2. Selecting suitable policy issues to research in the fellowship programme

Criteria for topic selection:

- rooted more or less in-depth ?
- timing - the process is long ?!
- one of challenges is how to anticipate policy issues. Potential sources: e.g. European Commission Green Papers; European Thing Tanks research agenda.
- “cross-country” issues: e.g. one topic common for 2-3 countries by 2-3 fellows, to enhance cross-country exchange of ideas and experience, cross-country teams.
- selection of priority topics that are key for region's (country's) development
- Matching the applicant's research and advocacy potential with his/her topic
- policy research results useful in fellows countries
- general versus regional-specific topics
- focus of the topics (broad versus narrower topics)

Geographical focus:

- if the program covers too many countries (in my case it's 12 FSU countries), how do we ensure the balance between the coverage and good proposals?
- if the program covers too many countries with rather divergent background, how do you ensure that the policy issue applies to all applicant countries?

Building on pre-existing capacity/research:
- policy oriented research via academic research

3. Deliverables/products of the fellowship

Ensuring quality & relevance of findings/outcomes
- policy research results useful in fellows countries
- quality of products
- continue to emphasize advocacy – post-fellowship stage
- Tailoring the outcomes for the regional/country's development priorities
- Assuring good quality and practical application of the outcomes
- What to do with selected fellows who do not deliver at the expected standard?
- how to ensure that people will be able to develop their interesting ideas into solid proposals and then will be able to deliver a good product? [We got into the situation that some fellows had very interesting ideas but their proposals were too vague or under-developed. May be LGI should provide people with some kind of manual on how to write proposals, i.e. develop ideas]
- how to ensure that the fellows deliver good products? (recommendations for both project coordinator and mentor)
- how to ensure that ALL fellows deliver good products?
- ensuring that fellows design for and conduct in-depth empirical research and base their findings on the results of that research.

Building on pre-existing capacity/research:
- policy oriented research via academic research

Access & visibility of products
- Visibility of the good research reports produced by fellows (access, distribution); accessibility in other languages than English for selected reports

Types of products produced
- the idea of having a real group product for burning issues in policy field (not a combination of case-studies

4. Selecting & working with mentors

Criteria for mentor selection
- mentors not only with academic background
- identify and engage reputable people: raises standards, enhances product and fellow‘s credibility,
- knowledge of the topic and knowledge of the topic specificity in the region of the fellows

- engaging mentors with already established connections to the policy field useful for advocacy/dissemination.

Setting/negotiating expectations for mentors

- training for mentors on how to work with a fellow
- Selecting the mode and frequency of communication with the mentor
- Getting together the group and group dynamics
- meeting of the fellows and mentor during the fellowship
- capacity and availability for real support (ongoing)
- participation in the realization of the final product(s)

5. Capacity development & training within the fellowship

Types of training for fellows

- training on policy paper writing
- train the trainer in policy process and advocacy.
- Aside from two-day training on 'effective policy writing' and two-day training on 'advocacy campaigns', should we have more capacity building support to fellows?
- It appeared that many people do not know how to develop proposals. For details see question 1.

Addressing the specific needs of fellows through training (What and when?)

- needs assessment
- Tailoring training for region/country specific context
- Advocacy training may be enriched with more help in designing and implementing an advocacy strategy/plan, preferably at an earlier stage of the fellowship, e.g. mid term meeting.
- customized versus uniform trainings
- training on demand versus "already chosen" trainings

Capacity of fellowship applicants

- There is a crucial need for building the capacity of experts before the fellowship. Otherwise we will have no fellows.

Availability of trainers/ training capacity

- do we have enough trainers?

OSI Fellowship Meeting

31 March, 2006 - Budapest

Overview of participating fellowship programmes

The following short overviews of participating fellowship programmes were provided by fellowship managers in response to the questions put.

Institutions:	**LGI / OSI**	**St.Petersburg "Strategy" Center / Institute of Public Affairs (Poland)**	**Open Society Institute; CEU Center for Policy Studies**	**International Centre for Policy Studies (ICPS, Ukraine)**	**OSF BiH**	**Open Society Forum, Mongolia**
What is the name of your fellowship programme?	LGI Policy Fellowship	Fellowship Program for Young Russian Policy and Opinion Makers	International Policy Fellowships	LGI Policy Fellowship for Russian-speaking experts	Policy Development Fellowship Program	Policy Fellowship Program
How many fellows did you have in the current fellowship cycle?	13	First edition: 5 persons Second edition: 6 persons (the selection procedure will start in April)	32 'outgoing'; 22 'incoming'	We are in the process of selecting our fellows. We should have 4-6 fellows this year	10	8 fellows in 2005-2006 cycle
How many research groups do you have in the current fellowship cycle?	2	n/a as first pilot project was completed in January 2006	8 'outgoing'; '6 incoming'	One	3	2 ICT fellows and 6 individual fellows; no established research groups
What topics are being researched in your current fellowship cycle?	- Financial management reform - Implementing Local Economic Development Strategies	- Labor migrations from Central and Eastern Europe and the CIS - New borders of Europe - Role of civil society in post communist transition: lessons from Poland - Educational reform in Poland - Decentralization and local government development - Strengthening civil liberties (role of free judiciary and media)	Combating the Resource Curse; Roma Exclusion; Promoting Open Muslim Societies; Combating Open Society Threats; Open Information Policy; The Challenge of Wider Europe	The broad topic is 'Public policy-making at the local level'. We expect our fellows to narrow it down.	1. Macroeconomic aspects of BiH accession to EU 2. Combating corruption 3. European values and BiH	**Governance area:** Citizen participation in decision making; Public Procurement **Economic policy area**: Mongolia's Integration into Northeast Asian market; LED **Social and Education Policy area**: Education opportunities for children with mental disabilities; Impact of Administrative Reform on quality/access to social services **ITC policy**: ICT policy; ICT & freedom of info

	LGI	Strategia/IPA	IPF	ICPS	OSF BiH	OSF Mng
What are the stated goals of your policy fellowship programme?	- To support creative and practical policy reform in individual countries and the region as a whole; - To enhance the capacities of talented fellows who are generally already well placed to influence policy; - To support the mission and day-to-day work of OSI and LGI. - To create networks of policy researchers/advocates	- To develop skills of participants affiliated with recognized civil organizations in policy research and analysis with the local impact - Support the development of think tanks and NGOs in Russia by strengthening existing networks - Promote contacts between Polish and Russian public policy think tanks and develop model for on-going cooperation	The IPF program “identifies and supports the research of open society leaders in countries throughout the Soros foundations network.”	The stated goal is to broaden the effects of the original LGI Fellowship program by involving Russian-speaking experts in order to support policy research in the former Soviet Union.	to improve BiH policy research and dialogue and to contribute to the development of a sound policy-making culture based on informative and empirically grounded policy options.	To develop capacity of Mongolian policy analysts and to further OSF’s advocacy goals with the help of good-quality analytical work and a network of affiliated policy researchers
How do you select the policy issues to be researched in your fellowship programme?	LGI strategically chooses topics that either buttress its ongoing work or allows it to explore new fields of heightened interest.	The thematic areas correspond with the IPA/Strategia interests in order to lead to the dissemination and transfer of Polish experience in the field of social and political transformations to neighboring country within the framework of a fellowship program.	The IPF Advisory Board, together with the OSI President and relevant program colleagues, defines the fellowship topics	The policy issues were chosen on the basis of the needs assessment for FSU region made by ICPS experts	close	All research issues and specific topics of policy fellowship projects are linked to the OSF’s activity areas and are carefully formulated to support policy dialogues that OSF is engaged in
What is the timeframe of your policy fellowship programme? What are the stated milestones/stages through your fellowship cycle?	12 months for the researching/drafting. An additional 12 months or so for publishing and/or follow-up activities/advocacy.	Timeframe: from July 2005 to December 2005 Milestones: - A three-day introductory training in St. Petersburg (July 4-6, 2005) - Finalizing the research project in Poland An 7-day study visit in Warsaw (September/October)	12 month research projects within a 15-month cycle to allow for visas & contract preparation, etc **25 March** - Revised Research Proposals based on Group Advisor comments **23-30 April** - Seminar, followed by submission of draft Issue Paper and Initial Work and Advocacy Plan to Group Advisor **20 May** - Website upload complete with CV, bio, revised research proposal, project timeline, Issue Paper, Initial Work	12 months. Stage 1: selection of fellows, development of detailed plans of their activities (with the help of project mentor), training on how to write effective policy papers Stage 2: preparation of first drafts of fellows’ policy papers Stage 3: discussion of their first drafts with mentor (comments);	14 months from call to completion of fellowship Call for applications Selection of participants (15 - 17) **Workshop on policy research (4 days)** Submission of draft Research proposals for fellowship to trainers Feedback from trainers Submission of Research proposals for fellowship	Average duration of the fellowship – 7-9 months. Major milestones: 1. proposal finalization 2. literature review and survey design 3. field data collection and processing 4. policy paper drafting and development of recommendations 5. solicitation of feedback on draft and its finalization

	LGI	Strategia/IPA	IPF	ICPS	OSF BiH	OSF Mng
		- Individual final composition – second stage (November) - Dissemination activities (December)	and Advocacy Plan **1 October** - Interim Activity Reports and 20-page Policy Study outlines submitted to Group Advisor and IPF staff **5 December** - Draft 20-page Policy Studies and revised Activity Report submitted to Group Advisor and IPF staff, financial year-end report submitted to IPF staff; revised Activity Report uploaded to website **15 February** - Group Advisor evaluations, final 20-page Policy Studies submitted to Group Advisor and IPF staff for publication with the CPS Policy Documentation Center (http://pdc.ceu.hu) **20 April** - Final Activity Reports uploaded to website and draft of final Research Paper submitted to Group Advisor and IPF staff **20 May -** Final Group Advisor evaluations; final Research Paper incorporating feedback uploaded to website	training on how to organize an effective advocacy campaign Stage 4: preparation of second drafts of fellows' policy papers Stage 5: presentation of policy papers and fellows' advocacy plans	to OSF BH Selection of fellows, notification (up to 10) Conduct research **Workshop on policy analysis and writing (3 days)** Complete research and analysis and draft policy study Get feedback on draft policy study from both MM and IM Complete policy study and produce draft policy brief Get feedback on draft policy brief from MM **Workshop on advocacy for policy change (2 days)** Complete fellowship with plan for advocacy, and final version of study and brief	6. public presentation of findings and recommendations
What are your selection criteria for fellows?	Good proposal from someone well positioned to influence policy in their respective country. We also look to avoid "professional grant seekers" and those who have been too closely affiliated with OSI programs in the past.	Candidates should: - have valuable research record in the chosen thematic area; - have a documented record of civic involvement and be well positioned within their communities; - submit a letter of recommendation from the affiliated organization describing his civic involvement and the mission of the organization - demonstrate English fluency in speaking and writing; good	- Applicants must be able to demonstrate excellent written and spoken English-language skills. - Applicants should be able to demonstrate that they can devote the majority of their working time to the project and that other commitments are both complementary to their project and occupy a minority of their time. - Independent, internationally recognized experts will evaluate proposals on the basis of their aims and objectives, research questions, project conceptualization,	Relevance of applicants' proposals to the topic of the fellowship, experience in the field, clear and coherent project idea, embededness of applicants' projects into their current activities, knowledge of Russian language.	Understanding the "function" of policy research Will to contribute to the society	1. quality and clarity of initial research proposal 2. general analytical/ academic experience 3. familiarity with the field of research proposed 4. commitment to work as a policy fellow (through personal application letter and opportunity to be released of other full-time commitments during the fellowship term)

	LGI	Strategia/IPA	IPF	ICPS	OSF BiH	OSF Mng
		knowledge of Polish would be an asset;	proposed methodology, contribution to OSI goals, clarity of expression, and qualifications of the applicant. - Proposals may be country specific or comparative but all should be feasible and justified. Evaluators are looking for innovative proposals that have potential significant impact.			
What are your selection criteria for mentors?	Someone LGI has successfully partnered with in the past or who comes to us by close association. Ideal candidates are recognized as influential leaders in their field (i.e. Michael Emerson)	The IPA assigns an individual tutor to each fellow, selected from among the circle of IPA associate experts or other academics or professionals who guide them in their work	Nomination by OSI President and/or Advisory Board members	Experience in the region, strong expertise in the sphere of public policy-making at the local level, knowledge of Russian language, experience in mentorship for other fellowship programs	excellence in the field	1. Previous academic and/or policy research experience in the area of research 2. Familiarity with the topic of research
What incentives do your provide to keep fellows on schedule?	A bit of a carrot and stick approach regarding the disbursement of stipends and the possibility to publish.	Stipend; helping to conduct research in the home region after finishing the fellowship. They work closely with mentor and policy advisor. It is intended to prepare a considerable part of work during the study visit in Poland	Multiple fellowship instalments based on evaluated performance in achieving detailed project objectives in advocacy plan and contract	Monthly stipend	payment is linked to duty fulfilled	1. Local and international mentors (whenever possible) to help progress the research 2. Workplace with access to Internet, printer and policy resource center to read or borrow books and publications 3. Full support of field study 4. Facilitation of experts group's meeting, consultation sessions and other meetings (when requested) 5. Progress reporting and discussion meetings among fellows 6. A series of three trainings

	LGI	Strategia/IPA	IPF	ICPS	OSF BiH	OSF Mng
What are fellows required to produce during the fellowship (e.g. policy papers, advocacy plans)?	Both.	Short policy papers in English	Issue Paper Work and Advocacy Plan Website and/or Web Board 20-page Policy Study Research Paper	Policy papers, advocacy plans and project proposals for further work in the selected area	policy paper, brief, advocacy plan	1.Policy paper 2. Policy options in the form of recommendations 3. Articles in periodicals or on the OSF's website
What type of capacity development & training do you provide to fellows within the fellowship?	Policy Paper Writing and Presentation Skills (now to be replaced with Advocacy training)	Training in policy research, analysis and writing. The workshop will allow the fellows to develop an overall conception of their research projects, based on the received materials, work in groups and the IPA and STRATEGIA staff presentation	Two- to three voluntary policy workshops (policy research methods, policy writing, policy advocacy, etc) Two- to three advocacy workshops organized by group advisors	Two training sessions: - On how to write an effective policy paper - on how to organize an effective advocacy campaign	3 workshops: 1. policy research 2. policy writing 3. advocacy	1. A series of 3 trainings on research methodology, policy paper writing, advocacy 2. Financial support for participation in international conferences/ study tours (when requested) 3. Individual order-based purchase of books and other publications for all fellows
Do you fund follow-up advocacy initiatives?	Yes.	Under consideration	Centralized funding is provided for advocacy and dissemination activities as well as publications organized by group advisors	We will encourage our fellows to develop project proposals, which will be submitted to LGI/OSI.	No (thinking of it)	Based on the case-by-case needs