



Global Fund External Review Report

Overview

The Global Fund was established in November 2010 to foster global citizenship through the pillars of International Engagement and Intercultural Understanding in the UBC Strategic Plan, *Place and Promise*. The Fund provides small grants (typically up to \$2,000) to currently enrolled UBC -Vancouver students to fund student-led initiatives, projects or events that focus on international engagement, intercultural understanding, sustainability and collaboration and have a connection with the Simon K.Y. Lee Global Lounge & Resource Centre. The Fund seeks to enrich student learning and engagement outside the classroom by encouraging student-led initiatives which will enhance our campus culture of global awareness, sensitivity and involvement. In 2012, the AMS signed a Memorandum of Understanding with UBC to provide an extra \$10 000 to the Global Fund for internationally-focused events taking place on campus.

Review Concept

Just over five years after the Fund was established and with 100 successful applicants to date, International Student Development supported an external review to examine operational and programmatic aspects of the Global Fund. The review would look to answer the following questions:

- To what extent can we improve the operational processes for future funding cycles?
- To what extent does the Global Fund build student capacity?
- To what extent is the Fund being used by a variety of students from across organizations and disciplines?
- To what extent does the Global Fund support international engagement and intercultural awareness on campus?

Methods

- Establish an external review committee (ERC) to oversee the review process. Members included:
 - Jenny Peterson (UBC Faculty Member, Political Science)
 - Barbara McMillan (independent consultant with expertise in program planning and management, training design and development, as well as grant assessment)
 - Me Ling Chu (International Student Coordinator & Advisor in the UBC Faculty of Engineering)
 - Mehryar Maalem (third year student in the Bachelor of International Economics Program).
- Interview and survey Review Committee members
- Interview staff involved with the program (Program Advisor, Global Fund Chair, Associate Director, Finance, Finance Clerk)



- Survey and interview Global Fund applicants (both recipients and non-recipients)

Results and Recommendations

1. To what extent can we improve the operational processes for future funding cycles?

Financial Process

Overall, the Fund has an efficient operational process; however, a common challenge that staff members mentioned was under the umbrella of financial processes with student receipts often being handed in late or incomplete. 90% of applicants surveyed stated that they understood that the receipts had to be provided one month after project completion, but stressed difficulty in dealing with receipts for both the AMS and the Global Fund: *“Being an AMS club, all transactions to organizations/companies are made through the AMS club account, meaning any contracts to that regard are handled and signed by the AMS. The club is therefore provided with Invoices (not receipts) which are then presented to the AMS offices to complete the necessary payment. What this process means is that the time taken to complete transactions is longer and the company being paid will then have to mail the receipts. These receipts however do not always get mailed and in that case one only has stamped invoice directed to the AMS and not receipts”*. As well, because many club members are often involved in the Global Fund process, the Final Report is often not completed in time: *“I had assigned the project treasurer to do the report writing, and I forgot to follow-up to confirm his commitment to doing the assignment”*.

The ERC believes that better educational resources, such as videos, sample reports, or different fund distribution schemes would help improve the operational processes. For instance, a system could be created where part of the funding is given upon approval and after the initial funding has been depleted and accounted for, the rest can be deposited into student bank accounts. Such processes could save significant time for staff members in reconciling funding. As well, the additional educational resources can provide students the tools to submit complete reports and having a multi-step funding process can catch potential errors and encourage student accountability. In addition, the increased educational resources can reach a wider audience without compromising the time of the Global Lounge staff members.



Application Process

Overall, Global Fund applicants stated that they were satisfied with the application process. The vast majority found the application guidelines useful and the application itself easy to use.

Student Understanding of Requirements					
Variable	Strongly Agree	Agree	Not Applicable	Disagree	Strongly Disagree
Application was easy to use	44%	52%	4%	0%	0%
Application guidelines were easy to understand	50%	44%	5%	1%	0%
Application guidelines were useful	48%	46%	4%	2%	0%
Global Lounge staff answered questions quickly	67%	22%	10%	1%	0%
Global Lounge provided help with the application	71%	24%	5%	0%	0%

When asked how the Global Lounge staff could help students feel more supported during the application process, the majority of comments reflected that applicants felt quite supported: *“I don't remember feeling like I needed more support in the process; Global Lounge employees were readily available to answer any questions I had and guide me through the process of applying for the fund”*.

For students who did not receive funding the first time around, the majority expressed appreciation for the follow-up meetings and feedback: *“I honestly felt very supported! When I applied the first time and was not accepted, I was given constructive feedback and the offer to chat further if I had any questions about applying the next time. From that I understood more on what the fund was used for and was able to tailor my projects and application to suit the guidelines, which of course led to a more collaborative and successful project as well”*.

One area of improvement mentioned by survey participants was the time frame in which staff took to respond to questions surrounding the applications: *“I would just hope that they [staff] could respond in a more timely fashion to questions or concerns that we have, as usually I have to reach out a couple times in order for my questions to be answered”*.



Other suggestions to improve the process included:

- **Office Hours:** *“Offer set office hours so some students are not intimidated when making an appointment”*
- **Video:** *“Make a video of past winners and what they've done to showcase what the has been awarded funding”*
- **Workshop:** *“I would prefer if the GL staff could walk interested applicants through a successful grant application (perhaps through the format of a workshop?) - what a sufficiently detailed budget looks like, what supporting information should be included, tips for strategies that help measure impact, etc.”*
- **Budget template/example:** 61% of survey participants stated that creating a budget was the most difficult part of the application. Suggestions for improving the process included offering a template or an example on the Global Lounge website. *“It's a bit difficult to estimate costs prior to planning an event. It might be helpful for staff to offer some sample budgets from previous events (for instance, Destination South Asia's budget could be helpful for other groups planning conferences).”*

Review Processes

When asked about the Global Fund review process, the majority of applicants agreed or strongly agreed that the process was transparent, easy to understand and timely.

Student Satisfaction of the Review Process					
Variable	Strongly Agree	Agree	Not Applicable	Disagree	Strongly Disagree
The review process was transparent	15 39.5%	19 50.0%	4 10.5%	1 2.6%	0 0.0%
The review process was easy to understand	15 39.5%	20 52.6%	3 7.9%	1 2.6%	0 0.0%
Global Lounge staff answered any question I had during the review process	19 51.4%	13 35.1%	5 13.5%	0 0%	0 0.0%
I found the results of the review in a timely manner	12 32.4%	20 54.1%	3 8.1%	2 5.4%	0 0.0%
I understood how decisions for funding were made	15 39.5%	15 39.5%	6 15.8%	3 7.9%	0 0.0%



As well, 76% of survey participants who did not receive funding their first time applying, but did reapply, stated that the feedback from the Review Committee and Global Lounge staff helped them improve their future applications for funding.

Potential Action Points:

- Create more student resources to support the financial report, for example: sample reports or video explaining how to deal with receipts.
- Provide students with partial funding upfront and provide the rest after the other funds have been depleted.
- Provide past examples of successful applications through video, workshop or template formats.
- Provide budget templates on the website
- Work with the AMS more directly in order to have a more streamlined receipting process.

Global Fund Committee Processes

Committee Orientation: Overall, the ERC felt that having an orientation for all new Review Committee members was very useful. The ‘mock’ grading element was highlighted as essential to the group’s future work as it gave them clear benchmarks for what a ‘good event’ or ‘good proposal’ looked like. Participants left with a clear sense of what the process would be moving forward and the goals/aims of the fund. They also believed the length of the training was sufficient. Their one concern seemed to be on the environmental impact of the event, with a suggestion that there was no need to have so many printed documents.

Review Forms and Survey Tool: In order to rank the Global Fund applications, the Review Committee members used a rubric on UBC Surveys. Again, there was consensus that this element of the process was clear and effective and enabled an informed and fair allotment of funding. The survey was found to closely mirror the application form, making the process clear and straightforward. The ability to write out detailed feedback and suggestions to applicants was appreciated. Even though the bulk of applications often come at times in the semester when these Committee members are most busy, there were no concerns about the impact on their own schedules, suggesting that the monthly deadlines continue to be a viable option.

It was noted that there were some technical difficulties while using the online survey tool, specifically in that it was not possible (or if it were possible, it was not clear how) to save their work/progress. Considering it would sometimes take one to two hours to complete the survey, this was a point of stress/concern for the Global Fund Committee participants. It was noted by one interviewee that the



results of the completed survey were printed out for them for the committee meetings that followed, but not supplied in advance, which could have been helpful.

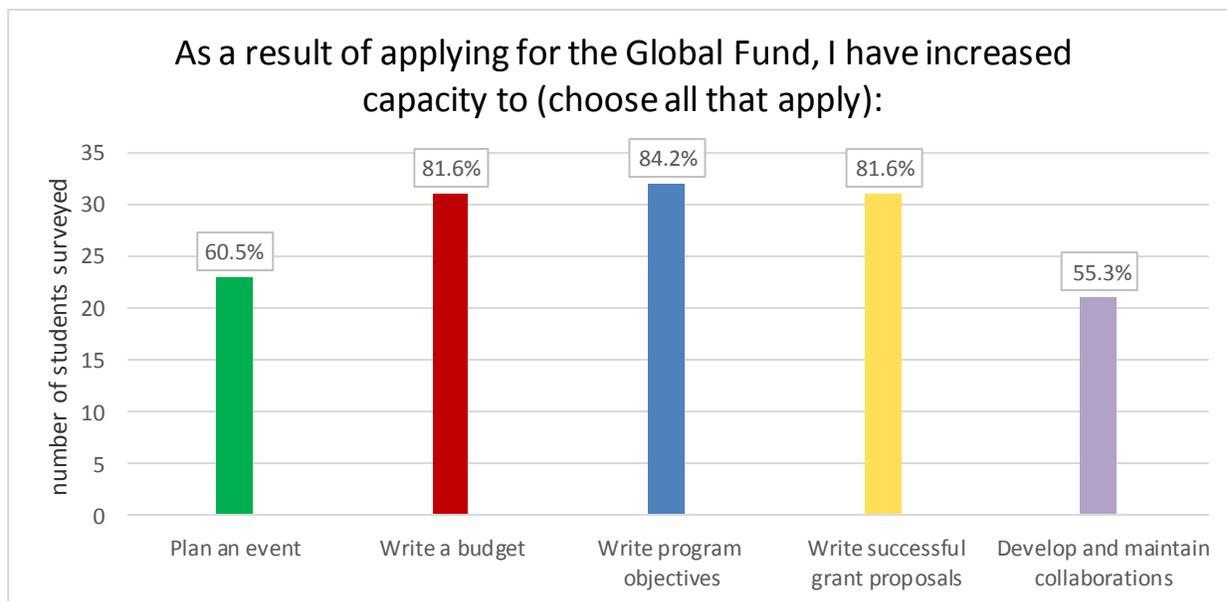
Review Committee Meetings: Interviewees appreciated completing the surveys prior to committee meetings which led to a more efficient meeting structure, focused on reflection and further discussion on required applications. Committee members also noted their appreciation for the roundtable discussion format of the committee meetings as well as the opportunity to provide feedback if meetings had to be missed. 100% of committee members surveyed said they would participate as a review panel member again, or recommend someone they knew to participate: *“Having participated in the review panel, I can also say that I have a sharper image of student leadership on campus and feel more connected with the international community at UBC”.*

Potential Action Points:

- Reduce hard copies of materials and provide soft copies when possible (during orientation and monthly review meetings).
- Implement evaluation process immediately following the orientation.
- Create a process to save rubric information. If there is already an option to save their work along the way, ensure the tool that allows them to do this is made more obvious or that the reviewers are explicitly shown how to do this during orientation.
- Circulate survey results to the review team ahead of the committee meetings so as to flag any potential disagreements before coming to the meetings (however, this was not something seen as particularly problematic by the interviewees as they found little variation in opinions and could think of no examples of serious disagreement).

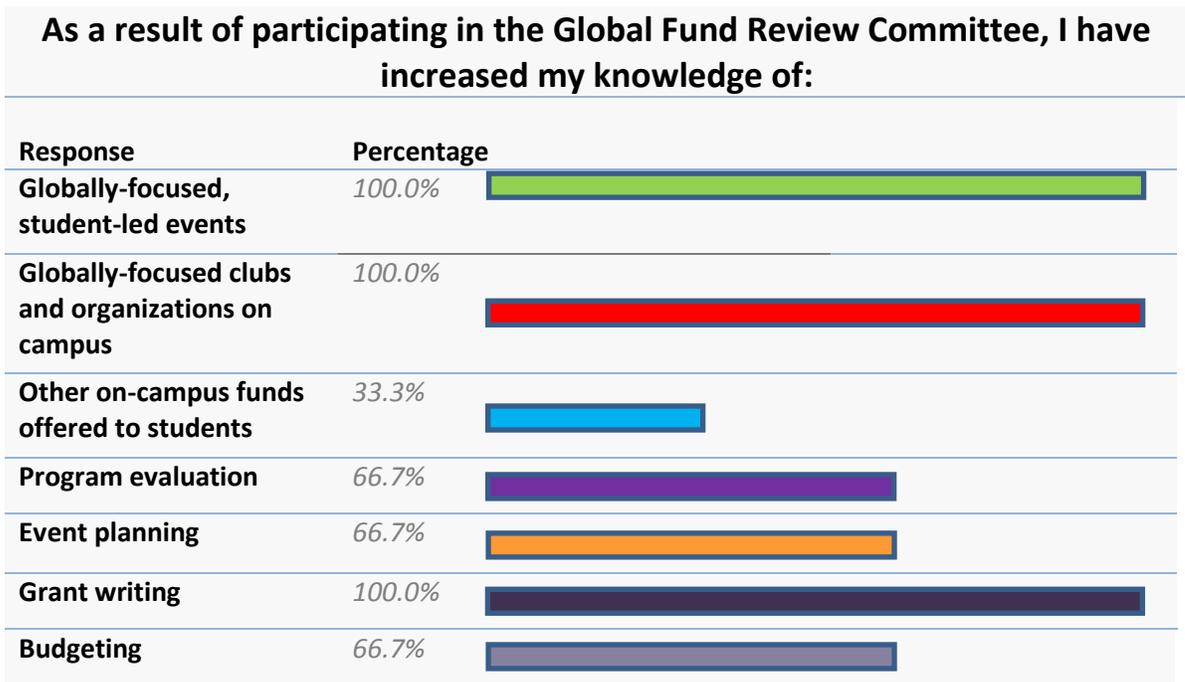
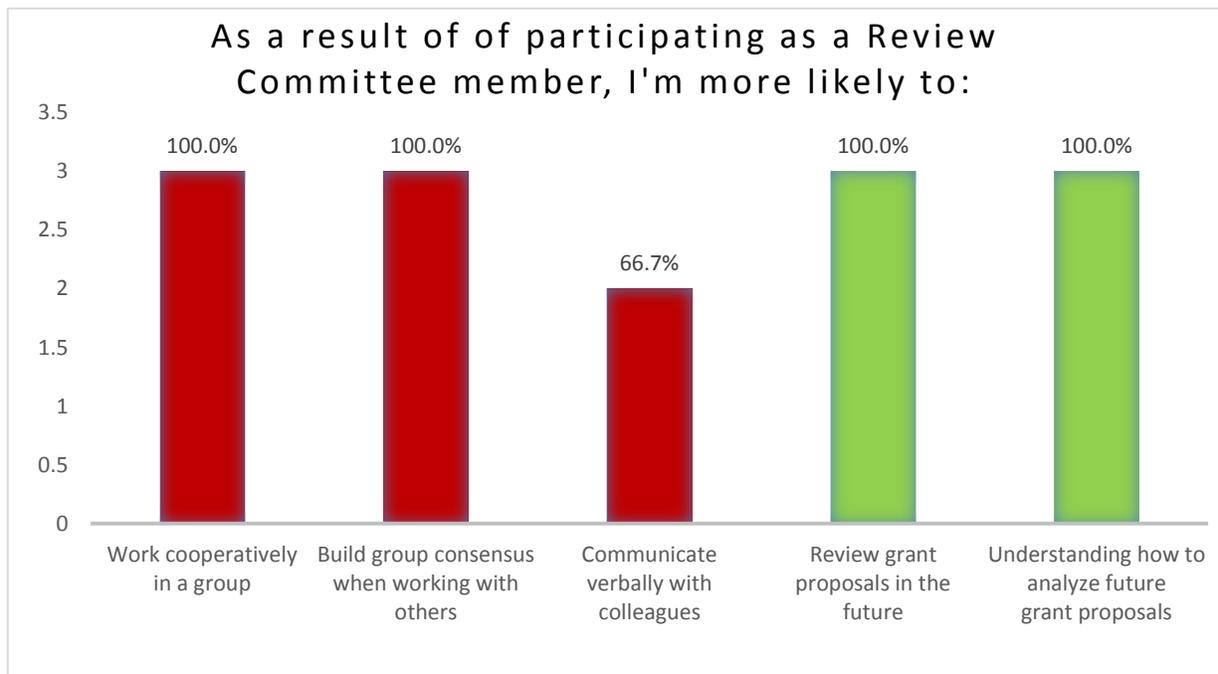
2. To what extent does the Global Fund build student capacity?

The ERC feels strongly that upon writing a successful Global Fund application, the students will acquire skills in financial reporting, fund management, and a better understanding of international engagement and intercultural awareness on campus. Over 80% of applicants stated that they increased their capacity in writing successful grant proposals, creating a budget and writing program objectives. As well, 84% of survey participants felt that the process of applying for the Global Fund helped them apply for future grants.



For students who sit on the Review Committee for the Global Fund, the opportunity also provided them with a greater understanding of student- leadership and event-planning experience:

- *“I’ve gained a tremendous amount of insight which I am confident will serve me well throughout the organization of future events”.*
- *“Having participated in the review panel, I can also say that I have a sharper image of student leadership on campus and feel more connected with the international community at UBC”*





From all the data received, the ERC believes that the Global Fund builds student capacity by:

- opening up space for collaboration that doesn't exist elsewhere
- providing networking opportunities for students to connect to groups/students that they wouldn't normally engage with.
- providing a source of funding for small developing clubs, especially given the difficulty of accessing other funds on campus

3. To what extent is the Fund being used by a variety of students from across organizations and disciplines?

Global Lounge Membership: Since 2012, the majority of applicants and recipients of the Global Fund have been from the Global Lounge membership. However, this past fiscal year (2015/16), this number changed with 61% of all recipients being non-Global Lounge Network Members. From the Global Lounge staff perspective, this is a result of increased marketing of the Global Fund at different events and more word of mouth promotion.

Global Fund Recipients	FY 2015-2016		FY 2014-2015		FY 2013-14		FY 2012-13	
	Recipients		Recipients		Recipients		Recipients	
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage
Global Lounge Network Members	7	38.89%	12	57.14%	9	56.25%	12	70.59%
Non-Network Members	11	61.11%	9	42.86%	7	43.75%	5	29.41%
Total	18		21		16		17	

Nevertheless, in order to maintain a variety of applicants from across the university, we recommend first identifying possible underrepresented groups and then following with a more targeted marketing strategy to increase awareness of the Fund to encourage a more diverse applicant pool. We believe that



more diverse applicants can result in a wider variety of projects that can further improve the goals of the Global Fund.

We also recommend making it clearer in the application that applicants do not have to be Global Lounge Members in order to apply to the Fund.

Last, while we understand that the Global Lounge section in the application form is important to the programming of the space, interviewees expressed that the 'Global Lounge Involvement' criteria could be a slightly problematic for clubs to meaningfully explain. As well, interviewees stated that they were looking for a "stock answer", something to just fill out in order to get the funding. As a result, the ERC believes that this section might:

- hold non-members (especially newer clubs) back from applying to the Fund
- stop otherwise good proposals from being rated more highly

Operational Costs: Committee members interviewed noted that the Fund cannot be used to cover operational costs of clubs and organizations. They felt that this was perhaps limiting the impact of the fund as they have come across very good proposals (that they felt would have a strong impact) that were seeking operational funds. The Committee felt that covering some of these costs would allow clubs to grow stronger and more effective, which in turn, would allow them to have a greater impact in the future.

Potential Action Points:

- Discuss and reconsider the Global Lounge Involvement criteria. Are there other (more effective) ways of strengthening the Global Lounge through this funding mechanism other than having it as an application criteria?
- Consider if there is a need to try and encourage a broader range of applicants
- Provide more information/be more transparent on the issue of not needing to be a Global Lounge member to apply to the fund.
- Provide more information to clubs about how much money is left in the fund at any given point in time.
- Discuss and reconsider the reasons for not allowing the funding of operational costs, perhaps taking into account the ways in which covering operational costs might support club development and lead to impact in the future



4. To what extent does the Global Fund support international engagement and intercultural awareness on campus?

The External Review Committee believes that the Global Fund has been an important resource and effective in supporting international engagement and intercultural awareness on campus. Applicants felt that it gave internationally-focused clubs an opportunity to make their ideas a reality:

- *“The Global Fund is such a fantastic resource for improving the community at UBC. Clubs or individuals focused on international awareness and humanitarian efforts can find it so difficult to discover resources that will take a chance on them, and provide them the monetary support necessary to make their ideas a reality. I am happy to have been a part of something that is dedicated to doing just that”.*
- *“Often times I think students that are truly invested in these causes have many great ideas, but they lack the experience to execute these ideas (due to lack of life experience, for example). Funding aside, I think the process of applying to Global Fund helps applicants think critically about their ideas and come up with feasible, realistic plans”.*

The Global Fund was also seen as an opportunity for collaboration amongst not only domestic and international students, but also amongst students from different disciplines to connect on key global issues:

- *“Without a doubt, the global fund allows for increased international engagement. It allows students from different educational and cultural backgrounds to come together and discuss key global issues from vastly different perspectives. In the case of our Universities for Allied and Essential Medicines conference, we obtained input from local and international students and speakers about issues such as HIV treatment and prevention both in BC and abroad”.*
- *“[The Global Fund]...encouraged collaboration with other campus groups. Collaboration encouraged us to think outside the box, leading to endeavors that more thoughtfully incorporated a variety of intercultural perspectives, on a breadth of international issues...the existence of the fund led us to collaborate with five other student groups to create a more comprehensive series of events encompassing political, advocacy and human rights perspectives”.*
“The Global Fund... allows a local BC resident to listen to and engage with a Kenyan international student. It also exposes medical students to those in public health or pharmacy, thereby viewing a global issue with a slightly different lens. This results in a lower threshold for



students from all ethnic, educational and institutional backgrounds to engage with each other and to be more open from learning from one another”.

Lastly, the Global Fund is an opportunity for students to gain wider support from UBC staff and their peers:

- *“[the Global Fund] provides a showcase for those interested in applying their university degrees to a global scale, and the Global Lounge is a safe area to network, receive feedback, and connect with ideas about which students are passionate”.*
- *“The Global Fund empowers student groups to be more ambitious about what they seek to achieve and to go much further with their projects. UBC students are innately interested in engaging with issues and cultures around the world. The global fund is an indispensable component of an ecosystem that has been drawing in like-minded students to work together on challenges both within the UBC community and beyond”.*

In conclusion, the ERC believes that the Global Fund is a significant resource that effectively supports international engagement and intercultural awareness on the UBC campus. With some modifications as suggested above, the Global Fund can be even more successful in the future.