PROJECT OBJECTIVES, GOALS, AND IMPLEMENTATION (POGI)

FY 2024 Study of the U.S. Institutes for Secondary Educators

Funding Opportunity Number: SFOP0010160

Office of Academic Exchange Programs, Study of the U.S. Branch (ECA/A/E/USS)

The POGI guidelines apply specifically to the Notice of Funding Opportunity (NOFO) issued by the Office of Academic Exchange Programs Study of the U.S. Branch for the FY 2024 Study of the U.S. Institutes for Secondary Educators. Your proposal must conform to the solicitation, the guidelines stated in this document, and the standard Proposal Submission Instructions (PSI). Any application not adhering to the conditions set forth herein may be deemed technically ineligible. These guidelines are specific to the program mentioned above and are IN ADDITION TO the guidelines outlined in the PSI. If there is a perceived disparity between documents, the solicitation is to be the dominant reference.

I. STATEMENT OF WORK

Recipient Responsibilities:

The responsibilities of the recipient organization are as follows:

- Provide overall coordination and management of the Study of the U.S. Institutes for Secondary Educators;
- 2. Design and oversee three approximately five-week Study of the U.S. Institutes for Secondary Educators at academic institutions in the United States for approximately 60 participants total (20 per institute) beginning no earlier than June 1, 2025 and ending no later than August 15, 2025;
- 3. Provide and monitor subawards to selected host institutions to conduct the Institutes. Each host institution should not implement more than one Institute; the recipient may choose to implement one Institute;
- 4. Oversee the program curriculum and other activities for all three Institutes, ensuring that they align with program goals and objectives;
- 5. Provide Institute syllabi and program calendars to the Bureau of Educational and Cultural Affairs (ECA) for review and approval before the start of the Institutes;
- 6. Prepare DS-2019 forms for all participants and send these forms to the U.S. embassy or consulate well in advance of program start dates to allow for J-1 visa interview scheduling;
- 7. Enroll participants in ECA's health benefits program, Accident and Sickness Program for Exchanges (ASPE), and/or other health benefits plan as directed by ECA for the duration of the Institutes and issue health benefits identification cards for each participant;
- 8. Ensure that each participant completes and signs all required pre-program forms provided by ECA;

- 9. Develop health and safety protocols to protect the welfare of all participants.
- 10. In coordination with U.S. embassies and consulates or Fulbright commissions, arrange and purchase international round-trip travel for participants;
- 11. In coordination with U.S. embassies and consulates or Fulbright commissions, arrange and purchase any pre-program travel related to visa issuance;
- 12. In coordination with host institutions, U.S. embassies and consulates, and Fulbright commissions, make logistical and administrative arrangements for participants, such as pre-departure information, airport pick-up and drop-off, lodging and meals, domestic travel, any medical treatment, and program funds disbursement including travel allowances; communicate this information to participants prior to the program start date;
- 13. Inform and consult with ECA about any program or participant problems, emergencies, or other issues as well as the progress of any necessary action;
- 14. Develop and implement, in coordination with ECA, a communications and digital media strategy to promote the program;
- 15. Ensure strict compliance with State Department branding and signage requirements at events, in remarks, in program documentation, and in online content;
- 16. Provide participants with follow-on guidance and resources and facilitate continued interaction among participants after the program;
- 17. Create and maintain a database of program alumni that includes alumni success and impact stories; share these stories with ECA throughout the year;
- 18. Conduct program performance monitoring and evaluation according to the MODE framework requirements as outlined in section D.10. of the NOFO;
- 19. Manage ECA funds for this activity;
- 20. Submit required financial and program reports to ECA on-time, and provide weekly updates to the program office during the implementation period;
- 21. Provide reasonable accommodations for participant needs, including disabilities and medical or dietary restrictions, as necessary;
- 22. Prepare and print certificates of completion for participants who successfully complete their respective programs; and
- 23. Assume overall responsibility for complying with all applicable tax treaties and Federal, state, and local laws on tax withholding and reporting for participants.

Substantial Involvement:

In a cooperative agreement, the Department is substantially involved in program activities above and beyond routine monitoring, as follows:

1. ECA will make final participant selections and provide a list of selected finalists to the implementing partner.

II. PROGRAM SPECIFIC GUIDELINES

A. Overview

The U.S. Department of State's ECA invites proposal submissions for the design and implementation of three five-week Study of the U.S. Institutes for Secondary Educators. Each institute should be designed for a group of approximately 20 secondary-level educators from around the world as specified in the NOFO. Two of the Institutes will be for teachers; one Institute will be for education administrators including, but not limited to, curriculum developers, ministry of education officials, teacher trainers, and textbook writers. Study of the U.S. Institutes for Secondary Educators are designed to strengthen curricula and improve the quality of teaching about the United States in secondary schools and academic institutions abroad.

Proposals should present a creative, thematically coherent program that draws upon institutional strengths, including faculty and other resources as well as recognized scholars, educators, and other experts from throughout the United States. An academically rigorous program should introduce the participants to the history and evolution of U.S. culture, society, education, and values, and should allow participants to interact with diverse groups of Americans. Institutes should be designed with the goal of helping educators strengthen curricula and improve the quality of teaching about the United States in secondary schools and academic institutions abroad. Although the main focus of the Institutes is not the U.S. education system nor the study of pedagogy, Institutes should briefly introduce participants to U.S. pedagogical philosophies and teaching practices. The Institutes will take place in summer 2025.

All aspects of the program, including presentations and other class work, should be integrated to emphasize the Institute theme. The program must contribute to the participants' understanding of the United States. The NOFO for this competition gives further direction on program substance. It is essential that proposals provide a full, detailed, and comprehensive narrative describing how the recipient and/or host institutions will achieve the Institutes' objectives. A sample academic program, including lectures, discussions, presentations, site visits, study tour, and other relevant documents, should be included. Proposals will be reviewed according to the review criteria listed in the NOFO.

Please note: ECA reserves the right to reduce, revise, or increase proposal budgets and number of participants based on program needs and the availability of U.S. Government funding.

B. Program Dates

Pending the availability of funds, the anticipated award for the cooperative agreement will begin on or about September 1, 2024, and end on or about December 31, 2028, including two non-competitive continuations of the award. The Institutes for Secondary Educators should

begin no earlier than June 1, 2025, and should conclude no later than August 15, 2025. The Institutes should be approximately five weeks in length, including participant arrival and departure days. The three Institutes are not required to begin on the same date. ECA reserves the right to change these dates based on program needs.

C. Program Administration

Applicants should discuss their capacity to successfully manage international exchange programs, including institutional strengths, such as relevant experience, departments, and major administrative units. Proposals should include a staffing plan that details how staff will fulfill responsibilities.

The award recipient must designate a **project director** to oversee all of the Institutes. The project director will coordinate logistical and administrative arrangements, ensure an appropriate level of continuity and consistency among the various host institution programs, oversee alumni programming, and serve as the principal liaison between ECA and the host institutions. The project director will serve as ECA's primary point of contact. The project director is required to attend a partner retreat that will take place either virtually or in-person in Washington, DC, at least six weeks before the start of the program.

The award recipient must designate an **academic director** at each host institution who will be present throughout the Institutes in their entirety to ensure the continuity, coherence, and integration of all aspects of the Institute, including the study tour. The academic directors will plan and implement the program at their respective host institution, oversee its day-to-day management, and monitor program participants. In addition, an **administrative director** or coordinator must be identified at each host institution to oversee all administrative support services, including program participant supervision, participant health and safety, budget, logistics, reporting, and other administrative arrangements.

Other staff may be designated as appropriate. Program coordinators and/or graduate student assistants may be employed to carry out clerical duties and to assist with the day-to-day concerns and participant needs, but they should not act as participants' principal points of contact.

D. Participants

Each Institute will host approximately 20 experienced secondary-level school teachers or administrators, for a total of about 60 participants. Two of the Institutes will be comprised of teachers, most of whom teach English as a foreign language, social studies, or a related field; the third Institute will be comprised of administrators (principals, vice principals, etc.), teacher trainers, textbook writers, curriculum developers, and/or ministry of education officials. Participants will come from all world regions and will be fully proficient in English. They will be

seeking to increase their knowledge of American life to enhance their professional knowledge and scholarship and improve courses they may teach on the English language and/or the United States in secondary schools and other educational, training, and research institutions abroad.

Participants may come from educational institutions where the study of the United States is relatively well-developed, or from areas where study of the English language and the United States is limited. Participants will be varied in terms of age, professional position, and international travel experience, and will have varied levels of experience teaching about the United States. In all cases, participants will be experienced educators who are prepared for an intellectually rigorous academic seminar that offers a collegial atmosphere conducive to the exchange of ideas.

ECA is committed to ensuring that participants with disabilities are able to fully participate in the program through reasonable accommodation and support. The award recipient will be responsible for working with the host institutions to provide reasonable accommodations that will allow for a full and engaging experience for all participants.

The award recipient will NOT participate in candidate selection. U.S. embassies and consulates will identify and nominate participants. ECA will make the final selections and will send the final list of participants for each Institute to the award recipient. Every effort will be made to select a gender-balanced group and to recruit participants who are from underserved communities and have had little or no prior experience in the United States.

E. Program

Each Institute should include an approximately four-week academic residency on a U.S. university or college campus and an approximately one-week educational study tour. Applicants are encouraged to draw upon any unique institutional strengths through faculty and other resources.

Academic Residency

The academic residency component should:

- Be a custom-designed and well-integrated seminar that imaginatively combines lectures, panels, seminar discussions, readings, debates, school and site visits, and regional travel into a substantive, cohesive, and coherent program.
- Be tailored for these particular Institutes and not replicate an existing lecture course, survey, or graduate seminar designed for American degree candidates;

- Provide participants with a formal opportunity early in the program to present or discuss their own research or teaching interests, work environments, and/or other educational issues in their home countries. The audience for these discussions should include other participants, host faculty, American peers, program presenters, and other members of the host institution and local community.
- Provide sufficient time for a collegial exchange of views among participants, lecturers, and panelists. Discussion should be encouraged not only through question-and-answer sessions but also through organized debates, roundtables, and other for that allow active engagement between participants and presenters.
- Include day trips or optional weekend excursions to various nearby locations which could include historical sites, schools, places of worship, government offices, museums, media offices, etc. These visits should relate to the Institute's academic objectives.

Study Tour

The study tour for the Institutes should:

- Directly complement and reinforce the academic residency of each Institute.
- Be arranged and led by the academic director and principal project staff.
- Be approximately one week long. It should expose the participants to a community (or multiple communities) representing a culture and/or region distinct from that of their academic residency. If appropriate, the study tour segment may be interspersed with the academic residency, though the total time allotted for the study tour should be approximately seven days.
- Include an appropriate mix of professional-level meetings relevant to the Institute's objectives, visits to cultural institutions, and recreational activities.

The proposal must specify the proposed study tour location or other destinations to be visited, as well as specific sites. Please note, staff escorts travelling on the study tour must have demonstrated qualifications to accompany exchange visitors.

Please note: The Study of the U.S. Branch may request that the award recipient modify the academic residency and/or study tour. Similarly, the award recipient, in consultation with the Study of the U.S. Branch, may also wish to make program modifications. Any requested changes must remain within the scope of the original program objectives.

F. Independent Research and Free Time

Each Institute should provide opportunities for limited but well-directed independent research. Participants should have a limited amount of time each week to pursue individual research interests, curriculum development projects, or to catch up on assigned readings. Host institution faculty from departments related to the participants' scholarly interests should be available to offer advice on their individual research projects, to help facilitate their access to resources, and act as peer collaborators as appropriate. Given the intensive Institute schedule, participants will be made aware that opportunities for research will be limited.

Participants should have sufficient free time outside the academic sessions to pursue individual interests, such as socializing with U.S. peers, exercising, and relaxing. Participants should also have opportunities to attend cultural events, such as concerts, sporting events, and formal or informal gatherings of ordinary Americans from a variety of ethnic, social, and professional backgrounds.

G. Logistical Considerations

• Housing and meal arrangements are an important dimension of program planning and must be discussed in detail in the proposal. In general, participants should be housed on campus in university graduate dorms, similar designated university housing, or other suitable locations, ideally within walking distance of daily classes. Each participant should have a private bedroom during the academic residency portion, and bathrooms should not be shared among more than three participants. Accommodations should respect each participant's privacy and comfort and be conducive to study and relaxation. Participants would ideally have access to kitchen facilities, either in their own rooms or in a common room. A cafeteria meal plan combined with a cash allowance for food that will permit participants to cook or eat at local restaurants is strongly recommended. Participants may experience difficulties with U.S. eating customs due to religious or other dietary restrictions, cultural differences, and unavailability of familiar foods. Institute staff should consider any dietary, religious,

medical, or living requirements and be prepared to discuss any challenges with the participants. Institute staff should consider conducting a pre-arrival survey of participant dietary and/or religious needs to better accommodate their needs. To the extent permitted by budget limitations, participants should receive up to the U.S. government per diem rate for meals and incidental expenses at the various program locales. See http://www.gsa.gov/perdiem for current U.S. government per diem rates.

- Participant health and safety is an ECA priority. The recipient should consider the
 health, safety, and welfare of participants at all times. This includes assisting
 participants to understand the ECA-sponsored Accident and Sickness Program for
 Exchanges (ASPE) health benefits program and to navigate the complex healthcare
 system in the United States. The recipient and sub-recipients should also help
 participants understand and navigate any national, state, local, and campus health or
 safety policies.
- Participant forms are required from each participant. Required forms include, but are
 not limited to, the SUSI terms and conditions, a medical form, and a media release form.
 The recipient is responsible for disbursing and collecting signed forms from participants.
 The recipient should notify ECA of any potential concerns or issues. All forms should be
 safeguarded since they contain Personally Identifiable Information (PII).
- Virtual pre-departure orientation workshops (PDOs) should be organized by the
 recipient for all participants in preparation for the Institutes. Topics may include, but
 are not limited to: setting expectations; U.S. cultural norms; diversity, equity, inclusion
 and accessibility; cross-cultural adjustment; health and safety guidelines and practices;
 and logistics. Pre-departure materials should be available to participants online or
 emailed at least six weeks before the Institutes' start.
- An administrative orientation to the United States and to the host campus for the participants should address administrative details of the program, identify campus and local resources, review safety and security procedures, and provide general information that will facilitate the participants' adjustment to daily life in a new environment. Important topics include security, medical issues and protocols, harassment and reporting, transportation, per diem, and availability of foods to which participants are accustomed or that meet specific dietary requirements.
- An academic orientation should provide participants with a concise overview of the
 program, including principal objectives and major themes. The academic director
 should discuss guidelines for behavior that encourage active participation, respect for
 the views of other participants, concise comments and questions to keep participants

on-topic, and other parameters that will promote effective discussion throughout the program.

- Opening and closing events (e.g., luncheon, dinner, or reception) should formally inaugurate and close the program. These events typically include representatives from the host institution and individuals from the larger community.
- Access to resources should be arranged, including campus libraries, computer and internet facilities, gymnasium or fitness center, health services, on-campus disability resources, counseling services, and local and national newspapers, periodicals, radio, and television. Host institutions should conduct a formal orientation to library services during the first week of the program and should provide participants with computer training and technical support, as needed. Applicants should budget at least \$2,000 per Institute for reasonable accommodations for participants with disabilities.
- Monitoring and Evaluation should be conducted according to the MODE framework
 requirements as outlined in section D.10. of the NOFO. The recipient should ensure
 participants have time reserved during the program to complete surveys throughout the
 program. Copies of surveys and raw data should be available to the ECA program officer
 upon request. Additionally, the recipient will be responsible for collecting alumni
 success stories to share with the ECA program office.
- Travel Allowances should be disbursed to support in-transit costs incurred during travel to and from the United States. The ECA program office suggests approximately \$100 per participant (\$50 each way) for travel allowances.

H. Fostering Mutual Understanding

ECA's mission is to foster mutual understanding between the people of the United States and the people of other countries to promote friendly and peaceful relations. To promote this mission, the program should provide ample opportunity to attend informal and formal gatherings of ordinary Americans from a variety of ethnic, social, and professional backgrounds as well as with U.S. college students. Wherever feasible, interactions should allow for participants to exchange views with Americans, not just learn from hosts, speakers, and presenters. Opportunities for participants to share their research and culture with a diverse group of Americans can take many forms, including, but not limited to: discussion sessions, conferences, receptions, poster sessions, school visits, community service activities, peer mentoring programs, individual consultations with relevant academics, holiday celebrations, international potlucks, cultural festivals, and host family experiences.

I. Alumni Outreach and Follow-On Activities

Proposals should provide plans for continued follow-on activities (with minimal ECA support) that ensure ECA-supported programs are not isolated events. Proposed activities for alumni must reflect the goals and objectives of the program and contribute to ECA's mission to foster mutual understanding between the people of other countries and the people of the United States. The proposal should include an outline of follow-on programming (including a timeline), information on how it will be coordinated with existing alumni efforts, and a description of how the applicant will foster and maintain long-term linkages with alumni. Examples of successful past follow-on activities include, but are not limited to: structured mentoring programs, small grant competitions, alumni reunions or workshops, monthly web discussions, reverse exchanges, cooperative publications by participants and their American peers, and/or distance learning opportunities for alumni.

Applicants should incorporate the online community on the International Exchange Alumni website (alumni.state.gov) into their alumni outreach plans.

Follow-on activities should be well-developed but also remain flexible enough to allow for changes based on the participants' needs. Alumni activities should be financed using the line item budgeted for follow-on activities (up to \$5,000) as well as significant cost-sharing by the applicant organization. Please refer to the PSI for additional information.

III. PROPOSAL CONTENTS

Applicants should submit a complete and thorough proposal describing the program in a convincing and comprehensive manner.

Since there is no opportunity for applicants to meet with reviewing officials, the proposal should respond to the criteria set forth in the solicitation and other guidelines as clearly as possible.

Proposals should address succinctly, but completely, the elements described below and must follow all format requirements.

NOTE: Proposals submitted through Grants.gov may only be submitted in the following formats:

- Microsoft Word
- Microsoft Excel
- Adobe Portable Document Format (PDF) Prior to submitting applications through Grants.gov, please ensure you meet all Grants.gov system and software requirements, including Adobe software compatibility. You can verify if your version of Adobe software is compatible with Grants.gov, by visiting https://www.grants.gov/web/grants/applicants/adobe-software-compatibility.html.
- ASCII Text

Joint Photographic Experts Group (JPEG images)

Proposals should include the following items. All documents should be appropriately and clearly titled.

Online Forms

- SF-424, "Application for Federal Assistance"
- SF-424A, Budget Information Non-Construction Programs
- SF-424B, "Assurances Non-Construction Programs," (only required for organizations
 if its representations and certifications have not been completed in the System for
 Award Management (SAM.gov). If an organization is exempt from registering in
 SAM.gov, then it would still need to provide the form as part of its application.)
- Include other attachments, if applicable, such as the Negotiated Indirect Cost Rate Agreement (NICRA), form 990 Return of Organization Exempt From Income Tax, SF-LLL Disclosure of Lobbying Activities (only required for organizations that engage in lobbying activities), etc.

Program Narrative

Executive Summary (One page)

In one double-spaced page, provide the following information about the project:

- 1. Name of organization/participating institutions
- 2. Beginning and ending dates of the program
- 3. Proposed theme
- 4. Nature of activity
- 5. Funding level requested from the Bureau, total program cost, total cost sharing from applicant and other sources
- 6. Scope and Goals
 - a. Number and description of participants
 - b. Wider audience benefiting from program (overall impact)
 - c. Geographic diversity of program, both U.S. and overseas
 - d. Fields covered
 - e. Anticipated results (short and long-term)

Narrative

In a maximum of 20 double-spaced, single-sided pages, provide a detailed description of the project addressing the areas listed below.

- 1. Vision (statement of need, objectives, goals, benefits)
- 2. Participating Organizations
- 3. Program Activities (advertisement, recruitment, orientation, academic component, cultural program, participant monitoring)
- 4. Program Performance Monitoring and Evaluation

- 5. Follow-on
- 6. Project Management
- 7. Work Plan/Time Frame

Additional Information to be Submitted

- Detailed Budget: The Bureau reserves the right to reduce, revise, or increase proposal budgets in accordance with the needs of the program and the availability of funds.
- Calendar of activities/itinerary
- Letters of endorsement
- Resumes and CVs (resumes of all staff should be included in the submission; no resume should exceed two pages.)
- First Time Applicant Attachments, if applicable.

All budget guidelines must be followed. The budget should indicate any cost sharing in the form of in-kind or cash contributions to the program from sources other than the Department of State. See standard guidelines (PSI) in the Solicitation Package for information on cost sharing and the cost of audits.

You may request a budget template in Excel format by contacting Copeland Barnes and Maegen Smith at BarnesCL@state.gov and SmithMC@state.gov. Please note that you are not required to use this template. There are three tabs in this document, the Budget Guidelines, Budget Categories, and the Detailed Budget Template. Applicants should complete tabs 2-3, where applicable. If applicable, **separate budgets for sub-awardees** should be included and should resemble the Detailed Budget Template for the applicant. You are urged to be as detailed and specific as possible, adding line items if needed. You may wish to include any of the listed allowable costs.

Allowable costs include, but are not limited to:

- Staff salaries and benefits (fringe benefits should be stated separately from salary costs). Each staff person must be listed separately. Provide the percentage of time spent on the program;
- Institute costs including, but not limited to, honoraria for speakers (not to exceed \$250 per day), educational materials, lodging, room rental(s), and welcome and farewell events;
- Travel costs including, but not limited to, round-trip international airfare, visa travel, ground transportation, and domestic travel;
- Per participant allowances including baggage allowance, international travel allowance (approximately \$100 per participant), book and cultural allowance (approximately \$200 per participant), and meals and incidentals;
- Follow-on activities (up to \$5,000);
- Other direct expenses;

- Tax withholding;
- Wire transfer fees;
- Consultant fees;
- Printing and publishing;
- Program supplies;
- Postage;
- Web hosting;
- Communications (e.g., participant cell phones or SIM cards);
- Health benefits, if necessary;
- Medical costs such as medically required quarantine (outside of medical facilities covered under the health benefits provider);
- Reasonable accommodations (at least \$2,000);
- Travel costs for partner retreat in Washington, D.C.;
- Institute sub-award costs, if applicable; and
- Indirect costs.

Please refer to the Solicitation Package for complete budget guidelines and formatting instructions.

Please be sure to include a Summary Budget on a separate page before the Detailed Budget. The Summary Budget should clearly indicate the number of program participants and provide an overall unit cost per participant as well as a unit cost breakdown by budget category. A sample of this format is provided on the second tab of the sample budget.

Please include a Budget Narrative that concisely explains how costs were calculated and the rationale for including them in the budget. The Budget Narrative should also explain costs for sub-awardees, if applicable. Please make note of the following in the Budget Narrative:

- If you do not have an established negotiated indirect cost rate agreement (NICRA),
 please explain what costs are excluded when calculating the Modified Total Direct Costs
 (MTDC) base in accordance with 2 CFR 200.68 Modified Total Direct Cost (MTDC) and 2
 CFR 200.414 Indirect (F&A) Cost.
- List and explain the participant support costs.
- State if the above two questions are part of your organization's existing policies and if they are consistently applied in all budgets throughout your organization.

Applicant institutions should attempt to maximize cost-sharing throughout the program by enlisting the support of the U.S. private sector, including foundations and corporations. ECA reserves the right to reduce, revise, or increase proposal budgets and participant numbers based on program needs and the availability of U.S. Government funding.

IV. OTHER AWARD INFORMATION

Adherence To All Regulations Governing The J Visa

ECA places critically important emphasis on the security and proper administration of Exchange Visitor (J visa) Programs and adherence by award recipients and sponsors to all regulations governing the J visa. Therefore, proposals should demonstrate the applicant's capacity to meet all requirements governing the administration of Exchange Visitor Programs as set forth in 22 CFR 62, including the oversight of Responsible Officers and Alternate Responsible Officers, screening and selection of program participants, provision of pre-arrival information and orientation to participants, monitoring of participants, proper maintenance and security of forms, record-keeping, reporting and other requirements.

The award recipient will be responsible for issuing DS-2019 forms to participants in this program. A copy of the complete regulations governing the administration of Exchange Visitor (J) programs is available at http://J1visa.state.gov or from:

Office of Private Sector Exchange Designation U.S. Department of State SA-5, Floor C2, Room C2L13 2200 C Street, NW Washington, DC 20522

Please refer to Solicitation Package for further information.

V. APPLICATION SUBMISSION

The solicitation document indicates the date the complete proposal is due and the manner in which proposals must be submitted. **There are NO EXCEPTIONS to this deadline.** For further information regarding this program, call Program Officers Copeland Barnes and Maegen Smith at (202) 709-0924 and (202) 340-7347, ECA/A/E/USS; email: BarnesCL@state.gov and SmithMC@state.gov.