

PROJECT OBJECTIVES, GOALS, AND IMPLEMENTATION (POGI)

FY 2022 Fulbright Specialist Program

Funding Opportunity Number: SFOP0007709 **Office of Academic Exchange Programs (ECA/A/E)**

The POGI guidelines apply specifically to the Notice of Funding Opportunity (NOFO) issued by the Office of Academic Exchange Programs (ECA/A/E) for the FY 2022 Fulbright Specialist Program. Proposals must conform to the NOFO, the Guidelines stated in this document, and the standard Proposal Submission Instructions (PSI). Applications 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 Standard Guidelines outlined in the PSI. If there is a perceived disparity between the standard and program specific Guidelines and the program information supplied in the accompanying NOFO, the NOFO is to be the dominant reference.

I. STATEMENT OF WORK

Pending the availability of funds, the Bureau of Educational and Cultural Affairs (ECA) of the U.S. Department of State will enter into a Cooperative Agreement with an accredited post-secondary U.S. institution (community colleges, liberal arts college, public or private university), or a public or private U.S. non-profit organization meeting the provisions of a 501(c)3 to administer the FY 2022 Fulbright Specialist Program. The Fulbright Specialist Program annually provides approximately 465 awards to U.S. academics and professionals (such as attorneys, business professionals, scientists, artists, public policy and public health professionals, and journalists) who possess significant professional, academic or artistic experience in their respective field, to build capacity and promote linkages between their home and overseas host institutions by engaging in short-term, collaborative projects abroad. ECA reserves the right to reduce, revise, or increase funding amounts and participant numbers, pending the availability of FY 2022 funds, the needs of the program, and U.S. Department of State priorities.

Proposals should demonstrate flexibility and creativity in program planning and administration given the ongoing global crisis presented by the COVID-19 pandemic. The crisis may pose significant challenges to normal or routine program administration in all areas, including recruitment, outreach, screening and selection, and post-nomination services for U.S. specialists, and host institution, monitoring and support services. When appropriate, proposals should discuss areas of possible impact on program operations and present alternatives to normal program operations to mitigate further program disruption. As relevant, proposals should present options for virtual activities to augment in-person engagement with all program stakeholders.

Responsibilities for the Fulbright Specialist Program include:

A.1 Recruitment

The award recipient will prepare a creative and comprehensive plan for the recruitment of applicants for all Fulbright Specialist grant opportunities. A successful recruitment plan will provide specific strategies of attracting a well-qualified and diverse pool of applicants. All aspects of diversity included in ECA's Diversity Statement should be addressed in the recruitment plan including institutional, geographic, racial, gender, ethnic, age, religious, socio-economic status, disability, sexual orientation, and gender identity. It should also account for diversity of traditionally underrepresented groups in the Fulbright Program from all parts of the country (urban/suburban/rural) and a wide range of religious, political, and cultural backgrounds and viewpoints. Applicants should include targeted recruitment efforts to attract qualified minority applicants from minority-serving institutions (MSIs) and majority institutions, applicants with disabilities, from different categories of higher education institutions (based on Carnegie classifications), including community colleges, and from diverse academic fields. ECA will approve all elements of the recruitment plan before implementation.

Particular attention should be paid to developing new and innovative approaches to recruit U.S. academics and professionals to be matched to projects in countries or regions traditionally underrepresented in academic exchanges or for which recruitment of U.S. scholars and professionals is challenging. Emphasis should be placed on countries that are of importance to U.S. foreign policy interests, as identified by ECA. Attention should also be paid to developing protocols for recruiting specialist candidates whose disciplines reflect U.S. foreign policy priorities, including, but not limited to combating disinformation, critical approaches to consumption of media content, trends in media technology, civil society and good governance, public health, climate change, and an interest in geographic locations such as Southeast Asian nations and Sub-Saharan Africa. Priority should be placed on ensuring the capacity to carry out rapid-response projects, which aim to address high priority or urgent needs and challenges identified by posts/commissions abroad on a timely basis or potentially with accelerated timelines, as feasible.

The recruitment plan for U.S. applicants should make clear the primary purpose and audience for key messages, making sure to differentiate between recruitment and general program promotion, and must include:

- Proposed recruitment materials and activities, including, but not limited to, print and online content, social media, videos, infographics, conferences, campus visits, and other in-person or virtual outreach events. All materials and communications must reflect the Fulbright brand narrative and include the Fulbright logo/visual identity.
- A strategy for utilizing virtual recruitment tools, including videoconferences, and a roadmap for implementing a series of high-quality general information and program-specific webinars. It is expected that virtual recruitment activities be implemented in tandem with effective in-person activities, as part of a comprehensive recruitment strategy.
- A plan to reach applicants outside of academia (e.g. attorneys, business professionals, scientists, public policy professionals, artists, and journalists), particularly in disciplines of importance to U.S. foreign policy interests.

- A plan to reach applicants with foreign language skills, especially those with priority foreign languages (such as Arabic, French, Indonesian, Portuguese, Russian, and Spanish), and in additional languages as requested by potential host institutions abroad.
- Strategic approaches to attracting faculty and administrators from community colleges, minority-serving institutions (such as HBCUs and HSIs), and minorities on majority serving campuses, as well as recommendations for reaching applicants from rural, economically disadvantaged, and other underrepresented communities in the United States.
- Detailed methods for recruiting applicants from specific disciplines and ideas for coordinating with Fulbright commissions and U.S. embassies on outreach to U.S. scholars and professionals.
- Strategies for including Fulbright Specialist Program alumni in recruitment initiatives and activities designed to attract new applicants
- Assist Fulbright Specialist Program alumni in highlighting their Fulbright alumni status, and encourage alumni to share their Fulbright experience, at discipline-specific or other conferences not related to academic exchange. Propose methods for highlighting the Fulbright status of these alumni, including their professional achievements, to all conference attendees.
- Ideas for proposed staff travel to engage with campuses and program stakeholders through workshops, conferences (including NAFSA: Association of International Educators, Association of International Education Administrators (AIEA), Hispanic Association of Colleges and Universities (HACU), meetings, etc.). This may also include international meetings and training activities with program stakeholders, in coordination with ECA.
- A plan for print and electronic recruitment and outreach publications (flyers, one-pagers, brochures, etc.) to recruit candidates for specialist project proposals submitted by overseas host institutions, embassies, and Fulbright commissions (including impact stories, data, and infographics from current specialists and alumni).
- A plan for innovative uses of the Fulbright Specialist Program website and social media platforms for both specific recruitment and general program marketing purposes.
- Ideas for potential partnerships with academic, non-profit, and private sector organizations to help reach new prospective applicants for the Fulbright Specialist Program.
- A plan for recruitment advertisements (both print and electronic) in relevant and targeted publications.

Recruitment assistance for Fulbright commissions, U.S. embassies, and host institutions should include:

- A plan for print and electronic recruitment and outreach publications or templates (such as flyers, one-pagers, brochures, videos, infographics, etc.) which may be modified by Fulbright commissions and U.S. embassies to recruit candidates for Fulbright Specialist project proposals submitted by host institutions, U.S. embassies, and Fulbright commissions. All materials and communications must reflect the Fulbright brand narrative, including the Fulbright logo/visual identity.

- A strategy for utilizing virtual tools and materials to assist Fulbright commissions or U.S. embassies to raise the awareness of the program to potential host institutions in strategic locations (as identified by ECA), including but not limited to promotional videos and other relevant virtual content, as requested by ECA/A/E or Fulbright commissions and/or U.S. embassies. A plan to share and distribute any materials in a format that can be edited and translated to local languages by others who work on the specialist program in countries in which the local language is relevant.

In addition to providing a recruitment plan, the award recipient will:

- Propose appropriate staffing levels to effectively implement all proposed activities and initiatives in its recruitment plan.
- Develop various materials to demonstrate the impact of the Fulbright Specialist program to use for recruitment purposes that include descriptions of the experiences and accomplishments of individual program participants and host institutions overseas as well as the impact on the individual, U.S. home institution or organization, U.S. home community, and the foreign host community and/or country. The individual stories selected should align with U.S. Department of State public diplomacy goals, and should show the impact (including “multiplier effect” to broader sectors) of the program.
- Plan for and solicit ECA participation in all its Washington, D.C. area activities, as well as other major events, including virtual events, and annual activities such as but not limited to International Education Week, networking receptions, the annual conference of NAFSA: Association of International Educators, etc.
- Publish a public, online directory of Fulbright Specialists receiving grants in 2021-2022 by January 31, 2023. ECA uses the data in the directory as a vehicle for presenting and explaining the program in the private and public sectors, including through ECA presentations to the U.S. Congress, and demonstrating local impact with tangible benefits to American communities. The Fulbright Specialist Directory should include the name of each participant, home state, country of assignment, field (project topic), and U.S. and host institutions (as appropriate).
- Issue a request to U.S. embassies and Fulbright commissions to review and update their country-specific program webpages and ensure that they are updated with relevant information, such as deadlines, selection process information, and priority disciplines to inform recruitment activities.
- Develop and keep updated outreach and recruitment mailing and email lists for targeted recruitment efforts.
- Work in coordination with administrators of all other Fulbright Program components to provide information on the full range of Fulbright opportunities at all of the Fulbright Program recruitment events, with the guidance of ECA, in order to present a cohesive Fulbright brand.

A.2 Application, Screening, Selection, Project Funding Models and Submission, and Matching Process

The award recipient will be responsible for managing the Fulbright Specialist candidate application, screening, and selection process. A key component of the Fulbright Program is

maintaining an independent, merit-based review process. The award recipient will also be responsible for overseeing the online project proposal submission and process for matching specialists on the register to projects submitted by U.S. embassies and Fulbright commissions.

The award recipient should demonstrate its capacity and plans to support the following activities for application receipt, screening, selection, project submission, and matching:

A.2a. Application, Screening, and Selection of Fulbright Specialist Applicants/Candidates

- In consultation with ECA, develop, maintain, and publicize an online application form for the Fulbright Specialist register.
- Respond to queries by phone, electronically, or in-person from prospective applicants to the register.
- Maintain a system that allows applicants to apply to the program entirely online (including submission of references) through the Fulbright Specialist Program management system (portal).
- Conduct an annual review and assessment of the specialist candidate register, including review of relevant data, and analysis and recommendations about size, scope, and composition of the register vis-à-vis the demand from projects from the field.
- Based on the findings of the annual review, conduct special recruitment for specialist candidates with specific expertise or for unique projects in under-served or priority fields.
- Receive and screen all specialist applications submitted to the register and conduct a technical review of all applications received for eligibility and completeness. The award recipient will screen all applications for eligibility and suitability according to Chapter 600 of the [Fulbright Program Policies](https://eca.state.gov/files/bureau/board_policy_chapter_600.pdf) of the Fulbright Foreign Scholarship Board (FFSB) (https://eca.state.gov/files/bureau/board_policy_chapter_600.pdf), provide a checklist of criteria by which the applications were screened and confirm that screening has taken place at the time that slates of recommended candidates are transmitted to ECA.
- As part of the application review process, screen applicants for eligibility under FFSB Policy 626.2 (Persons Arrested for, Indicted for, Charged with, or Convicted of a Felony or a Misdemeanor; or Subject to Disciplinary Measures for Misconduct). Collect additional documentation from applicants, as necessary, and transmit to ECA/A/E for eligibility review by the FFSB.
- Propose a peer review timeline and process, including arranging a virtual review of applications by external review committees; recruiting, selecting, and training appropriate academic and professional experts to review applications; and observing ECA and program diversity objectives. A review of applicants should occur throughout the program cycle.
- Peer review committees may include, but should not be limited, to Fulbright Specialist and/or Fulbright Scholar alumni to the greatest extent possible. Reviewers should have country or regional expertise in addition to discipline expertise. ECA program officers will serve as observers and resources at the panel meetings. The award recipient should present a plan to identify diverse individuals (in terms of race, ethnicity, gender, profession, field, institutional affiliation, career experience, etc.) to serve as peer reviewers.

- ECA should receive biographical information on the panel members and logistics for these committees, as requested. All materials provided to the peer review committee should be submitted to ECA/A/E/MR for review prior to distribution to review committees.
- Provide ECA with the results of the peer review process, including data on the number of applications and recommended candidates for the specialist register after each selection cycle.

A.2b Project Funding Models and Submission

- Establish and maintain an online Fulbright Specialist project management system (portal) to manage all aspects of the program including submissions of project requests and reports; tracking of the approval and processing of requests and grants; tracking of the status and drawdown of country allocations and types of funding used; and the capacity to run various reports and searches necessary to manage the program, including tracking of project allocations, usage, and budget functions. The portal should allow for submission, processing, and approval of project requests within an eight-week period and on a rolling basis. Ensure that ECA program officers, U.S. embassies, Fulbright commissions, and host institutions have access to the online system via a username and password.
- Ensure that project management system (portal) access and virtual and/or in-person training is provided to relevant stakeholders both in the United States and overseas (ECA, U.S. embassies, Fulbright commissions, host institution staff). This must include assistance with troubleshooting system challenges.
- Create and maintain a point of contact list including stakeholders at U.S. embassies and Fulbright commissions that can be regularly updated in the project management system (portal).
- The online system should also host the Fulbright Specialist register. U.S. embassies and Fulbright commissions must be able to access the Fulbright Specialist register, track countries' annual project allocations, develop and submit specialist project proposals, match Fulbright register candidates to project proposals, and create final reports following project completion.
- Host institutions should also have access to the specialist register to develop project proposals and match candidates from the specialist register to the project through the online system. Host institutions must submit project proposals through the online system to U.S. embassies and Fulbright commissions for initial review.
- U.S. embassies and Fulbright commissions will review and edit project proposals through the online project management system and submit finalized project proposal electronically to ECA.
- The online project management system should include the following components related to the project proposals:
 - Project status: submitted, approved, denied, withdrawn/cancelled
 - ECA approval information: approval status, approving program officer, approval date, comments
 - Foreign host institution contact information
 - U.S. embassy or Fulbright commission contact information

- ECA approval, disapproval, project cancellation, and comments
 - Project proposal description: discipline, specialization, types of activities, project description, project purpose, project impact on host institution, project potential for institutional linkages
 - Project guidelines: single or multiple visit (see Section A.4-Special Projects) project information, project dates, and project length for each visit
 - Specialist applicant description: qualifications, degree, teaching experience, academic rank or professional status, foreign language requirements, audience, named or open request, justification, candidate register status
 - Cost-share and project funding model (see below): contact for all cost-share arrangements, funding notes, lodging arrangements and cost-share amount, local transportation/in-country travel arrangements and cost-share amount, meal arrangements and cost-share amount, formula to calculate total cost-share amount, cost-share provider (host or home institution, host community, U.S. embassy, Fulbright commission, etc.)
- The Fulbright Specialist Program will offer two funding models in FY 2022:
 - The traditional funding model is a cost-shared arrangement wherein ECA funds for the Fulbright Specialist award are used for air travel and daily honorarium. The in-country host (or U.S. embassy) provides cost-share for lodging arrangements, local transportation/in-country travel, meals, and sometimes additional per-diem costs. Approximately 440 projects under this funding model, with an average program cost of \$7,800 per specialist, should be anticipated for FY 2022. Using this model, projects must be identified as being included in one of three eligible project pools 1. Traditional country allocation pool (approximately 420 projects); 2. global ECA directed pool (approximately 10 projects); 3. New/non-regular country pool (approximately 10 projects)
 - The fully field-funded model is one in which the Fulbright commission or U.S. embassy identifies funding for all grant costs, issues the Fulbright Specialist grant documents, and arranges all logistics. ECA supports only the administrative arrangements under this award – the cost of recruitment and maintenance of the register, as well as submission of the project proposal, and follow-on activities. Approximately 25 projects under this funding model, with an average cost to ECA of \$0 per specialist, should be anticipated in FY 2022. The award recipient should be prepared to enter into separate agreements with U.S. Embassies and/or Fulbright commissions that have multiple fully-funded projects.
 - In consultation with ECA, the award recipient should propose way to extend programming or adjust the timing of project submissions to meet ECA priorities.

A.2c Matching

- If a host institution, U.S. embassy, or Fulbright commission does not identify a candidate from the specialist register to match to a project proposal, the project is known as an “open project.” The award recipient will search the register for a qualified and eligible candidate.

- If a host institution, U.S. embassy, or Fulbright commission identifies a candidate who is not currently on the specialist register, also called a “named project,” the award recipient must contact the individual and guide them through the specialist register application, selection, and screening process before they can be matched to a project (if approved).
- If a U.S. embassy, Fulbright commission and/or foreign host institution identifies a candidate who is on the specialist register but they have not been in direct contact with them prior to identification, this is also called a “named project,” the award recipient must contact the register candidate to advise that the candidate has been identified for a project, confirm their interest and ability to undertake the project (if approved).
- The matching system should:
 - Identify a match of one or more register candidate(s) to the project if a host institution, at the time of the initial submission of the project to the U.S. embassy, or Fulbright commission, does not identify a candidate from or recommend one to the specialist register.
 - Allow the host institution, U.S. embassy, or Fulbright commission to identify a candidate on the register to request for a project proposal.
 - Allow the host institution, U.S. embassy, or Fulbright commission to identify a candidate, not yet on the register, for a project proposal.
- The online project management system (portal) should allow ECA and the award recipient to review and edit project proposals and the Fulbright register, and run reports on all aspects of the Fulbright Specialist Program.
- The online project management system (portal) should allow Fulbright Specialists, host institutions, U.S. embassies, and Fulbright commissions to complete a final report following the completion of a project. ECA, U.S. embassies and Fulbright commissions should also have access to Fulbright Specialist, host institution, embassy and commission final reports.
- Once candidates on the register have been named to a specialist project submitted by a U.S. embassy or Fulbright commission, the award recipient must have the capacity to submit the panel electronically through the FFSB transmittal platform. Once specialist candidates are recommended by the peer review committees for the Fulbright Specialist Program, the award recipient will submit the panel to the Fulbright Foreign Scholarship Board for selection.

A.3 Post-Nomination Services

Fulbright Specialist Program applicants who are recommended through the peer review process, placed on the specialist register, and matched to a Fulbright Specialist project are considered to be nominated for further consideration by the FFSB. The Fulbright Specialist Program does not follow the traditional academic cycle of the Fulbright Scholar and Student programs. The award recipient must review candidates multiple set times per year, or on an ad hoc basis, depending on demand.

Following the nomination of Fulbright Specialist candidates through the peer review process, the award recipient will:

- Respond to queries from applicants about specialist grants after nomination and before being matched to a project.
- Prepare and send notification letters to applicants who are designated as non-selected specialist register candidates.
- Prepare and send correspondence to all Fulbright Specialist candidates approved by the peer review panel and placed on the register, informing them of their status in a timely manner.
- Prepare final selection letters for FFSB signature, after a candidate on the register has been peer reviewed and is matched and selected for a project.
- Respond to questions from Fulbright Specialists or candidates on issues related to their awards including status of placement, travel arrangements, and other pre-departure inquiries.
- Prepare and complete fact sheets and pre-departure information for Fulbright Specialists on general program guidelines, expectations, and opportunities. Work with U.S. embassies and Fulbright commissions in countries where specialists are to be placed to ensure that specialists are provided country-specific pre-departure information to be distributed electronically as requested by ECA.
- Provide information about Fulbright networks to Fulbright Specialists and encourage them to join the Fulbrighter online networking platform at <https://fulbrightnetwork.com> as well as ECA's alumni networking platform at <https://alumni.state.gov>. The information should be provided prior to departure, as these networks provide support prior to, throughout, and following their Fulbright Specialist experience.
- Carry out an assessment of the information provided by U.S. embassies and Fulbright commission to specialists prior to their departure and make recommendations to ECA based on the results of this with the goal of ensuring that specialists receive sufficient information prior to arrival for the successful implementation of their projects. This includes security information specific to the host country.
- Prepare award documents for individual Fulbright Specialists.
 - For specialist projects that are fully-funded by Fulbright commissions or host institutions, Fulbright commissions are responsible for preparing grant documents.
 - For specialist projects that are fully-funded by U.S. embassies, the award recipient will be responsible for preparing the grant documents.
- Provide ECA weekly reports that list specialists who have upcoming departures or are in the field, their project description, location of project (city, country), and personal contact details in case of emergencies.
- Distribute individual payments for project expenses and honorarium to Fulbright Specialists
 - Traditional Cost-Share Projects (host institution/in-country partner covering the in-country costs)
 - Specialists should receive ECA-funded honorarium in multiple payments, with the final payment provided after the specialist submits a final report.
 - Lodging, local transportation/in-country travel, and meals will be covered by the host institution and/or, in some circumstances, U.S. embassy or Fulbright commission
 - ECA Funded Projects

- Specialists whose in-country costs are covered by ECA must receive all funding for lodging, local transportation/in-country travel, and meals prior to their departure date for the host country.
 - Fully Field-Funded Projects
 - Specialists whose projects are fully-funded by the host institution, U.S. embassy, and/or Fulbright commission will receive the honorarium, round-trip airfare, lodging, local transportation/in-country travel, and meals from the host institution, U.S. embassy, or Fulbright commission.
- Facilitate travel arrangements through a travel agency contracted by the award recipient, not by the grantees, ensuring that the flights meet the requirements set forth by the *Fly America Act*.
- Enroll participants in ECA's Accident and Sickness Program for Exchanges (ASPE) as directed by ECA.
- Advise grantees participating in ASPE of the program policies, benefits, limitations, and procedures for filing claims.
- Utilize a system that assigns a unique ID number to each participant enrolled in ASPE or other health benefits program for the purposes of health benefits enrollment. Collect data on primary and secondary health benefits for each participant enrolled in ASPE or other health benefits plan.
- Devise and develop administrative rules for project changes, to be approved by ECA, to allow for changes to start dates, travel arrangements, adjustments to project details, and other routine project changes. These route changes should be administered with minimal need for ECA's substantial review and re-approval.
- Communicate regularly with ECA and overseas Fulbright commissions and U.S. embassies on the status of specific Fulbright Specialist Program requests.
- Process participant withdrawals from the program and notify ECA; indicate availability of other candidates or recruitment of new candidates. The award recipient will inform U.S. embassies and Fulbright commissions of any changes related to project dates and candidate availability.
- Fulbright Specialists should have clear points of contact to address any concerns or issues while on program.
- Although the U.S. embassy and the host institution will have the lead responsibility for monitoring the participant while on program, the award recipient should develop and submit a comprehensive monitoring plan for the Fulbright Specialist Program. The safety and security of U.S. citizens overseas is a top priority for the Fulbright Program. The monitoring plan should clearly indicate which staff members are responsible for the monitoring of U.S. specialists and the level of effort anticipated. In consultation with ECA/A/E, establish protocols for systematic monitoring of Fulbright Specialists through both in-person and/or virtual engagement. At a minimum, for projects of 14 days, this might occur only once during the project, but should be scaled appropriately based on the length and complexity of the project. The award recipient should communicate with program participants at the beginning and end of the grant period, and at least one additional time during the program. However, ECA welcomes the proposal of even more robust monitoring protocols. Fulbright Specialists should have clear points of contact to address any concerns or issues while on program. This plan does not supersede the role and responsibilities of Fulbright commissions and U.S. embassy Public Affairs Sections

for in-country monitoring, which are outlined in the Commission Manual and the Foreign Affairs Manual (FAM). The proposed monitoring plan should include a clear approach to ensuring timely communication about grantee issues with ECA/A/E, and commissions, and U.S. embassies.

- Assist ECA in handling crises affecting Fulbright Specialists abroad, such as medical emergencies and medical evacuations, including for mental and physical health issues; natural or human-made disasters; political or societal unrest; and the need for repatriation of remains. This includes emergency support services in the event of program suspensions and/or circumstances necessitating the repatriation of U.S. scholars from overseas.
- Require a final report from the grantee to be submitted electronically through the online project management system.
- Require short final/evaluative reports from the sponsoring U.S. embassy, Fulbright commission, and host institution, to be submitted electronically through the online project management system.
- Carry out an analysis on final reporting and provide information, both worldwide and by world region and country, on successes, challenges, and trends to ECA.
- Report out on plans used to engage with program alumni, promote and track long-term collaborative relationships between U.S. and host country institutions and report on tangible benefits that result from Fulbright Specialist projects.

A.4 Special Projects

- Multiple Visit Projects
 - Under the traditional cost-share funding model, a host institution may propose that one project be separated into multiple or separate visits, provided the combined visits do not exceed the maximum grant length of six weeks. With multiple visit projects, each visit should be counted as a separate project towards the country allocation.

A.5 Program Planning and Reporting Management

The proposal should demonstrate how mutual understanding and long-term academic and professional connections in participating countries would be developed and strengthened through the Fulbright Specialist Program. The award recipient will:

- Maintain current participant data electronically including individual grant amount; host and/or home institution cost-share; name of U.S. embassy or Fulbright commission; and the fiscal year of funding. Required data fields for the electronic data system include, but are not limited to the following: first name; middle name; last name; gender; date of birth; race; country of citizenship; country of program; country of residence; participant type; project field/topic; home institution; host institution or affiliation; Fulbright Program category; fiscal year of funding; award amount; home/host U.S. state; and Congressional district. Ensure data is accurate prior to submitting to ECA for inclusion in U.S. Department of State statistical reports.

- Ensure the completion of participant and host institution final reports and provide both individual reports, and analysis and trends to ECA for review.
- Ensure that the Fulbright Specialist system allows specialists, host institutions, U.S. embassies, and Fulbright commissions to complete a final report following the completion of a project. ECA, U.S. embassy and Fulbright commission must have access to specialist, host institution, U.S. embassy, and commission final reports.
- Provide a semi-annual report on the Fulbright Specialist Program, including statistical data as well as highlights of outstanding participants. Consult with ECA to determine the requirements of the Academic Exchanges Information System (AEIS) database. These reports may include, but are not limited to, the following:
 - Data on host institutions' multiple use of special projects
 - Data on return visits by requested scholars
 - Data on the origination of specialist program requests
 - Data on cost-share by country
- Discuss an evaluation plan and methodology to collect, analyze, and report on impact data from the Fulbright Specialist Program alumni three years from the end date of the Fulbright awards.
- Provide a note taker at annual planning meetings related to overall improvements in program administration, outreach, follow-on, evaluation, etc. Notes should be shared with ECA and should outline any agreed upon action in a timely manner.
- Submit all required reports. (See section on “Program Reporting” under “Program Specific Guidelines” for guidance on required statistical and final reports.)

A.6 General Program Responsibilities

The award recipient will:

- Provide ECA with an organizational staff chart and provide an updated version of the staff chart on a semi-annual basis.
- Prepare and submit data to the award recipient of the Fulbright Student Program for the successful production of the joint annual report (JAR) for the 2021-2022 Fulbright Specialist activities. The JAR provides comprehensive program statistics and information and is integral to ECA reporting.
- Develop protocols for the collection, use, maintenance, and dissemination of personally identifiable information (PII), ensuring that the personal information of Fulbright Specialist applicants, candidates, and grantees is appropriately protected. Protocols should be applied to data submitted for the ECA Annual Statistical Exercise, as well as any PII being transmitted between the cooperating agency and ECA. Additionally, ECA encourages its cooperating partners to establish internal protocols, ensuring appropriate collection, use, maintenance, and dissemination of PII. Where applicable, ensure these practices fall within parameters required by *European Union's General Directive on Protection Regulations (GDPR)*.
- Prepare standard report forms for use by all grantees and ensure that reports are completed and made available to ECA program staff on a timely basis. Program reports should be selectively distributed to new participants to inform and prepare them for their

assignments. Material from the reports should be used to highlight significant accomplishments in publicity and promotional materials about the program.

- In accordance with Federal, Department of State, and Fulbright Program policy and practice, and in close consultation with ECA/A/E, work with participants with disabilities, on a case by case basis, to assess the need for reasonable accommodations and to provide support for program participation.
- Offer regular virtual and in-person training, toolkits, handbooks, resources, and other support to U.S. embassy, Fulbright commission, and host institution staff, as requested by ECA. The award recipient must regularly update such resources and must submit drafts to ECA for approval prior to publication.
- Populate the Fulbright Program digital asset management system (the Fulbright Source). ECA relies on its award recipients to fully integrate the Fulbright Source into all recruitment, outreach, and communications initiatives. The Fulbright Source is designed to provide ECA with the capability to track the impact and success stories of the Fulbright Program worldwide, as well as to give program staff around the world the ability to access and share photos, videos, and other program resources such as informational flyers, press kits, logo files, and annual reports. The Fulbright Source should be utilized for print and electronic outreach, recruitment, and reporting. The award recipient should be prepared to provide the staffing resources necessary to collect, upload, tag, and curate accurate and relevant digital assets for the Fulbright Source, and coordinate with ECA/A/E Outreach staff and relevant program office staff regarding system content and protocols. The award recipient should encourage Fulbright commissions, U.S. embassies, grantees, alumni, etc. to utilize the system as a repository for country and program- or activity-specific impact data as well as outreach, recruitment, and reporting.

A.7 Outreach and Marketing

In addition to targeted recruitment for U.S. academics and professionals as discussed above, the award recipient will develop, and submit as part of its proposal, an outreach and marketing plan designed to raise general awareness of the Fulbright Specialist Program and to demonstrate inclusiveness, innovations, and impact on U.S. participants, campuses and communities, as well as international impact. Special attention should be given to the impact Fulbright Specialists have on American communities and institutions when they return to the United States. The outreach and marketing plan should be designed in concert with recruitment planning, but should focus on informing a more general audience in the United States about the sponsorship, purpose, significance, effectiveness, impact, value and relevance of the Fulbright Specialist Program, especially to U.S. participants and home institutions/employers. Any marketing materials for the campaign must be designed using ECA and Fulbright brand guidelines. Abroad, U.S. embassies and Fulbright commissions are primarily responsible for publicizing the Fulbright Specialist Program to potential host institutions, but the award recipient will develop a suite of tools for their use, which should include selected materials in formats that can be edited and translated into local languages by partners who work on the program in countries in which the language is relevant.

The award recipient will:

- In coordination with ECA, develop general information language to include in recruitment and outreach brochures, announcements, and other materials to demonstrate the impact of the Fulbright Specialist Program in the United States and abroad, including beyond the individual exchange.
- Maintain and update a general information website where the Fulbright Specialist Program is described. The website content should be dynamic and must emphasize the accomplishments, experiences, impact, and diversity of current and past program participants, as well as promote details of projects that reflect ECA priorities or fields that are underrepresented on the register and of strategic importance to ECA for special recruitment. The award recipient must regularly check the website content to ensure that all posted material is current and correct, and must submit any proposed new online initiatives or major revisions of current online materials to ECA for approval prior to development. ECA also reserves the right to request that website content be added or removed in a timely manner.
- Propose plans for collecting, analyzing, reporting, and presenting impact data from Fulbright Specialists and alumni. Special emphasis should be given to data visualization, including infographics. Impact should be focused on the individual specialist and their U.S. institution, the wider U.S. community, and the foreign host institution and community.
- As noted in Section A.1 Recruitment, utilize social media assets primarily as a tool to disseminate information on the impact of the specialist program to general audiences. This will include participant profiles, testimonials, and infographics and data visualization. Social media assets may also be used for specific recruitment messages as warranted, especially to target underserved populations of specialist applicants and host institutions.
- Applicants to this funding opportunity should submit a plan to develop its social media plan and implementation strategy, in consultation with ECA/A/E and with the administrators of the Fulbright Student and Scholar Programs to contribute Fulbright Specialist Program-specific content to official Fulbright Program social media assets.
- Propose a plan to feature diverse alumni and diverse projects when designing and implementing outreach and marketing strategies, including website and social media efforts, to demonstrate the Program's Diversity/Inclusion interests.
- Widely advertise and promote ECA's Fulbright Program website (<https://eca.state.gov/Fulbright>) and provide draft material, when requested by ECA, for ECA's Fulbright Program website and all of its components.
- Utilize social media assets in coordination with U.S. embassies and Fulbright commissions to provide updates on Fulbright Specialists' visits while they are in their host country.
- Suggest activities that would contribute to the celebration of the Fulbright 75th Anniversary in the remaining months of calendar year 2021. Activities may be in-person and/or virtual and should involve program participants and alumni, home and host institutions, and other program stakeholders.

Publications, program materials, the Fulbright Specialist Program website and all other online platforms, including social media profiles, should explain the mission of the Fulbright Program

and its binational character, and highlight the U.S. government and the U.S. Department of State's role as the program's sponsor and manager. As such, all materials should note that "The Fulbright Program, sponsored by the U.S. Department of State's Bureau of Educational and Cultural Affairs, is the U.S. government's flagship international educational exchange program and is supported by the people of the United States and partner countries around the world. For more information, visit <https://eca.state.gov/fulbright>." This language should appear prominently on all print and electronic materials and should precede any language regarding the role of the cooperating partner in administering the program. Publications should prominently feature the U.S. flag, the U.S. Department of State seal, and the Fulbright logo, in accordance with established guidelines outlined in <https://app.box.com/s/jugk81ys4n1pdr64bpazvmjqewms3gv5>. The publicity strategy and all publication materials such as brochures, including cover designs, must be submitted to ECA/A/E Outreach staff for approval prior to publication and dissemination.

All print and online materials provided to applicants, candidates, specialists, campus contacts, U.S. embassies and Fulbright commissions, host institutions, and peer review committees should be submitted for the ECA/A/E Outreach staff review before distribution. Prior to ECA review, all print and online materials should be carefully edited and revised to meet standards commensurate with the prestige and academic character of the Fulbright Specialist Program.

Any communication with U.S. embassies and/or Fulbright commissions involving major new initiatives or policy revisions should be cleared by the ECA/A/E/MR before dissemination.

A.8 Fiscal Management

The award recipient will:

- Manage, prepare, and disburse individual grant payments for all Fulbright Specialist grantees as appropriate.
- Audit internal functions, systems, and controls as necessary.
- Administer memorandums of understanding (MOUs) and/or other agreements with cost-share partners in support of the Fulbright Specialist Program. As requested by ECA, provide status updates, financial reports, etc. regarding these funding relationships.

See Section II, Program Reporting, for additional guidelines on fiscal reporting requirements.

A.9 Follow-on

The award recipient should develop suggestions for possible follow-on activities for program participants to ensure that ECA-supported programs are not isolated events. This may include, but is not limited to alumni presentations, seminars, or workshops for the Department of State, the FFSSB, academic or professional institutions or organizations, or other relevant stakeholders; reporting/publications that could be utilized for information sharing or promotional purposes; mini-grants; developing linkages and cooperative activities between grantees' home and host

institutions/organizations, or other activities that support the goals of the Fulbright Specialist program that may be proposed by the recipient or by ECA.

The award recipient should engage with program alumni, promote and track long-term collaborative relationships between U.S. and host country institutions, and report on tangible benefits that result from specialist projects.

ECA INVOLVEMENT

In a cooperative agreement, ECA is substantially involved in program activities beyond routine monitoring. In this agreement, ECA will be responsible for the following:

1. Participating in and approving the design and direction of all program activities;
2. Approving key personnel;
3. Approving and providing input on program timelines, agendas and administrative procedures;
4. Providing guidance in execution of all program components, in particular execution of program policy and guidelines;
5. Reviewing and approving all program recruitment, publicity, and outreach materials, which are to be created;
6. Reviewing and approving projects and participating Fulbright Specialists, in cooperation with U.S. embassies and Fulbright commissions, subject to final selection by the FFBSB;
7. Approving significant changes in the scope of Fulbright Specialists' specific projects;
8. Approving decisions related to special circumstances or problems through the duration of the program;
9. Providing guidance and assisting with participant emergencies and medical evacuations;
10. Liaising with relevant U.S. embassy, Fulbright commissions, and other program stakeholders, including Department of State personnel; and
11. Responding to media inquiries and communicating with the press.

II. PROGRAM SPECIFIC GUIDELINES

STAFFING AND KEY PERSONNEL:

The proposal and staffing pattern should outline key personnel clearly. Under the Fulbright Specialist Program, key personnel will include responsible signatories on the award as well as senior staff responsible for program oversight and implementation. Other key personnel may be identified during award negotiations and/or the period of performance. Please include the job description and resume for key personnel in the proposal submission. ECA/A/E reserves the right to review and approve the roles and responsibilities of these positions prior to future advertisement and subsequent hiring by the award recipient.

ECA requests that the award recipient organization(s) present administrative unit costs that accurately reflect the level of effort. This is increasingly important as direct cost-share agreements between award recipients and partner countries are increasingly common across the

larger Fulbright Program. The award recipient should also provide a semi-annual staffing pattern to ECA/A/E; this should include office location and detail roles and responsibilities making clear the volume of work per employee. The staffing pattern should not include interns and assistants. Semi-annual staffing patterns need only include level of effort should there be a change from the initial staffing pattern included in the proposal.

PROGRAM REPORTING

Program Reporting:

The award recipient must contribute program data and narrative text to a joint annual report (JAR) in collaboration with the administrators of other Fulbright Program components, so that the JAR is submitted to ECA by November 30, 2022.

The award recipient must prepare and submit to ECA by November 30, 2022, an annual report of the 2021-2022 Fulbright Specialist activity containing comprehensive program statistics and information, to be determined in consultation with the Office of Academic Exchange Programs.

Financial reports:

The award recipient shall provide detailed financial reports for the Fulbright Specialist Program, organized by the world region and country. Individual projects should be listed, including the fiscal year of the project start date. These reports should capture the amount of programmatic funds, total paid expenditures, current balance, unpaid commitments, projected balance, and cost-share amounts. Reports are due after the end of the fiscal quarter.

Other reports: The award recipient should provide weekly reports on Fulbright Specialists currently on the program. On request, prepare summary reports on the Fulbright Specialist register applicant pool (number of applications, trends, disciplines, and quality), projects, projected costs, statistics, or expenditures, as necessary. Upon request, the cooperating organization will provide detailed reports to ECA on actual cost-share from U.S. home institutions, overseas host institutions, Fulbright commissions, and U.S. embassies, and monitor trends in institutional cost-share and other conditions affecting the Fulbright Specialist Program.

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)

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 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 benefitting 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 30 double-spaced, single-sided pages, provide a detailed description of the project addressing the areas listed below. Additional information may be submitted in the appendices.

1. Vision (statement of need, objectives, goals, benefits)
2. Participating Organizations
3. Program Activities (publicity, advertisement, recruitment and screening, selection, affiliation, orientation, academic component, cultural program, participant monitoring and support services)
4. Program Evaluation
5. Follow-on
6. Project Management
7. Work Plan/Time Frame

Additional Information to be Submitted

Detailed Budget

Applicants should pay careful attention to the below detailed budget instructions. Narrative proposals should be reviewed on the applicant's capacity and ability to complete all of the above program components; however, all of those program components are not included in the below request for a detailed budget. The applicant's budget proposal will be reviewed for adherence to the below guidelines.

1. General Considerations

The Total FY 2022 funding request should not exceed \$4,500,000, pending the availability of FY 2022 funds.

The Bureau anticipates the following scholar caseload in FY 2022:

U.S. Fulbright Specialist Total: 465

Funding for projects will fall under two project funding models:

1. Traditional funding model (cost-shared arrangement) (approximately 440 projects, including approximately 420 traditional country allocation pool, approximately 10 global ECA-directed pool, and approximately 10 new/non-regular country pool)
2. Fully-field-funded model (approximately 25 projects)

For additional detail about these funding models and average costs for the funding models, See A.2b. Project Funding Models and Submission.

Applicants should submit separate administrative and programmatic budget proposals. Applicants should also submit a summary page reflecting budget requests for all programs.

Submit a line item budget in a three-column format is indicated below:

Column 1	FY 2022 Bureau funds request
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Column 2	Amount of Cost Sharing in FY 2022
Column 3	Total FY 2022 Budget (Total of columns 2 and 3)

Program Costs:

A) participant costs, may include (but must not exceed the rates prescribed by federal travel regulations):

- Round-trip international and domestic airfare
- Visa fees
- Ground transportation
- Other transit costs
- Housing accommodations
- Honorarium (approximately \$200 per day per participant)
- Meals and incidentals additional costs associated with normal administration of exchange programs
- Costs associated with ensuring individuals with disabilities or medical conditions are supported at a level that allows for a successful experience

B) additional costs associated with normal administration of exchange programs

C) special project-related costs, as approved by ECA (examples may include project related additional baggage and procurement of materials)

Administrative Costs:

- Staff salaries, benefits, and support services for the program (fringe benefits should be stated separately from salary costs);
- Space rental requirements: office rent, furniture, and equipment
- Communications, printing, and publishing, and office supplies used for the program
- Program-related staff travel (may not be required); round trip domestic and/or international airfare, visas, ground transportation, transit costs, and per diem (all per diem must not exceed the rate prescribed by federal travel regulations)
- Other fees associated with the normal administration of exchange programs, including but not limited to Recruitment; Application, Screening and Selection; Project Funding Models and Submission, and Matching Process; Post-Nomination Services; Special Projects; Program Planning and Reporting Management; General Program Responsibilities; Outreach and Marketing; Fiscal Management; and Follow-on

2. Budget Guidelines

The proposal must include a comprehensive line-item budget, the details and format of which are contained in the PSI. In addition, the proposal must include a comprehensive budget narrative demonstrating how all costs were derived. As with other exchange programs, ECA is committed to containment of costs consistent with overall program objectives and sound management. ECA reserves the right to reduce, revise or increase the proposal budget and participant numbers in accordance with funding availability and the needs of the program.

The proposed budget should include the following sections:

- 1) Summary Budget: broken into Administrative and Program Cost Sections
- 2) Administrative Costs

3) Program Costs

Each budget section should consist of three column format described in detail described in detail by PSI.

Cost-sharing should be distinguished as follows: Applicant's cost-share, other organizations' cost sharing (specify the name of the organization and the amount of cost sharing provided).

A staff list should be provided and ECA must be kept fully and currently informed regarding the hiring of consultants on the program. Any consultants over and above administrative consultants (IT assistance, etc.), should be disclosed to ECA at the time of hiring of services.

- Calendar of activities/itinerary
- Letters of endorsement
- Resumes and CVs (resumes for all key personnel should be included in the submission; no resume should exceed 2 pages)
- First Time Applicant Attachments, if applicable.

FOR INFORMATIONAL PURPOSES ONLY:

ADHERENCE TO ALL REGULATIONS GOVERNING THE J VISA

The Bureau of Educational and Cultural Affairs places critically important emphasis on the security and proper administration of the Exchange Visitor (J visa) Programs and adherence by award recipients and sponsors to all regulations governing the J visa. 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 Designation, Private Sector Programs Division
 U.S. Department of State
 SA-4E (Bldg. 3)
 2430 E Street, NW
 Washington, DC 20037

Please refer to the Solicitation Package for further information.

APPLICATION SUBMISSION

The NOFO indicates the date the complete proposal is due and the manner in which proposals must be submitted. There are NO EXCEPTIONS to the deadline. For further information regarding this program, contact Cecilia Kocinski-Mulder at Kocinski-MulderCP@state.gov or (202) 655-1611 or Vincent Pickett at PickettVS@state.gov or (703) 625-7670.

(end)

