CHAPTER 600 - U.S. LECTURERS AND RESEARCH SCHOLARS

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CHAPTER 600 - U.S. LECTURERS AND RESEARCH SCHOLARS

610 GENERAL PROVISIONS

611 Definition and Classification

611.1 Lecturers

Lecturers are experienced educators (normally at the Ph.D. or equivalent level) or experienced professionals with substantial professional, scholarly, or artistic accomplishments who will engage in full-time lecturing (teaching or consultation) at the college or university level abroad.

611.2 Researchers

Researchers are individuals at the Ph.D. or equivalent level, including independent scholars who have made recognized contributions to scholarly research in their fields, who will conduct full-time advanced research abroad at or in cooperation with an approved institution of higher education or research facility under a clearly-defined project.

611.3 Lecturer/researchers

Lecturer/researchers are those who meet the qualifications stated in Sections 611.1 and 611.2 and who will engage in a combination of lecturing and advanced research abroad.

611.4 Distinguished Senior Scholars

Distinguished Senior Scholars are eminent American scholars and professionals specially recruited for a Distinguished Scholar Award. These awards, which ordinarily pay higher stipends than other grants, may be long-term (a semester or academic year) or short-term (two weeks to two months).

The purpose of the Distinguished Scholar Award is to enhance the prestige of the Fulbright Program by encouraging eminent scholars to participate, as well as to provide Commissions and posts the flexibility to support special projects that may increase the visibility of the Fulbright Program.

Distinguished Senior Scholars may perform the following functions abroad:

1. present lectures on a regular or occasional basis, or consult with officials at institutions of higher learning;

2. participate in seminars or workshops;

3. conduct surveys; or

4. take part in other academic or cultural programs sponsored by educational institutions, agencies, or otherwise under the direction of Commissions or posts.

611.5 Seminar Participants

Seminar participants are persons who attend a special seminar as part of a group.

611.6 Senior Specialists

Senior Specialists are experienced educators (normally at the Ph.D or equivalent level) or experienced professionals with substantial professional, scholarly, or artistic accomplishments who will engage in one or more of the following activities at the college or university level abroad for a period of no less than two weeks and no more than six weeks:

- Conduct needs assessments and surveys;
- Take part in specialized academic programs and conferences;
- Consult with administrators and instructors on faculty development;
- Present lectures at graduate and undergraduate levels;
- Participate in or lead seminars or workshops;
- Develop and/or assess academic curricula or educational materials;

- Conduct faculty-training programs.

The purpose of the Senior Specialists Program is to increase the number of leading U.S. scholars in academic exchanges, to encourage those who have not done so to apply for a longer-term Fulbright exchange opportunity, to respond to program needs expressed by Fulbright Commissions and Embassy Public Affairs Sections, to encourage new activities that go beyond the traditional Fulbright activities of lecturing and research, and to promote increased connections and linkages between U.S. and overseas academic institutions.

Following peer review, Senior Specialist applicants are recommended to and selected by the Board to be placed on a roster. The Bureau reviews the post or Commission request and ensures that the project meets the Senior Specialists Program parameters and that the match of Specialist and project is appropriate.

611.7 Collaborative Group Research Program

Collaborative group research program grantees are outstanding U.S. professionals and scholars with substantial expertise and professional standing in the area of a designated topic of global significance. They conduct multi-disciplinary research, individually and as members of a collaborative research program group dealing with the designated topic. They are selected by the Board.

Topics of global significance are recommended by the Bureau and approved by the Board. Collaborative group research program grantees' grant activities usually include a preliminary, mid-term, and final plenary seminar meeting and a two- to three-month academic research visit abroad.

The program is carried out under the direction of a collaborative group research program Distinguished Leader who is proposed by the cooperating agency and selected by the Bureau for interdisciplinary expertise and professional standing in the area of the research topic; the leader assists in the review of applications and considers them with regard to the sub groups that will examine themes for the research topic. The leader is not a Fulbright grantee.

The purpose of the collaborative group research program is:

• To bring new depth and public visibility to the traditional Fulbright Senior Scholar Program;

• To look beyond the traditional role of the Fulbright Program and to foster the exchange of individual scholars by supporting international, interdisciplinary, collaborative research that examines topics of significance to mankind;

• To build networks of scholars for ongoing collaboration.

620 SELECTION CRITERIA

621 Personal Factors

621.1 Citizenship

Candidates must be citizens or nationals of the United States of America. In some cases it may not be feasible for a dual national to participate in a Fulbright program in the country of his or her other nationality due to host country law or policy. Therefore it is incumbent upon candidates to ascertain whether they have, or are eligible to have, their host countries' nationality and address any potential consequences thereof before they accept an award.

621.2 Nondiscrimination

Candidates will be considered without regard to race, color, religion, sex, national origin, age, disability, political affiliation, marital status, status as a parent, protected genetic information, or sexual orientation.

621.3 Adaptability

Candidates should demonstrate the dynamism and flexibility necessary for active involvement in the host culture.

The cooperating agency is authorized to assess whether the candidate shows promise of being able to adjust successfully to life in the host country.

621.4 Availability

The candidate is solely responsible for obtaining any necessary leave of absence and for making any required arrangement in order to be able to accept a grant. The award of a grant does not constitute endorsement on the part of the Fulbright Foreign Scholarship Board, the U.S. Department of State, or the cooperating agency of a leave of absence for the grantee in the absence of assent by the grantee's educational institution or employer.

621.5 Veterans

Candidates who have served in the Armed Forces of the United States will be given preference, provided their qualifications are approximately equivalent to those of other candidates.

622 Academic and Program Factors

622.1 Professional Excellence

A candidate must demonstrate academic, professional or artistic excellence, as evidenced by professional standing, competence in teaching, and other achievements.

622.2 Nature of Projects

A candidate's proposed project should reflect enduring concerns, emphasize basic subjects, demonstrate sound methodology, and avoid politicization of scholarly inquiry.

622.3 Educational Background

Provided that the candidate's qualifications are approximately equivalent to those of other candidates, preference will be given to the candidate whose higher education was received primarily at U.S. colleges and universities.

622.4 Host Country Considerations

a. Candidates must be acceptable to the country in which they propose to pursue their projects. Consideration will be given to any likely sensitivity in the host country to the candidate's proposed project.

b. In selecting grantees, the ability of candidates to make a significant contribution to the program objectives in the host country is also a consideration. Preference will be given to candidates with the qualifications to meet the needs of higher education in the host country.

c. Candidates must meet the general language requirements considered necessary for the project and for adjustment to life in the host county.

622.5 Benefit to the United States

A factor in the selection of grantees is the expected multiplier effect of the grantee's overseas experience. In this context, consideration will be given to the value of the candidate's proposed project in terms of (1) benefit to the candidate's students and home institution in the United States, (2) the advancement of knowledge in the candidate's field of study, and (3) the expectation that the experience will result in publications, outreach programs and other activities in the United States.

622.6 Lecturers as Consultants

The Board believes that the purposes of the Fulbright Program are best achieved when lecturers and researchers engage in conventional academic endeavors, normally teaching or research. Although (as provided in Section 611.1) lecturers may be recruited to engage exclusively in consulting, such programs must be submitted to the Board for approval prior to announcement or recruitment.

623 Placement Factors

623.1 Affiliation

Most grantees will be affiliated at educational institutions abroad; however, the Board recognizes that some projects can best be carried out without an academic affiliation and it may approve other appropriate placements upon recommendation of the Commission or post.

623.2 Criteria for Placement in U.S. Citizen-Sponsored Schools Abroad

U.S. lecturers may be affiliated with a U.S. citizen-sponsored school abroad if its student body consists primarily of nationals of the host country.

For researchers, affiliation with a U.S. citizen-sponsored school abroad is permitted so long as the research opportunities allow the scholar to do research in non-U.S. subjects.

(For a full statement of the Board's policy on this subject, see Section 212.5-3.)

623.3 Change of Placement

The grantee should not change the institutional placement arranged by the Commission or post without the approval of the Commission or post.

624 Experience Abroad Factors

624.1 Previous Experience Abroad

a. Preference will be given to qualified candidates who have not had substantial recent experience abroad, especially in the country to which they are applying. The Board defines substantial recent experience as study, teaching, research or employment for a period aggregating more than an academic year (nine months) during the past five years.

b. The demands of the field may require that this preference be set aside. Examples include difficulty of living and working conditions, required language fluency, the nature of the particular field research, and assignments for which recent relevant professional experience abroad may be an asset. Recommendation of candidates with substantial recent experience in the country to which they are applying should be made only in rare and compelling circumstances, accompanied by written justification documenting the demands of the field. Approval is at the discretion of the Board.

c. The preference for candidates without substantial recent experience in the country to which they are applying applies at each stage of competition.

d. Duty abroad in the Armed Forces of the United States is not considered experience abroad within the meaning of this section.

e. A candidate who has resided abroad for five or more consecutive years in the six-year period preceding the date of application is ineligible for a grant. For the purpose of this section, a candidate who has lived outside the United States for nine months or more during a calendar year is deemed to have resided abroad for that year.

624.2 Previous Fulbright Grants

As a general matter, preference for Fulbright Scholar opportunities will be given to candidates who have not previously received a Fulbright Scholar grant.

625 Eligibility Factors

625.1 Members of Same Family

A husband and wife are eligible to receive grants concurrently when both have applied and have been selected through the usual procedure.

625.2 Professional People

Persons in non-academic fields, such as artists, musicians, museum personnel, writers, journalists, and other professionals are eligible for Fulbright grants. Grants shall not authorize activity for which a license to practice medicine or nursing is required.

625.3 U.S. Government Employees

Federal employees who meet other qualifications are eligible for grants.

625.4 Persons Serving on Cooperating Agency Screening and Other Advisory Committees

Persons who assist the cooperating agencies by serving, without salary, on screening and other advisory committees are eligible to apply for grants, with the provision that the application identify the person as having been a member of such a screening or advisory committee.

625.5 Candidates in the Field of Religion

a. Professors of religion and professionals in religious careers whose proposals have an educational objective rather than a pastoral or missionary goal, are eligible for consideration in the regular application process.

b. Religious workers, lay or ordained, are not eligible for consideration if their projects involve engaging in pastoral, missionary, or other professional religious activities.

626 Ineligibility Factors

See Previous Experience Abroad (Section 624.1) and Previous Fulbright Grants (Section 624.2)

626.1 Persons Associated with Specific Agencies and Members of Their Families

The following persons are ineligible for grants:

a. Employees of the U.S. Department of State, for a period ending one year following the termination of such employment. This provision does not include part-time or temporary U.S. employees, U.S. consultants, or U.S. contract employees of the Department of State, unless such persons perform services related to the Bureau's exchange programs.

b. Employees of private and public agencies (excluding educational institutions) under contract to the U.S. Department of State to perform administrative or screening services on behalf of the U.S. Department of State exchange programs, for a period ending one year following the termination of their services with such agency, provided such employees have been directly engaged in performing services related to the exchange programs.

c. Officers of an organization, in the U.S. or abroad, including members of boards of trustees or similar governing bodies, or individuals otherwise associated with the organization, wherein the organization and the individuals are responsible for nominating or selecting individuals for participation in the Bureau's exchange programs, for a period ending one year following the termination of their association with such organization.

d. Members and staffs of the Commissions, for a period ending one year following the termination of their services with the Commissions.

e. Members of the Fulbright Scholarship Board, for a period ending one year following the expiration of their service on the Board.

f. Immediate families (i.e., spouses and dependent children) of individuals described in paragraphs a-e, for a period ending one year following the termination of such employment. This provision does not disqualify self-supporting members of families who live apart from their parents.

626.2 Persons Arrested for, Indicted for, Charged with, or Convicted of a Felony or a Misdemeanor

A candidate who, at the time of application, or at any subsequent time prior to becoming a grantee as defined in Section 638.1, has been convicted of commission of a felony or a misdemeanor (excluding minor traffic violations), must inform the cooperating agency, the Bureau, or the Board in writing of such fact. Similarly, a candidate who at the time of application, or at any subsequent time prior to becoming a grantee as defined in Section 638.1, has been arrested for, indicted for, or charged with a felony or a misdemeanor (excluding minor traffic violations), and the criminal matter has not been resolved, must inform the cooperating agency, the Bureau, or the Board in writing of such fact.

If the candidate has been convicted of a felony, the Board will not select such a candidate for a grant (or, if the candidate has already been selected, the Board will annul the selection) unless

the Board is satisfied that the conviction does not represent an absence of the requisite moral and social attitude desired of grantees. Such a determination will be based upon the nature of the crime, the time and place of conviction, and the subsequent conduct of the candidate. A candidate who has been convicted of a misdemeanor shall be eligible for selection unless the Board finds that the conviction represents an absence of the requisite moral and social attitude desired of grantees. Similarly, a selected candidate who has been convicted of a misdemeanor shall have his or her selection annulled only if the Board finds that the conviction represents an absence of the requisite moral and social attitude desired of grantees. Such a determination will be based upon the nature of the crime, the time and place of conviction, and the subsequent conduct of the candidate.

The Board will consider a Driving Under the Influence (DUI), Driving While Intoxicated (DWI), or equivalent misdemeanor conviction to indicate an absence of the requisite moral and social attitude desired of grantees if the incident giving rise to the conviction is within three years of the date on which the candidate would be expected to arrive in-country to begin grant activities. However, the Board may make rare exceptions in extenuating circumstances.

If the candidate is arrested for, indicted for, or charged with a felony or a misdemeanor, the application (and, if already made, the selection) may be suspended by the Board until the criminal matter is resolved, or until such time that the Board is satisfied that the arrest or the charges do not represent an absence of the requisite moral and social attitude desired of grantees.

Similarly, a candidate who, at any time after becoming a grantee as defined in Section 638.1, is arrested for, indicted for, or charged with, a felony or a misdemeanor, must inform the cooperating agency, the Bureau, or the Board in writing of such fact. The grant may be suspended by the Board until the criminal matter is resolved, or until such time that the Board is satisfied that the arrest or the charges do not represent an absence of the requisite moral and social attitude desired of grantees. If a grantee is convicted, the Board may revoke the grant.

If an application, selection, or a grant is suspended on the basis of the criteria stated above, and the matter causing the suspension has not been resolved prior to the date set for the commencement of the grant activities, the Board may reject the application, rescind the selection, or revoke the grant, as applicable. Any funds disbursed to the grantee must be immediately returned to the source.

After a revocation, the grantee is considered as not having received the grant and will not be an alumnus or alumna of the Fulbright Program.

Grants are also subject to revocation, termination and suspension as provided in Section 638.

627 Financial Factors

627.1 Financial Status

A candidate's financial need is not a factor in the selection process.

627.2 Honorary Grants

Scholars may be recommended by a Commission or post for honorary grants under the following conditions:

a. The prestige, scholarly accomplishments, or prominence of the scholar will be a significant contribution to the program.

b. The scholar is willing to contribute to some part of the program, including participation in inter-country exchanges.

c. It is generally desirable to provide the scholar with the services of the Commission.

d. That such grants be made on an exceptional basis.

628 Competition And Recruitment

628.1 Publicity and Recruitment

In order to ensure that the Fulbright Program draws its candidates from the widest possible pool of high caliber individuals, the Bureau and the cooperating agencies will actively disseminate information on the Fulbright Program in all geographic areas of the United States, at different types and sizes of institutions, both academic and nonacademic, and will engage in such other recruitment activities as are necessary to encourage participation in the Fulbright Program of persons of diverse backgrounds, representing the variety and richness of American society.

628.2 Name Requests

Under exceptional circumstances, Commissions and posts may include in a program proposal or in a special submission the names of lecturers or lecturer/researchers in whom an institution is particularly interested. More than one name may be suggested in priority order.

Foreign institutions may invite such candidates to apply with the understanding that the invitation does not constitute a commitment or a preference in final consideration. The openings for which names are suggested will be announced and all candidates will be given equal consideration.

In view of the keen competition for research grants, the Board will not consider name requests for researchers, except in those cases where the Commission or post can persuade the Board that the best interests of the program are thus served.

630 GENERAL TERMS OF GRANT

631 Passport and Visas

The grantee is personally responsible for obtaining a passport and any visas that may be required by the countries in which the project will be undertaken or through which the grantee will pass en route to the final destination. The grant does not provide for expenses related to any passport or visa fees. Such expenses must be borne by the grantee without recourse to claim for reimbursement.

632 Full-Time Nature of Grants

Grants to lecturers, researchers, and lecturer/researchers are made for purposes of fulltime research and/or teaching. Commissions or posts will discourage grantees from accepting additional employment which might conflict with the purpose of the grant.

633 Duration of Grants

The Board prefers grants for projects lasting a full academic year (8 to 10 months), but recognizes that one semester grants may also be necessary.

On an exceptional basis, grants may be made for less than a semester or a full academic year in accordance with the regulations noted below under "Short-term Grants," Section 633.3; "Serial Grants," Section 633.4; and “Flex Awards,” Section 633.5.

Country programs should never consist solely of short-term grants.

633.1 Extension of Grants

Upon application of the grantee, the Commission or post may, at its discretion, extend the grant for a period not to exceed 3 months so that the grantee's project may be completed.

633.2 Renewal of Grants

A renewal grant is defined as a grant for a second year abroad in continuation of the initial 1-year grant. Board approval must be secured for American lecturers to receive more than one renewal grant. Research scholars will not receive more than one renewal grant.

With those exceptions, renewals may be made at the discretion of the Commission or post without prior approval of the Board or the Bureau, but Commissions and posts should bear in mind that renewals limit the number of new grantees in the program.

The conditions described above do not apply to serial grants (see Section 633.4).

633.3 Short-Term Grants

Proposals for grants of less than two months are considered short-term grants and are permitted (except for students), but must be submitted to the Board for approval prior to announcement or recruitment. Approval of such a grant in one year does not imply approval for a subsequent year.

Circumstances that may warrant such short-term grants include when a candidate's availability is limited because of differences in the school year, when the affiliation is with a recognized summer school, when candidates are participating in a group seminar, or if the candidate is a Distinguished Senior Scholar or Senior Specialist. Collaborative group research program grants are considered to be basic, not short-term, grants.

633.4 Serial Grants

The Board has established serial grants to permit a grantee to undertake a project for a period from two to four months each year for up to three consecutive years. The purpose of such a grant is to provide continuity and follow-up for a grantee, who is unable to remain abroad for a longer period of time.

Among the general objectives of the serial grant are to augment the development of specific disciplines and projects and to stimulate the exchange program through a variety of activities.

Justification for such a grant in terms of the objectives of the country program will be required. Justification should include details of the grantee's program for each year of the serial grant.

Serial grantees may:

(1) present lectures and consult with officials at institutions of higher learning, (2) participate in seminars and workshops, and (3) take part in other programs under the direction of Commissions or posts.

A serial grant may not exceed eight aggregate months over a two-year period or twelve months over a three-year period. Grant benefits will include round-trip travel for each year of the grant. The Board reserves the right to terminate a serial grant before its completion under the provisions of Section 638 pertaining to revocation of grants.

633.5 Flex Awards

The Fulbright Flex Award offers scholars the opportunity to propose stays of one-to- three months’ duration each year over a period of two-to-three years. The total length of the Fulbright exchange must be no less than four and no more than six months. At least one stay during the course of the grant must be a minimum of two months in duration.

The Flex Award allows scholars more flexibility to pursue their research activities. It is designed for scholars who need to make multiple visits to a country to conduct research and for those who find it difficult to leave their home institutions during the academic year.

In addition to their research activities, Flex scholars agree to undertake activities recommended by the post or Commission, including: engaging with the host institution academic community, participating in seminars, giving public talks, and mentoring students.

Applications that propose grant periods during the host institution's academic year are preferred. Scholars who wish to visit the host institution outside of the academic year will need to demonstrate clearly how they will engage with the host institution community.

634 Postponement of Grants

Candidates selected for a grant may not postpone the grant from one academic year to the next. Candidates who are not able to accept the grant within the academic year for which it was awarded, may request that the cooperating agency resubmit the application for the following year's competition.

635 Remaining Abroad After Grant Expiration

Because a factor in selection is the expected benefit to the United States of the grantee's overseas experience, (see Section 622.5), a grantee who remains abroad after expiration of the grant without advance approval will forfeit the return travel entitlement. Approval of any additional period abroad is at the discretion of the Commission or post and the Bureau, and will be contingent upon compliance with visa regulations and any limitations imposed by the host country. A person remaining abroad after the expiration of the grant will no longer be considered a grantee and should not continue to represent himself or herself as such.

636 Temporary Country Program Suspension

Political instability or lack of personal safety may make it necessary to temporarily suspend a country program or part of that program. Such circumstances may necessitate short- or long-term withdrawal of grantees.

The Bureau, in consultation with Commissions, posts and the Board, is responsible for drawing up timely plans for such contingencies, providing guidelines to affected grantees, to cooperating agencies and to Commissions and posts.

The Board urges flexibility in providing assistance to individual grantees, including early return to the host country if feasible, short-term continuation of stipends beyond departure date from host country, temporary relocation, possible U.S. resettlement allowance, or reassignment. Factors affecting reassignment include timely request, qualifications, time remaining in grant, and timeliness of proposed host country clearance process.

637 Resignation From Grant

637.1 Personal Reasons

When serious and compelling reasons, such as personal illness, death of an immediate member of the family, or other personal situations, make it impossible for a grantee to complete the grant period, the grantee will be permitted to resign from the grant with the concurrence of the Commission or post, which should report such cases to the Bureau.

The Board recommends that a flexible policy on return travel benefits be followed so that grantees will not be penalized for circumstances beyond their control.

637.2 Early Completion of Project

Commissions may act at their discretion on requests by grantees for early departure from the host country upon satisfactory completion of their project or assignment. For non-Commission countries, early return travel must be approved by the Bureau.

637.3 Other Reasons

Resignation requests for causes other than those identified in Sections 637.1 and 637.2 above are to be reported by Commissions or posts to the Bureau for referral to the Board, which will decide on eligibility for return travel.

638 Revocation, Termination And Suspension Of Grants

638.1 Definitions

a. For the purpose of Section 626.2 and this Section 638, a grantee" is defined as a selected candidate who has signed the grant document (including all terms and conditions thereof) without qualification and has returned a signed copy of same to the corresponding cooperating agency.

A candidate who has been selected, but who has not so signed and returned the grant document, is defined as a selected candidate".

In the event a selected candidate fails to sign and return a copy of the grant document within a reasonable time after it is received by the selected candidate, the selection may be withdrawn by the Board or the cooperating agency by notice of a withdrawal delivered to the selected candidate.

b. A grant may be revoked, terminated, or suspended. After a revocation, the grantee is considered as not having received the grant and will not be an alumnus or alumna of the Fulbright Program; after a termination, unless otherwise stated, the grant will be considered to have ended when the Board announces its decision to terminate; and after a suspension, the grant will be considered inoperative until a decision is made to reinstate, revoke or terminate the grant.

638.2 Authority to Recommend Revocation or Termination

a. A Commission or post, as applicable, has authority to recommend that the Board revoke or terminate the grant held by a grantee who has departed the United States for the host country.

b. The cooperating agency has authority to recommend that the Board revoke or terminate a grant to a grantee who has not yet departed the United States for the host country.

638.3 Grounds for Revocation or Termination

In addition to the grounds specified in Section 626.2, grounds for revocation or termination include, but are not limited to: (1) violation of any law of the United States or the host country; (2) any act likely to give offense to the United States or host country because it is contrary to the spirit of mutual understanding; (3) failure to observe satisfactory academic or professional standards; (4) physical or mental incapacitation; (5) engaging in any unauthorized income-producing activity; (6) failure to comply with the grant's terms and conditions; (7) material misrepresentation made by any grantee in a grant application form or grant document; (8) conduct which may have the effect of bringing the Department of State or the Fulbright Program into disrepute; (9) violation of the Policies of the J. William Fulbright Foreign Scholarship Board.

In addition, the Board may terminate a grant, unless prohibited by law, if (1) the grantee has exhausted all benefits of health and accident insurance provided by the U.S. Department of State in connection with the grant and continued medical treatment would lead to the grantee's becoming a public charge, or (2) the grantee requires such protracted medical treatment that successful completion of the grant is jeopardized, or (3) medical information submitted in the application is found to be substantially inaccurate or incomplete. The procedure for any such termination shall be the same as that provided for the termination of grants generally, except that the recommendation for such termination, supported by the corresponding factual information, shall be made by the Bureau (not a host institution, Commission, post, or cooperating agency). In the event any such grounds occur during the period of a grant, it is the Board's policy that such grant should not be renewed or extended. Grants shall not authorize activity for which a license to practice medicine or nursing is required.

638.4 Procedure for Revocation or Termination

The procedure for revoking or terminating a grant is:

1. The Commission, post, or cooperating agency consults initially with the Bureau of Educational and Cultural Affairs and the Staff Director of the Fulbright Scholarship Board;

2. The Commission, post, or cooperating agency prepares a Statement of Fact and Recommendations for Specific Action by the Board and forwards them to the Staff Director;

3. The Staff Director provides a copy of these documents to the grantee and obtains proof of delivery;

4. The grantee sends a written reply to the Staff Director within two weeks of receipt of the documents. The Board may grant additional time for the reply if circumstances warrant. The Staff Director will inform the Board if the grantee does not reply within the specified time;

5. The Staff Director provides a copy of all documents to the Commission, post, or cooperating agency for review and to the Bureau for review, evaluation, and recommendation;

6. Following receipt of the Bureau's evaluation and recommended action, the Staff Director provides a copy of all relevant documents to the Board.

The Board will inform the grantee, the Commission or post, the relevant cooperating agency, and the Bureau, expeditiously and in writing, of the Board's decision and reasons therefore.

638.5 Financial Issues Related to Revocation, Termination and Suspension

Unless otherwise specified by the Board, when a grant is suspended, revoked or terminated, disbursement of any allowances and benefits will cease, except for return travel, and medical benefits that may be authorized under the Bureau's accident and sickness program for exchanges; the grantee will also be required to immediately repay any advances in allowances or benefits disbursed for use in the period of time after the suspension, revocation or termination. Unless otherwise authorized by the Board, Bureau, Commission or post, no further claim for disbursements of allowances or benefits will be honored. This provision shall not apply to grants, which are suspended because conditions in the host country require the departure of grantees for reasons of personal safety; in such instances, Section 636 applies.

The Bureau, the Commission or post will inform the grantee whose grant has been suspended, terminated or revoked of the impact of the Board's decision on past and future allowances and benefits; the Bureau, the Commission or post will take the necessary measures to implement the Board's decision, and to collect any advances in allowances and benefits that must be repaid.

638.6 Suspension

a. The Board, at the recommendation of a Commission or post may suspend a grant pending the procedure for revocation or termination of the grant, or if the grantee is arrested for, indicted for, charged with, or convicted of commission of a crime, either before or after the grantee’s departure from the United States, in accordance with Section 626.2.

b. The Commission or post may suspend a grant:

1. If the grantee ceases to carry out the project during the grant period;

2. If the grantee leaves the host country for more than two weeks without the prior authorization of the Commission or post;

3. If conditions in the host country require the departure of grantees for reasons of personal safety (see Section 636).

c. A grant may also be suspended if the grantee requests suspension of the grant for personal reasons and the Commission, post or cooperating agency concur.

638.7 Persons Arrested for, Indicted for, Charged with, or Convicted of a Felony or a Misdemeanor

The provisions of this Section 638 are in addition to the provisions of Section 626.2 regarding the suspension, termination, or revocation of grants to persons arrested for, indicted for, charged with, or convicted of a felony or a misdemeanor.

638.8 Notification

The cooperating agency will include Section 626, Section 631, this Section 638 and Section 639, in the grant document for signature and acceptance by the selected candidate.

639 Liability

No one or more of the Board, the U.S. Department of State, the cooperating agency, and the Commission or post will be liable for any claim or claims resulting from a grantee's failure to enter upon or to complete the program outlined in the grant, even though the failure is beyond the grantee's control, including without limitation any failure resulting from a revocation, termination, or suspension effected pursuant to Section 638 above.

640 FINANCIAL TERMS OF GRANT

The monetary amount of Fulbright grants will be set by the corresponding Commission, or, in non-Commission countries, by the Bureau in consultation with the post.

It is intended that grants for lecturers, researchers and lecturer/researchers be adequate to assure that high quality candidates are attracted to the Program and that grantees who participate will be able to fulfill their projects without experiencing undue financial hardship.

With this objective in mind, and to encourage standardization of grant benefits, the Board recommends that all grants for lecturers, researchers and lecturer/researchers include the basic grant package described in Section 641. Additional benefits may be added as needed. Exceptions to this policy are provided in Section 642.

641 Grant Benefits

641.1 Basic Grant Package

Grantees to non-Commission countries will receive the following basic grant package.

1. Round-trip transportation,

2. A basic monthly stipend,

3. A subsistence allowance,

4. Provision for housing, and

5. Health and accident insurance.

The grant may also include special allowances for books, materials, and research, as well as other benefits required by local conditions.

The grant will also include, where applicable, funds for pre-departure orientation. Commissions are authorized to develop grant packages for grantees to their countries, bearing in mind the Board's objectives as stated in Section 640.

641.2 Dependent Supplements

Definitions: A dependent is either (1) a spouse, or (2) a qualified same-sex domestic partner, or (3) a relative (child, grandchild, parent, sibling) who is financially dependent on the grantee. Accompanying dependents are those who spend at least 80% of the grant period with the grantee abroad.

In order to qualify a domestic partner for purposes of obtaining dependent supplements, the grantee must submit an affidavit containing the information set forth in Appendix II.

Grantees whose grants are for periods of at least one semester and who have accompanying dependents may receive the following benefits in addition to the basic grant package:

1. Round-trip travel for up to two accompanying dependents,

2. A monthly supplement for accompanying dependents, and

3. An educational allowance for accompanying dependent children (kindergarten through 12th grade).

If the number of accompanying dependents changes after the grantee signed the grant document, the benefits may be revised at any time before the expiration of the grant to compensate for (1) accompanying dependents not previously included, and (2) dependents born or acquired after such signature.

In either case, the revision will be retroactive to the date of arrival of the additional dependents in the host country.

641.3 Basic Monthly Stipend

Basic stipend levels will be set by Commissions or, in non-Commission countries, by the Bureau. Stipends may be paid monthly or in periodic payments through the grant period. Basic stipends may vary according to the type of grant and the grantee's seniority. The three levels are:

1. Junior lecturers (assistant professor and below, or professional equivalent) and all researchers,

2. Senior lecturers (associate professor and full professor, or professional equivalent), and

3. Distinguished Senior Scholars.

Lecturer/researchers should be paid as lecturers.

641.4 Travel and Transportation

a. All grantees will receive round-trip transportation from their homes to the place within the host country where the project is to be carried out. Travel costs will be calculated on the basis of direct round-trip economy class airfare. All airline tickets purchased using U.S. Government money must comply with the Fly America Act.

b. Grantees may also receive an excess baggage allowance to permit them to transport books, equipment, and other materials to and from their assignment as accompanied baggage.

c. If grantees arrive in a host country before the beginning date of the grant as specified in the grant document, they will not be eligible for stipends or subsistence allowance until such beginning date, unless the Commission considers that the reason for early travel is valid. The same policy applies to grantees to non-Commission countries, except that the post and the Bureau must agree to the early arrival and approve any adjustment of grant benefits.

641.5 Provision for Housing

Grantees will receive assistance for their housing either through a housing allowance or by provision of housing by the host country government or institution. The housing allowance, which will be paid in local currency or dollar equivalent, will be set by the Commission or, in

non-Commission countries, by the Bureau in consultation with the post. Adjustment will be made if the grantee is accompanied by dependents.

641.6 Subsistence Allowance

In countries where the cost of living varies widely from place to place, the Commission or post may provide a subsistence allowance designed to offset local costs. Adjustments will be made when there are accompanying dependents. All grantees living in high cost living areas will receive the same subsistence allowances, regardless of stipend levels.

641.7 Other Allowances

Allowances for research or other expenses related to the grantee's project may be provided. These allowances may be used for such items as books, journals, office supplies (not including furniture), educational material (e.g., maps, tapes, films, slides, photographs), computer equipment, secretarial services and limited translation services, limited publishing costs, and local travel essential to the completion of the project.

Nonexpendable items purchased by the grantee with such allowances should remain with the host institution upon completion of the project, unless it is determined by the Commission or post that such items are essential to the grantee for completion of the project after the grant has expired.

641.8 Health and Accident Insurance

a. The Bureau provides grantees with supplemental health and accident insurance during direct travel time to the host country, while participating in grant activities abroad, and while directly en route back to the United States. This insurance is not intended to replace the grantee's normal insurance policy, which should be maintained during the grant period.

b. In the case of a medical emergency, grantees may also request special emergency assistance not covered by the health and accident insurance policy.

c. Grantees must provide medical insurance for accompanying dependents at their own expense.

d. It is recommended that grantees obtain adequate insurance for personal property.

e. Neither the Board, the U.S. Department of State, the cooperating agency, nor the Commission or post assumes responsibility for any injury, accident, or illness (except as may be covered by any supplemental health and accident insurance provided under Section 641.8), any loss of personal property, or any other contingency which may befall the grantee or accompanying dependents during, or as a result of, the grantee's stay abroad, travel or other activities related to the grant.

641.9 Dependent Education Allowance

In non-Commission countries, the Bureau may administer a program to provide educational allowances for school-age dependent children. The purpose of this allowance is to permit dependent children to attend an English language school in the host country. Commissions are also encouraged to provide this allowance.

642 Limited Benefit Grants

642.1 Travel Only Grants

On an exceptional basis, a Commission may offer a limited number of "travel only" grants. These grants will include funds for transportation costs and will provide health and accident insurance.

642.2 Special Grants

Special grants, such as short-term grants (under 2 months), group seminar grants, serial grants, and collaborative group research program grants may have different benefits from those described in Section 641.

643 Grants To Two Members of Same Family

a. When two members of the same family receive grants but both will constitute a single household abroad, each will receive the stipend and allowances normally given a single grantee. However, only one of the grantees will receive benefits for accompanying dependants.

b. When the spouse of a lecturer, researcher or lecturer/researcher grantee is recommended by the Commission or post for a grant outside the usual competition, either before the grantee's departure from the United States or after arrival in the host country, the Commission or post may request that the spouse be nominated according to regular procedures. If such a nominee (spouse) is selected by the Board, the nominee will receive the benefits and allowances of a single grantee dating from the time of selection. Travel allowances will not be granted retroactively.

644 Duration of Benefits

644.1 Stipends and Allowances

Stipends and allowances (other than for return travel and transportation) will terminate on the grantee's departure from the host country or on completion of the project, whichever is earlier.

644.2 Health and Accident Insurance

The supplemental health and accident insurance described in Section 641.8 will terminate upon the grantee's arrival back in the United States, or on completion of the project, whichever is earlier.

644.3 Travel for Grantees Remaining Abroad After Expiration of Grant

If a grantee requests and receives permission from a Commission or post and the Bureau to remain abroad after the grant has expired, return transportation may be extended, but any increase in cost of travel after the initial period of the grant must be borne by the grantee.

See Remaining Abroad After Grant Expiration (Section 635)

644.4 Early Departure of Grantee

If the Commission or post permits early departure of a grantee, provision of return transportation is at the discretion of the Commission or post, except as specified in Section 637.

645 Benefits From Other Sources

645.1 Other Grants

A grantee must report to the sponsoring Commission or, in non-Commission countries, to the cooperating agency, all scholarships, fellowships, grants, and salaries from other sources, in dollars or in foreign currency, received by the grantee during or with respect to the period covered by the grantee's grant under the Fulbright Program. Adjustments to the Fulbright grant package may be made if benefits received from other sources duplicate benefits provided by the Fulbright grant.

645.2 Honoraria and Consulting or Other Fees Received Abroad

a. Any honoraria or other fees received abroad for special guest lectures or similar events during the grant period may be accepted by the grantee, subject to the concurrence or the sponsoring Commission or post. The grantee should inform the Commission or post of any such offer.

b. Grantees invited by Commissions or posts to lecture or consult in other countries during the grant period may receive travel expenses and per diem, but not honoraria, from Commissions or posts in those countries.

c. Grantees may accept fees or other remuneration for work unrelated to the Fulbright grant during the grant period provided such work does not conflict with the responsibilities under the grant.

645.3 U.S. Government Employees

A grantee on leave without pay from U.S. government employment may receive all benefits normally provided to grantees.

If the grantee continues to receive compensation from the employer agency, compensation and benefits under the Fulbright grant may be adjusted accordingly.

645.4 Veterans

No deduction will be made from grants because of dollar funds received by the grantee as educational benefits under Title 38, United States Code.

645.5 Sabbatical Leave

No deduction will be made from grants for sabbatical salary. The Board encourages institutions of higher learning and private foundations and organizations in the United States to pursue a liberal policy with respect to permitting recipients of grants under the Fulbright Program also to retain college or university sabbatical benefits, or dollar grants from private foundation funds during the term of the grant.

645.6 Federal Retirees

No deduction will be made from grants because of dollar funds received by the grantee as benefits derived from the Civil Service Retirement Act (5 U.S.C. 8344(a)).

650 INCOME TAX LIABILITY

Grantees will be responsible for determining their individual United States income tax liability resulting from their grant. The extent of liability is set forth in the Internal Revenue Code of 1954, as amended.

660 INTERCOUNTRY EXCHANGES

a. Commissions and posts are authorized to include, in program plans, grants for visits to and from neighboring countries by grantees who are overseas during any given year. The general purposes of these intercountry exchanges are:

1. to provide scholars for special seminars or lectures in areas of specialization not included in the program of the country visited;

2. to provide consultative services on programs a Commission or post may wish to develop; and

3. to provide the grantee with an opportunity to extend professional interests to another country.

b. Although the policy emphasizes especially scholars who are grantees in the current year program, Commissions and posts may invite former American grantees who may be abroad under other auspices to take part in intercountry exchanges.

c. Arrangements for intercountry exchanges should be kept as flexible and informal as possible. They should be developed between two Commissions or posts and they should not interfere with the effective accomplishment of the grantee's original project.

d. Expenses of intercountry exchanges will be arranged at the discretion of the participating Commission or post; they will be borne, in general, by the Commission or post that is host to the particular visit. However, a grantee who leaves the host country, where dependents may remain, should not have basic grant benefits reduced during the period of the intercountry exchange.

Other ways of financing intercountry exchanges may include support from host institutions and use of excess foreign currencies.

e. Intercountry grants that are scheduled during the regular grant period should not ordinarily exceed 2 weeks; however, such a grant scheduled after the completion of the original grant may be longer.

670 RESPONSIBILITIES AND RIGHTS OF GRANTEES

As provided in U.S. law, all recipients of Fulbright academic exchange grants will have full academic and artistic freedom, including freedom to write, publish, and create, and no grant made by the Board may be revoked or diminished on account of the political views expressed by the recipient or on account of any scholarly or artistic activity that would be subject to the protections of academic and artistic freedom normally observed in universities in the United States. It is the policy of the Board to ensure that the academic and artistic freedoms of all persons receiving grants are protected.

Grantees are responsible for observing satisfactory academic and professional standards and for maintaining a standard of conduct and integrity that is in keeping with the spirit and intent of the Fulbright Program and that will contribute positively to the promotion of mutual understanding between the peoples of the United States and those of other countries. Grant recipients are expected to obey the laws of the United States.

A person accepting a grant is not by virtue thereof an official or employee of the U.S. Department of State or other agency of the Government of the United States of America, or of an agency of the government of the home country.

680 PUBLICATIONS RESULTING FROM GRANT

The Board welcomes the publication and dissemination through the usual channels of the results of research and other educational activities financed under the Fulbright Program. Authors should take care to avoid any impression that the Government of the United States or any agency representing it has endorsed the conclusions or approved the contents of the publication.