

## **PROJECT OBJECTIVES, GOALS, AND IMPLEMENTATION (POGI)**

### **FY 2022 Fulbright Scholar Program**

**Funding Opportunity Number: SFOP0007707**

**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 Scholar Program. 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 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 solicitation, the solicitation 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 a U.S. public or private non-profit organization meeting the provisions of a 501(c) 3 to administer the FY 2022 Fulbright Scholar Program. The Fulbright U.S. and Visiting Scholar Programs annually provide approximately 958 awards to U.S. scholars and professionals to lecture and/or conduct research abroad and approximately 1,037 awards to visiting (non-U.S.) scholars to lecture and/or conduct research in the United States. In addition to providing administrative services for the core U.S. and visiting scholar programs, the cooperating organization will be responsible for administering several related Fulbright Scholar Program components and activities, including, but not limited to, the Fulbright Public Policy Fellowship, Fulbright Global Scholars Program, Fulbright Scholar-in-Residence Program (S-I-R), International Education Administrator Seminars (IEA), Fulbright Outreach Lecturing Fund (OLF), and topic-based research initiatives such as the Fulbright Arctic Initiative. An abridged calendar of program activities is included below in subsection I.

Projected participant numbers for each of these programs are included in the chart below. ECA reserves the right to reduce, revise, or increase funding amounts and participant numbers, pending the availability of funds, the needs of the program, and U.S. Department of State foreign policy priorities. Should the Fulbright Scholar Program be awarded for FY 2022 to an organization that does not currently administer the Program, the new organization and the current administrator of the Fulbright Scholar Program will be required to collaborate closely to ensure a successful transition.

<b>FY 2022 Fulbright Scholar Program Component</b>	<b>U.S. Scholars</b>	<b>Visiting Scholars</b>	<b>Total Scholars</b>
<b>Core One or Two Semester Awards</b>	866	952	<b>1,818</b>
<b>Fulbright Public Policy Fellowship</b>	12	0	<b>12</b>
<b>Fulbright Global Scholars Program</b>	25	0	<b>25</b>
<b>Scholar-in-Residence Program</b>	0	30	<b>30</b>
<b>International Education Administrators Seminars</b>	50	40	<b>90</b>
<b>Fulbright Arctic Initiative or Special Regional Program</b>	5	15	<b>20</b>

The proposal should demonstrate a clear understanding of current trends in U.S. higher education and knowledge of higher education conditions in other countries, including those traditionally underrepresented in academic exchange.

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. scholars, and affiliation, monitoring and support services, orientation, and enrichment programming for visiting scholars. When appropriate, proposals should discuss areas of possible impact on program operations and provide alternatives to normal program operations to mitigate further program disruption. As relevant, proposals should present options for virtual and/or hybrid (mix of virtual and in-person) activities to augment in-person engagement with all program stakeholders.

#### **A. U.S. Scholar Program**

The Fulbright U.S. Scholar Program provides awards to approximately 958 U.S. Scholars to travel to more than 150 partner countries to conduct advanced research and teaching at institutions abroad. For the core U.S. scholar program, programs range in duration from one semester to a full academic year. Responsibilities of the award recipient for the Fulbright U.S. Scholar Program include:

## A.1 Recruitment of Applicants

The award recipient will prepare a creative and comprehensive plan for recruitment of U.S. scholar applicants for all grant opportunities.

The recruitment plan should make clear the primary purpose and audience for key messages, making sure to differentiate between recruitment needs and general program marketing and promotion. A separate outreach and marketing plan for general marketing and promotion is requested later in this POGI and should include the use of multiple communications platforms and social media assets as a vehicle to share the impact and value of the program, rather than as a tool for direct recruitment. A successful recruitment plan will provide specific strategies for 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 current diversity priorities of the Fulbright Program, including national representation (urban/suburban/rural) and the inclusion of the various religious, political, and cultural backgrounds and viewpoints found in the United States. Applicants should include targeted recruitment efforts to attract qualified individuals from traditionally underrepresented populations, including, but not limited to racial and ethnic minorities, applicants with disabilities, veterans, applicants from different categories of higher education institutions (based on Carnegie classifications), including community colleges, applicants from minority serving institutions (MSIs), and applicants from diverse academic fields. The recruitment plan should also include strategies for recruiting on a country/program and award-level basis.

The recruitment plan is subject to ECA/A/E's approval and should be carried out in ongoing coordination with ECA/A/E, following all relevant Fulbright branding guidance and ECA communications requirements.

ECA's sponsorship, management, and oversight of the Fulbright Program must be emphasized in all recruitment activities and the <http://eca.state.gov/fulbright> website should be given as the primary source for general program information.

A competitive proposal will include a robust recruitment plan, which should include the following:

- A comprehensive plan to attract qualified U.S. scholars, including early career academics (those receiving doctoral degrees within the past five years).
- A separate plan focused on the recruitment of applicants outside academia (such as attorneys, artists, journalists, and business professionals), including the targeted recruitment of applicants in public policy fields.
- Strategic approaches to attract and engage faculty and administrators from community colleges, minority-serving institutions (MSIs), and institutions traditionally underrepresented in the program across the United States (rural institutions, service academies, agricultural and technical schools, etc.).
- Proposed recruitment materials and activities, including, but not limited to, print and online content, social media assets, videos, conferences and campus visits, and other in-person or virtual outreach

activities and events. Print and electronic recruitment and outreach publications may include targeted advertisements, flyers, one-pagers, brochures, and infographics, etc.

- A strategy for utilizing virtual recruitment tools, including videoconferences, and a roadmap for implementing a series of high-quality and engaging general information and program-specific webinars for potential applicants.
- Detailed plans for undertaking recruitment in specific disciplines and for specific countries and awards within countries. This should include ideas for coordinating with Fulbright commissions and U.S. embassies involved in recruitment and outreach for the Fulbright U.S. Scholar Program.
- A targeted approach for engaging Fulbright U.S. Scholar Program alumni to assist in recruitment initiatives and activities for new applicants, and to provide these alumni with preparatory training to ensure successful participation.
- A strategy for the development of and innovative uses for a Fulbright U.S. Scholar Program website, as well as other relevant digital platforms, especially social media, for both specific and general recruitment.
- Proposals for potential partnerships with academic, non-profit, and private sector organizations to reach new and underrepresented audiences for the Fulbright U.S. Scholar Program.
- Proposed staff participation, including virtual participation as well as travel to U.S. campuses and relevant conferences for presentations, recruitment, and networking with program alumni and administrators with a goal of increasing participation in the program.
- A plan for media relations and engagement which includes a communications strategy to successfully pitch stories and articles highlighting the program's impact, prominent alumni, and award opportunities to publications at various levels, including but not limited to campus, local media, national higher education and traditional media.
- A plan for successful collaboration, including recruitment synergies, with other ECA programs that the award recipient administers, and/or with the U.S.-based cooperating partners that administer the Fulbright Student Program and the Fulbright Specialist Program.
- Suggested activities that would contribute to the celebration of the Fulbright 75<sup>th</sup> 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.
- Additional recruitment activities not listed above are encouraged and should be outlined in the proposal.

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

- Develop a strategic approach to U.S. scholar outreach, including targeted engagement with U.S. higher education leadership to increase support of, and participation in, the Fulbright Program. This includes ongoing review and analysis of all aspects of the U.S. scholar program model to ensure that the program is responsive to the needs of U.S. scholars and higher education institutions.
- Submit a plan to ensure that a well-developed network of U.S. campus contacts for the Fulbright Scholar Program is appropriately identified, trained, and informed to act as program representatives at their respective institutions and are empowered to play a robust role in local recruitment and program promotional efforts. Due to the need for local recruitment at U.S. colleges and universities nationwide,

the award recipient must identify representatives at a broad range of institutions, particularly at MSIs and community colleges. The award recipient should maintain a list of all Fulbright campus contacts accessible to ECA/A/E staff and other Fulbright Program partners. Campus representatives are expected to share information about all Fulbright Program components, including the Fulbright Specialist Program and Fulbright Student Program, on their respective campuses.

- Work with appropriate diversity-focused educational, professional, and academic newsletters, journals and online publications to promote the Fulbright Scholar Program and award opportunities for Scholars.
- Assist scholar program alumni in highlighting their Fulbright alumni status, and encourage alumni to identify themselves as Fulbright alumni and 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.
- Provide participants and alumni with information about Fulbright alumni networks, especially the *Fulbrighter* online network and the Fulbright Association, and encourage them to participate and share their alumni stories, which may be used for recruitment purposes.
- Plan and implement regional and institution-specific recruitment workshops, both in-person and virtual, for administrators and faculty from targeted campuses. This should include workshops serving underrepresented audiences, such as HBCUs, MSIs, and community colleges, as well as other institutions serving diverse audiences in selected locations across the United States in conjunction with MSI organization/association conferences. Institution-specific activities should identify innovative methods for engaging faculty and administrators on campus.
- Plan and implement regional or organization-specific workshops (or other recruitment events) for professionals outside of academia.
- Provide ECA/A/E with a list of proposed recruitment workshops and information on conferences and meetings where award recipient staff will make presentations. Information about specific events should include diversity-focused conferences and meetings and be provided to ECA at least four months prior to each event.
- Plan for and solicit ECA participation in all its virtual activities and Washington, D.C.-area recruitment activities, as well as other major events. Information about specific events, including drafts of schedules and outlines of proposed presentations, should be provided to ECA at least three months prior to each event.
- Publish a public, online directory of Fulbright U.S. Scholars receiving awards each year. The Fulbright U.S. Scholar Directory should include the name of each participant, home state, country of assignment, field (research/lecturing topic), and U.S. and host institutions (as appropriate).

- Issue an annual request to U.S. embassies and Fulbright commissions to review and update U.S. scholar award opportunities using an online editing platform, in close coordination with ECA/A/E. The award recipient should then incorporate the submitted updates for publication on the Fulbright Scholar Program website no later than February 2022. This listing should contain details regarding opportunities for Fulbright U.S. Scholar awards for academic year 2023-2024, and include various indices for U.S. applicants to search for suitable awards.
- Develop and keep updated outreach and recruitment mailing and email lists. In addition, develop a comprehensive list of publications by regional academic associations, professional organization, the private sector, and specialized groups, and assess their applicability as appropriate outlets for targeted Fulbright recruitment.
- Design and implement recruitment materials and activities including, but not limited to, print and online content, videos, conferences and campus visits, and other virtual and in-person events. Recruitment materials should include descriptions of the experiences and accomplishments of individual program participants, host campuses, impact on the host community and/or country, and alignment with program goals. Individuals and institutions featured in recruitment materials and activities should align with the U.S. Department of State’s public diplomacy goals, and should, whenever possible, show the impact of the program, especially on U.S. institutions and communities including those serving diverse audiences.
- Utilize public or subscription-based database(s) of academic research and scholarship for targeted recruitment of U.S. scholars, and provide access and training for Fulbright commission staff on the use of the database(s).
- Propose appropriate staffing levels and structure to effectively implement all proposed recruitment activities and initiatives.
- Provide information on the Fulbright Student Programs at all of the award recipient’s recruitment events and opportunities.
- Manage social media assets specific to the Fulbright U.S. Scholar Program; ensuring that social media assets are used both as a recruiting tool and to broaden the impact of the program. This will include participant profiles, specific recruitment messages, and infographics and data visualization.

## **A.2 Application, Screening, and Independent Selection Process**

Maintaining an effective, merit-based selection process is a key requirement for the success of the Fulbright U.S. Scholar Program. The award recipient will be responsible for managing the application submission, technical review, and screening and selection process.

Applicants should demonstrate organizational capacity and plans to support the following activities for application submission, screening, and selection:

- In consultation with ECA/A/E, develop, maintain, and publicize an online application form for Fulbright U.S. Scholar awards.
- Respond to queries by phone, electronically, or in person from potential applicants to the program.
- Receive and screen all applications submitted to the program and conduct a technical review of all applications received for eligibility and completeness, based on Chapter 600 of the Fulbright Foreign Scholarship Board (FFSB) Policies ([http://eca.state.gov/files/bureau/board\\_policy\\_chapter\\_600.pdf](http://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 when slates of recommended candidates are transmitted to ECA/A/E.
- Assess the need for screening of U.S. scholar applications for plagiarism and, if necessary, make recommendations to ECA/A/E on potential use of screening software for this purpose.
- 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 review of applications by external review committees; recruiting, selecting, and training appropriate academic and professional experts to review applications; and observing program diversity objectives. Peer review committees should include, but not be limited to, Fulbright U.S. Scholar alumni and representatives from diverse populations. Reviewers should have country or regional experience in addition to discipline expertise. ECA/A/E staff will serve as observers and resources at the panel meetings, in order to offer program background and context to committee members when relevant. The award recipient must provide ECA/A/E with biographical information on the panel members and logistics for these committees three to four weeks prior to the meetings (or at the same time that review committees receive their application materials).
- The proposal for peer review may include an approach to convening external review committees that allows for up to half of the committees to convene virtually, while still providing for real-time discussion of scholar applications. Possible factors for determining in-person versus virtual panel review may include the following: academic discipline, number of applications, availability or location of reviewers, etc. This “hybrid” approach must include ECA/A/E staff as observers and ensure that ECA/A/E staff receive all panel review materials as outlined in the bullet above.
- In December 2021, provide ECA/A/E with the results of the peer review process, including data on the number of applications and recommended candidates for all U.S. scholar awards, by country and world region.
- Submit the applications of candidates recommended by the peer review committees to U.S. embassies

and Fulbright commissions through an electronic system for in-country review and track responses in a timely manner.

- Assist in arranging post-peer review videoconferencing between commissions/U.S. embassies and U.S. scholar candidates, as requested.
- Submit the applications of candidates to ECA/A/E for transmittal to the Fulbright Foreign Scholarship Board for final selection. Working with the administrators of other Fulbright Programs, maintain and update the online transmittal system by which applicant data is transmitted to ECA and the FFSB for all Fulbright Student and Scholar Programs.

### **A.3 Post–Nomination Services**

Fulbright U.S. Scholar Program applicants who are recommended through the peer review process are nominated for further consideration by the FFSB and binational Fulbright commissions or U.S. embassies overseas. In FY 2022, the award recipient’s selection responsibilities will begin with post-nomination services for U.S. scholars who have been recommended and nominated for further consideration prior to final selection by the FFSB.

Following the nomination of Fulbright U.S. Scholar candidates through the peer review process, the award recipient will:

- Respond to queries from candidates about awards after nomination and before final selection decisions.
- Prepare and send notification letters to applicants who are not selected for awards (non-select letters).
- Prepare and send correspondence to all selected and alternate Fulbright U.S. Scholars, informing them of their status in a timely manner. This includes notification of final FFSB selection.
- Process participant withdrawals from the program and notify ECA/A/E; indicate availability of alternates. Ensure that Fulbright commissions and U.S. embassies are promptly informed of any changes.
- Provide pre-departure advice and information to all participants. Prepare and distribute country-specific information that has been cleared by appropriate ECA/A/E staff.
- Provide an electronic system to collect, review, and track participant medical clearance forms, in consultation with ECA and other Fulbright Program partners worldwide. Ensure that the system facilitates the medical clearance process for selected participants while safeguarding personally identifiable information (PII). Contract with a qualified physician for review of medical forms and suggest methods for establishing a pool of qualified medical professionals as future resources. Systematize a method for pre-notifying ECA when there is a conditional medical clearance to ensure

that the nominee, Fulbright commission, and/or U.S. embassy address concerns prior to host affiliation and arrival in country.

- Prepare grant terms and conditions documents for Fulbright U.S. Scholars going to countries without Fulbright commissions and certain Fulbright commission-countries, as directed by ECA/A/E.
- Respond to questions from Fulbright U.S. Scholars on issues related to their awards, including status of affiliation, stipend levels, dependent allowances and schooling, and housing allowances.
- Advise participants on regulations regarding use of U.S. airline carriers for U.S. government-funded travel. The award recipient should ensure that relevant travel adheres to regulations of the “Fly America Act.”
- Enroll participants going to countries without Fulbright commissions in ECA’s health benefits program, Accident and Sickness Program for Exchanges (ASPE) and/or other health benefits plan as directed by ECA.
- Advise grantees participating in ASPE of program policies, benefits, limitations, and procedures for filing claims.
- Develop and submit a comprehensive monitoring plan for the Fulbright U.S. Scholar Program, including specific approaches to monitoring scholars on special programs, such as the Global Scholars or the Fulbright Public Policy Fellowship 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. Scholars and the level of effort anticipated. In consultation with ECA/A/E, establish protocols for systematic monitoring of Fulbright U.S. Scholars through both in-person and/or virtual engagement. At a minimum, 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 U.S. Scholars 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 communication about grantee issues with ECA/A/E, and Fulbright commissions, and U.S. embassies.
- Assist ECA in handling crises affecting U.S. participants abroad, such as medical emergencies and medical evacuations, including mental and physical health issues; natural disasters; political or societal unrest; and 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.

- 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.

#### **A.4 Pre-Departure Orientation Programs (PDO)**

The Fulbright Scholar Program award recipient is responsible for managing logistics for all components of the in-person and virtual pre-departure orientation programs for participants of the Fulbright U.S. Scholar Program, as well as for participants of the Fulbright U.S. Student Program, including the Fulbright-National Geographic Fellowship Programs and the Fulbright-Fogarty Fellowships in Public Health. In coordination with ECA/A/E and Fulbright Student Program award recipient staff, the Fulbright Scholar Program award recipient will:

- In consultation with ECA/A/E, plan and administer up to eight interactive, multiple format, two- to three-day PDO programs. Orientation size will vary depending on the number of grantees for each component of the program. Orientations for Fulbright U.S. Scholar and Fulbright U.S. Student Programs should include separate sessions for the Fulbright English Teaching Assistant Program, focusing on teaching techniques and classroom management.
- In consultation with ECA/A/E, create an overall timeline for all PDO programs, including planning dates and deadlines. If deviating from those timelines, notify ECA/A/E immediately and provide a summary of implications related to any delay.
- Produce a plan to utilize U.S. embassy staff and program alumni to provide insight, support, and guidance to participants, though in-person or virtual participation and mentorship. Also, provide participants with alumni-specific resources, like the *Fulbrighter* networking platform, and encourage their use in preparation for departure.
- Conduct a competition to solicit proposals from eligible organizations, including higher education institutions or other qualified organizations to organize PDO events and content. Manage the RFP process and selection of hosting institutions in collaboration with ECA. Identify PDO venues according to participant numbers, dates and other parameters set by ECA/A/E, negotiate cost-effective contracts for venues and services as needed, and coordinate with selected venues on PDO logistics as required. The award recipient should not sign any contracts with selected implementing organizations until receipt of approval from ECA/A/E.
- Develop and maintain a Pre-Departure Resources web platform to provide orientation information and country specific materials and fact sheets.
- Work with ECA/A/E to develop and implement an outreach or media strategy to publicize PDO programs and Fulbright grantees attending the programs.

- For all PDO program activities, provide staffing plans to ECA no less than two weeks in advance of each event.
- Distribute meal and incidental expenses (M&IE) and honorarium payments to PDO attendees, including Fulbright grantees, invited alumni, speakers, and facilitators to cover their expenses at the PDO.

## **A.5 Program Planning and Reporting Management**

The applicant's proposal should demonstrate how mutual understanding, lasting academic and professional connections, and the achievement of long-term U.S. foreign policy goals with participating countries would be developed and strengthened through Fulbright Scholar exchanges. The award recipient will:

- Maintain participant data electronically, including individual grant amount, home and/or host institution cost-share, and 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; country of citizenship; country of program; country of residence; participant type; field of study/research topic; home institution; host institution or affiliation; Fulbright Program category/subcategory; 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.
- Propose virtual or “blended” (combined in-person and virtual) activities to enhance and supplement in-person exchange activities, including activities involving program alumni.
- Design interim and final participant reports and an online system for their submission and ensure that scholars complete these programmatic reports as required. Ensure that submitted participant reports are easily accessible to ECA/A/E, Fulbright commissions and U.S. embassies.
- In consultation and with the approval of the ECA/A/E regional branches, respond to renewal/extension inquiries and requests from participants.
- Submit all required reports. (See section on “Program Reporting” under “Program Specific Guidelines” for guidance on required statistical and financial reports.)
- Begin program planning for application review, screening and selection (see A.2 Application, Screening, and Independent Selection Process), for applications submitted under the recruitment conducted for the 2022-2023 cohort (see A.1 Recruitment of Applicants).

## **B. Fulbright Visiting Scholar Program**

The Fulbright Visiting Scholar Program provides grants to approximately 1,037 visiting scholars from over 120 partner (foreign) countries to conduct advanced research and teaching at U.S. institutions, for programs ranging from an academic semester to an academic year. Responsibilities of the award recipient for the Fulbright Visiting Scholar Program include:

### **B.1 Outreach**

The award recipient should, in close consultation with ECA, develop a broad strategy for publicity and outreach for the Fulbright Visiting Scholar Program that includes a focus on internationalizing the U.S. campus and diversifying the group of institutions participating as hosts in the Fulbright Scholar Program. The award recipient will:

- Advise ECA on issues regarding the placement of Fulbright Visiting Scholars at U.S. universities and other appropriate institutions for collaborative research, teaching, or professional engagement.
- Publish an online directory of Fulbright Visiting Scholars receiving awards each year, including updates on a regular basis in order to maintain the most accurate information.
- Encourage current Fulbright Visiting Scholars to assist in the recruitment of candidates for the Fulbright U.S. Scholar Program and Fulbright U.S. Student Program and provide them with the appropriate resources and information to undertake this activity at their home institutions or elsewhere.

### **B.2 Fulbright Outreach Lecturing Fund (OLF)**

The Fulbright Outreach Lecturing Fund enables U.S. colleges and universities to request short-term (two- to six-day) visits by Fulbright Visiting Scholars in the United States. Participants have already been selected as Fulbright Visiting Scholars and are on their scholar programs in the United States. Scholars engage with the host OLF institutions and surrounding communities in a variety of ways in an effort to assist the internationalization of U.S. academic institutions, promote the Fulbright Program, and provide visiting scholars with additional U.S. experiences. Approximately 200 OLF visits are funded per fiscal year. The award recipient will:

- In consultation with ECA/A/E, produce and disseminate materials to promote Fulbright Outreach Lecturing Fund opportunities to U.S. colleges and universities, emphasizing that OLF activities are driven by the needs of the U.S. host institutions and preference is given to institutions less engaged with the Fulbright Program. Particular attention should be devoted to encouraging MSIs, community colleges, small liberal arts colleges, rural colleges and universities, military service academies, and higher education institutions in underrepresented states/geographic areas to apply to host Fulbright Visiting Scholars through the OLF.

- Develop and disseminate materials that advise visiting scholars about the OLF program and how to participate.
- Develop and disseminate OLF materials to Fulbright commissions and U.S. embassies to ensure that grantees are made aware of OLF and provided with up-to-date guidance during pre-departure orientations abroad.
- Provide promotional materials that assist scholars participating in the OLF program to promote other Fulbright grant opportunities, managed by all Fulbright implementing partners, to the host academic communities they visit through OLF.
- Work with U.S. institutions and with Fulbright Visiting Scholars to arrange OLF travel and/or complete travel reimbursement procedures, make other logistical arrangements as needed, and obtain host institution and visiting scholar reports on completed OLF visits.
- Provide ECA/A/E with quarterly and final reports on all OLF activity. Quarterly reports should be both programmatic and financial in nature; including information such as scholar name, home country, discipline, home and host institution, host institution type, activity, cost, cost-share, etc. The final OLF report is due by November 30, 2021 and should be included in the Joint Annual Report (JAR).
- Integrate OLF activities into the broader recruitment and outreach plans for all Fulbright Programs. For example, promote the Fulbright OLF Program at scholar enrichment events, encourage host institutions to publicize OLF activities as a means of promoting the larger Fulbright Program, collect and utilize impact stories from OLF engagement and share with the ECA/A/E Outreach staff, promote continued engagement between the scholar and the OLF host institution, etc.
- The award recipient's staffing model must include a level of effort consistent with the needs of OLF activities, and should be clearly indicated in any organizational charts.

### **B.3 Screening and Affiliation**

The award recipient is responsible for applicant screening and arranging and/or confirming institutional affiliations, as necessary, for Fulbright Visiting Scholars in tandem with work done by nominating bilateral Fulbright commissions and U.S. embassies. The award recipient will:

- Receive and screen all nominated applications from binational Fulbright commissions or U.S. embassies and conduct a technical review for program eligibility and application completeness. The award recipient will screen all applications for eligibility and suitability according to Chapter 700 of the Fulbright Policies ([https://eca.state.gov/files/bureau/chapter-700\\_0.pdf](https://eca.state.gov/files/bureau/chapter-700_0.pdf)), provide ECA/A/E with a checklist of criteria by which the applications were screened, and confirm that screening has taken place at the time that slates of nominated candidates are transmitted through ECA/A/E to the FFSB for selection.

- As part of the eligibility screening, implement a plagiarism review of all visiting scholar applications.
- Confirm institutional affiliation for self-placed scholars from countries designated by ECA/A/E. The majority of visiting scholars are currently self-placed and arrange their own affiliations in the United States.
- Arrange affiliations for Fulbright Visiting Scholars (approximately 50 to 100 scholars annually) at appropriate U.S. institutions. The award recipient should make U.S. embassies, Fulbright commissions, and potential applicants aware of the affiliation services available for visiting scholars in need of assistance. To the greatest extent possible, Fulbright Visiting Scholars should be placed at minority-serving institutions, institutions of higher education in underserved geographic locations including rural communities, and community colleges that have less opportunity for, or experience with, hosting foreign lecturers and researchers.
- Encourage and maximize host institution cost-sharing for all visiting scholar affiliations and provide detailed reports to ECA on actual cost-share. Monitor trends in host institution cost-share and other conditions affecting the Fulbright Visiting Scholar Program.
- Submit slates of Fulbright Visiting Scholar Program candidates from countries to ECA/A/E for transmittal to the FFSSB for final selection, as needed.

#### **B.4 Basic Support Services**

The award recipient will provide the following basic support services for the Visiting Scholar Program:

- Consult with ECA/A/E regarding the review of medical clearance forms for select visiting scholars; contract with a qualified physician for the review of medical forms in consultation with ECA/A/E.
- Collect data on primary and secondary health coverage for each participant enrolled in ASPE or other health benefits plan as directed by ECA.
- Advise grantees participating in ASPE of the program policies, benefits, limitations, and procedures for filing claims.
- Provide all visiting scholars with information about supplemental health, including health coverage for dependents. Confirm health benefit coverage for all dependents per J visa requirements.
- Prepare grant terms and conditions documents for participants from all countries without Fulbright commissions and some countries with Fulbright commissions, as directed by ECA/A/E, using established monthly stipend and allowance rates. Develop standard or template terms and conditions for use by Fulbright commissions when issuing grants to commission-administered participants.

- In consultation with ECA/A/E, determine rates for participant monthly stipends (for housing and maintenance) and allowances. Request ECA approval of any changes to established stipend levels, as needed.
- Serve as Alternate Responsible Officers (AROs) for the issuance of DS-2019 forms via the Student and Exchange Visitor Information System (SEVIS), monitoring and maintaining appropriate nonimmigrant visa status for scholar participants at all times. Prepare DS-2019 forms for all Fulbright Visiting Scholars and their dependents and expedite delivery of these forms to Fulbright commissions and U.S. embassies, well in advance of grant start dates to allow for scheduling of J-visa interviews at the appropriate U.S. embassy or consulate overseas.
- Provide timely documentation for participants' continuation of stay in the United States, border crossings, and employment. Process scholar employment authorizations per Department of Homeland Security regulations and in conjunction with ECA/A/E. Ensure that participants abide by all J-visa regulations.
- Assist with incoming and return travel for select countries. The award recipient should ensure that relevant travel adheres to regulations of the "Fly America Act."
- In consultation with ECA/A/E, arrange transfer of J visa program sponsorship to U.S. universities when ECA/A/E and Fulbright commissions or U.S. embassies approve such requests.
- Contract with a tax service provider to assist visiting scholars in complying with Federal and state income tax regulations. In accordance with *The Tax Reform Act of 1986*, *The Tax Cuts and Jobs Act of 2017*, and other legal requirements calculate the appropriate income tax amounts to be withheld from visiting scholar grants.
- Help participants comply with federal, state and local regulations, including but not limited to those related to tax liability (report incoming travel benefits to IRS), indebtedness, and expired permission to reside in the United States.
- Develop and submit a comprehensive monitoring plan for the Fulbright Visiting Scholar Program, including specific approaches to communicating with U.S. host institutions. The safety and security of visiting scholars in the United States is a top priority for the Fulbright Program. The monitoring plan should clearly indicate which staff members are responsible for the monitoring of visiting scholars and the level of effort anticipated. In consultation with ECA/A/E, establish protocols for systematic monitoring of Fulbright Visiting Scholars through both in-person and/or virtual engagement. At a minimum, 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 Visiting Scholars should have clear points of contact to address any concerns or issues while on program. This monitoring plan should also include

a clear approach to ensuring communication about grantee issues with ECA/A/E, Fulbright commissions and U.S. embassies, when necessary.

- Proactively monitor Fulbright participants' status, focusing on issues such as cultural adjustment, physical and mental health, personal safety, and overall success for their duration of sponsorship, ensuring that there is effective networking among participants in the same host institution or region, and with the U.S. scholars, faculty, and communities in which they are placed.
- Alert ECA/A/E to any major issues that arise related to scholar well-being in a timely manner. In consultation with ECA/A/E, develop detailed protocols to standardize best practices in response to academic, legal, medical, and other participant issues.
- Provide ECA/A/E with an alert list, which includes information on participants who require additional monitoring.
- Design interim and final participant report templates and an online system for their submission and ensure that visiting scholars and host institutions complete these programmatic reports. Ensure that submitted reports are easily accessible to ECA/A/E, Fulbright commissions and posts.
- Assist ECA in handling crises affecting visiting scholars in the United States, such as medical emergencies and medical evacuations, including mental and physical health issues; natural disasters; and repatriation of remains. This includes emergency support services in the event of program suspensions and/or circumstances necessitating the repatriation of visiting scholars.
- Process extensions, renewals, withdrawals and transfers of J-visa program sponsorship, after obtaining ECA/A/E approval regarding such requests, as necessary. Inform and seek advance approval from Fulbright commissions and U.S. embassies as appropriate.
- Propose virtual or "hybrid" (combined in-person and virtual) activities to enhance and supplement in-person exchange and the enrichment activities outlined below, including activities involving program alumni.

## **B.5 Enrichment**

Fulbright Visiting Scholar enrichment programs currently consist of 1) thematically focused three- to four-day enrichment seminars for approximately 75 visiting scholars per seminar, that are held in different parts of the United States, 2) a series of local enrichment activities and events organized in predetermined "Anchor Cities" where there are large concentrations of Fulbright Visiting Scholars, and 3) a virtual professional development series with sessions offered throughout the academic year allowing for visiting scholar participation regardless of varying individual program start dates. The purpose of enrichment activities is to enable scholars to experience the United States, engage with U.S. citizens and each another, participate in professional development opportunities, and explore topics of national and global importance.

The award recipient will work closely with ECA/A/E in the development of a cohesive plan for Fulbright Visiting Scholar enrichment activities, which will include:

- 1) Organizing one competition to solicit proposals from eligible organizations to plan, implement, and evaluate up to four in-person Fulbright Visiting Scholar thematically-focused enrichment seminars.
- 2) Organizing one competition to solicit proposals from eligible organizations to plan, implement, and evaluate a series of local enrichment events and activities in specific locations (“Anchor Cities”) with significant numbers of Fulbright Visiting Scholars (Atlanta, Boston, Chicago, Los Angeles, New York City, and San Francisco). Eligible organizations include non-governmental organizations, Global Ties U.S. Community-Based Members, and higher education institutions. The award recipient must ensure that all enrichment programming achieves predetermined enrichment goals and is conducted in a fair and timely manner.
- 3) Organizing at least five virtual, professional development programs, open to all Fulbright Visiting Scholars on program in the United States. Professional development programs should be interactive and include subject matter experts on topics of interest to visiting scholars, such as developing professional networks, writing grants and proposals, project management, publishing in academic journals, etc.

To meet these enrichment goals, the award recipient will:

- Organize a process to review and evaluate submitted proposals and present to ECA/A/E a comprehensive overview of proposal review results and recommendations, including a suggested schedule of all enrichment activities and proposed budgets, for ECA final approval.
- Plan and implement up to four seminars for visiting scholars on multidisciplinary topics. The budget request for these seminars should not exceed \$475,000. The award recipient should maximize cost-sharing provided by implementing partners and local communities.
- Plan and implement local enrichment programming in the designated Anchor Cities. The budget request for these Anchor City activities should not exceed \$250,000. The award recipient should maximize cost-sharing provided by partner organizations and local communities.
- Plan and implement at least five virtual, professional development programs for Fulbright Visiting Scholars. The budget for these webinars should not exceed \$10,000.
- Submit all enrichment program plans to ECA/A/E for approval, including all proposed events, before funds are expended or speakers and participants are invited. ECA/A/E must also approve all print and electronic materials related to these activities.

- Oversee the implementation of all enrichment programming, ensuring that all enrichment goals are met and activities are conducted as approved by ECA/A/E.
- Share activity reports submitted by partners implementing enrichment events with ECA, and prepare a final, comprehensive report to be presented to ECA no later than two months after the conclusion of the last FY 2022 enrichment activity. The award recipient should consult with ECA to determine all elements to be included in the final report.
- For all enrichment programming, follow “branding” guidelines established by the U.S. Department of State and the Fulbright Program.
- Work with the ECA/A/E Outreach staff to develop and implement a strategic communications plan (including both traditional and social media) to publicize Fulbright enrichment seminars and highlight visiting scholars attending seminars.
- Assist in administering ECA funds to the Fulbright Association in consultation with ECA/A/E.

**C. Responsibilities of the award recipient for Special Program Activities include:**

**C.1 Fulbright Scholar-in-Residence Program**

The Fulbright Scholar-in-Residence Program enables U.S. colleges and universities to apply to host Fulbright Visiting Scholars from abroad for a semester or an academic year to teach on campus as part of the host institution’s internationalization effort. Scholars also engage with students, faculty, and staff across campus and interact with the surrounding community. In addition to the basic support services for visiting scholars listed in section B.4 Basic Support Services (above) the award recipient will:

- Develop and implement an innovative recruitment and publicity plan, in close coordination with ECA/A/E, to advertise the program to U.S. institutions of higher education, with particular attention to the program’s target institutional audiences, those with less opportunity to host visiting scholars and/or institutions serving minority audiences. This includes small liberal arts colleges, community colleges, rural colleges and universities, military institutions, and all MSIs. Efforts should be made to increase institutional applications for scholars from world regions deemed underserved in the S-I-R program.
- As part of the institutional recruitment process, develop and implement an institutional interest survey for U.S. colleges and universities. This annual survey should allow U.S. institutions to express their interest in submitting an application for the Fulbright S-I-R Program in future program cycles.
- Produce online program guidelines and application materials in close collaboration with ECA/A/E.
- Provide application guidance to U.S. institutions of higher education and provide feedback on applicants’ draft proposals, if requested.

- Organize a review process to evaluate proposals from U.S. applicant institutions.
- Produce and distribute program and procedural guidance and related program materials for Fulbright commissions and U.S. embassies concerning their roles in program implementation, in close collaboration with ECA.
- After the peer review process is completed, work closely with the U.S. institutions, Fulbright commissions and U.S. embassies, and with ECA/A/E in the process of recruiting, confirming and approving individual scholars.
- Work with ECA/A/E to obtain FFSB approval of institutions and individual scholars.
- Work with scholars until their arrival in the United States and then at their U.S. host institutions to ensure that all requirements are met and all logistical arrangements are made. This includes writing grant documents, preparing DS-2019s, and handling other J-visa matters, managing compensation, enrolling participants in ECA's health benefits program, and making other logistical arrangements as necessary.
- Propose a plan for virtual pre-departure or arrival orientations and in-person and/or virtual enrichment activities specifically designed for S-I-R participants, in consultation with ECA, U.S. embassies and Fulbright commissions, and other relevant stakeholders.
- Monitor activities of S-I-R participants and of host institutions to ensure that programs are completed successfully and that the intended program impact is achieved.
- Maintain up-to-date information on the S-I-R program, including guidelines, procedures, participant statistics, examples of participant experiences, and of the program's impact on host institutions, on the Fulbright Scholar Program website and in reports, as required by ECA/A/E.

## **C.2 Fulbright Global Scholar Awards**

The Fulbright Global Scholar Awards allow U.S. academics and professionals to engage in multi-country, trans-regional projects. Fulbright Global Scholars conduct research and teaching activities in two to three countries with flexible scheduling options. Participants represent a broad range of fields and levels of professional experience. The award recipient will:

- Feature the Global Scholar Awards in U.S. scholar outreach and recruitment efforts, promoting the program to a wide range of scholars at different stages of their professional careers and applicants outside academia (such as attorneys, business professionals, artists, and journalists).
- Respond to inquiries from potential applicants, nominees, and participants.

- Manage the application and selection process for U.S. scholars and conduct a technical review of applications for eligibility and completeness.
- Arrange the review of applications in line with the core U.S. scholar peer review process, including peer review committees organized by disciplines represented in the applicant pool.
- Provide ECA/A/E, Fulbright commissions, and U.S. embassies with information on the results of the peer review and solicit Fulbright commission and U.S. embassy ratings and feedback on applicants.
- Coordinate program-specific virtual pre-departure orientations for participants, in consultation with ECA, Fulbright commissions and U.S. embassies, and other relevant stakeholders.
- Provide ongoing support for participants, including disbursement of grant payments, arrangement of travel, and other services as needed.
- Monitor participants through check-ins and ensure the completion and submission of their mid-term and final reports.
- Integrate the Global Scholar Awards into the broader recruitment and outreach plans. Collect and utilize impact stories, and professional achievements, from Global Scholars and promote continued networks between the U.S. scholar and the host institution(s).

### **C.3 Fulbright Public Policy Fellowships**

Fulbright Public Policy Fellowships provide opportunities for U.S. early to mid-career professionals and academics to serve in professional placements in foreign government host ministries or institutions, while carrying out a related academic project. Fulbright Public Policy Fellows (“Fellows”) build mutual understanding and contribute to strengthening the public sector in their host country while gaining public policy experience in their area of expertise. Fellows will carry out a professional placement as well as undertake an independent research project that focuses on a public-policy-related issue.

Fulbright Public Policy Fellowships maintain flexible scheduling options from four- to nine-months. Participants represent a broad range of fields and professional experiences in areas that support public policy initiatives. Award recipient responsibilities will include:

- Feature the Fulbright Public Policy Fellowship in U.S. scholar outreach and recruitment efforts, promoting the program to U.S. professionals and scholars with experience applicable to public policy placements. Efforts should focus on applicants outside academia (such as professionals in public health, law, economics, environmental fields, agriculture, communications, educational administration, and other fields).

- Respond to inquiries from potential applicants, nominees, and participants.
- Manage the application and selection process and conduct a technical review of applications for eligibility and completeness.
- Arrange the review of applications, and interviews as requested, consistent with the core U.S. scholar peer review process, including peer review committees organized by disciplines represented in the applicant pool.
- Provide ECA/A/E, Fulbright commissions, and U.S. embassies with information on the results of the peer review and solicit Fulbright commission and U.S embassy ratings and feedback on applicants.
- Coordinate application materials and the selection process with U.S. embassies and Fulbright commissions.
- Coordinate program-specific pre-departure or arrival orientations for participants, in consultation with ECA, Fulbright commissions, U.S. embassies, and other relevant stakeholders.
- Provide ongoing support for participants, including disbursement of grant payments, travel and visa arrangements, and other services as needed. Provide regular updates to ECA/A/E.

#### **C.4 Special Cohort and Thematic Programs**

In close coordination with ECA/A/E, the award recipient will design and plan special programs to place visiting scholars from selected countries at U.S. colleges and universities and U.S. scholars at host institutions in select countries abroad to enhance discipline knowledge, increase professional networks between U.S. and international counterparts, and help participants master new pedagogical approaches. Participants will be early career (junior) or senior faculty from tertiary institutions. Special regional and cohort and thematic programs include, but are not limited to:

**The International Education Administrators Seminars** are designed to establish connections between international education professionals in the United States and education officials from higher education systems in other countries. These two-week programs provide approximately 90 scholars the opportunity to explore a country's higher education system and establish new ties and networks with others in the field of international education. Participant numbers for the IEA Seminars vary year-to-year. Seminar activities may include university and college visits and talks with administrators and faculty in the field of education at various institutions. The Russia Community College Administrators Seminar focuses on the role of community colleges in higher education and workforce development and establishes institutional relationships and collaboration between U.S. and Russian institutions and administrators. For the IEA Seminars, the award recipient will:

- In close consultation with Fulbright commissions (or the Fulbright office in Moscow), assist with

recruitment, publicity, outreach, and peer review for Fulbright IEA Seminar participants in France, Germany, India, Japan, South Korea, Taiwan, and Russia and other countries to be determined pending the availability of FY 2022 funds.

- Provide program planning and management; host institution screening and selection; and support services for IEA Seminars for Visiting Scholars from India and South Korea.
- If requested by ECA, the award recipient will design and manage other special and/or regional programs for Fulbright Visiting Scholars at U.S. colleges and universities and for U.S. scholars at institutions abroad.
- Provide program planning and management; recruitment, publicity, and outreach; participant screening and selection; host institution screening and selection as needed; and support services for the IEA Seminars for U.S. Scholars in France, Germany, Japan, India, South Korea, and Taiwan.

Pending the availability of funds, ECA/A/E intends to continue one cohort-based, thematic program in FY 2022: **The Fulbright Arctic Initiative**. The Fulbright Arctic Initiative supports and facilitates cross-discipline research and cooperation on shared challenges in the Arctic among scholars from the eight member states of the Arctic Council (Canada, the Kingdom of Denmark, Iceland, Finland, Norway, Russia, Sweden, and the United States). Approximately 20 scholars will participate in each program for an 18-month period. Additional cohort-based programs beyond these two may be created by ECA to address key regional or topical priorities, pending availability of funds. For this cohort program, the award recipient will:

- Actively advise, research, and assist ECA/A/E in the recruitment of highly-qualified subject matter expert(s) to serve as distinguished lead scholar(s), and draft and manage a services agreement with the selected individual(s).
- Provide advice and consult with ECA on the selection of program themes of international significance, as needed.
- Prepare a program budget and timeline of activities.
- In collaboration with ECA, manage the recruitment process for U.S. participants and provide guidance to Fulbright commissions and U.S. embassies on the recruitment and nomination of visiting scholars, including the development and dissemination of recruitment materials.
- Develop and manage the application and selection process for U.S. and visiting scholars, including the development and implementation of an online application.
- Provide ongoing support for participants, including grant payments, travel and visa arrangements, and other services as needed.

- Provide and administer online communication platform(s) for participants and distinguished lead scholar(s), including webinars, virtual conferencing, etc.
- Monitor participant progress through regular check-ins and their submission of mid-term and final reports.
- Assist Fulbright commissions and distinguished lead scholar(s) to organize and administer opening and mid-term plenary meetings outside of the United States.
- In consultation with ECA and lead scholar(s), organize and administer one or more plenary meetings in Washington, D.C., including managing all contracts with outside vendors.
- Maintain website with description of program and list of current participants and alumni.
- Encourage private sector engagement and support, including cost-share.
- In conjunction with ECA, develop a publicity plan to highlight program impact and disseminate outcomes. This should include descriptions of the experiences and accomplishments of individual program participants and should contemplate multiple platforms of dissemination, including social media, web, video, and traditional print media.
- Develop suggestions for possible follow-on activities for alumni including mini-grants, alumni seminars or workshops, publications, etc.

#### **D. General Program Responsibilities of the Award Recipient:**

The award recipient will:

- Provide ECA/A/E with an organizational staff chart and provide an updated version of the staff chart quarterly.
- Provide position descriptions that describe the day-to-day responsibilities of staff, including key personnel, mid-level, and program support positions.
- Provide statistical and participant data to ECA on a regular basis for the Academic Exchanges Information System (AEIS) database and/or related data systems that maintain statistical records on participants; consult with ECA/A/E to determine the requirements of the AEIS database. FY 2021 language: 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; 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.

- Develop protocols for the collection, use, maintenance, and dissemination of personally identifiable information (PII) ensuring that the personal information of Fulbright applicants 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 award recipient and ECA. Additionally, ECA/A/E encourages award recipients to establish internal protocols ensuring appropriate collection, use, maintenance, and dissemination of PII. Where applicable, ensure these practices fall within parameters required by the European Union's *General Data Protection Regulation (GDPR)*.
- Prepare standard report forms for use by all grantees and ensure that reports are completed and made available to ECA/A/E Program Staff on a timely basis. Program report forms should be distributed to new participants. Material from the reports should be used to highlight significant accomplishments in publicity and promotional materials about the program.
- Populate the Fulbright Program's digital asset management system, the Fulbright Source, a shared virtual platform utilized by all Fulbright implementing partners and administrators. 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.

#### **E. Fulbright Association (FA)**

In close consultation with ECA/A/E, the award recipient will enter into a sub-award that provides programmatic and administrative funds to the Fulbright Association to:

- Support activities and projects proposed by the Fulbright Association and/or its local chapters, which strengthen the capacity and broaden the reach of the FA. This may include funding for activities such as virtual or in-person networking events with current Fulbrighters and alumni, membership drives, IT enhancements, etc. to further promote the Fulbright Program. Pending the availability of funds, up to \$250,000 is available for this purpose.

## **F. Outreach and Marketing**

In addition to targeted recruitment for U.S. scholars and professionals, as discussed above, the award recipient will develop a marketing and publicity campaign designed to raise public awareness of the Fulbright Scholar Program and to demonstrate impact; innovations; new program models; diversity of participants, alumni, and partner institutions; and benefits to campuses and local communities in the United States and abroad. The marketing and publicity campaign should be designed in concert with recruitment planning, but should focus on informing both a broad, general audience and targeted strategic audiences in the United States and abroad, about the value, importance and relevance of the Fulbright Program in today's world. The award recipient will:

- Participate in, carry through, and promote any ongoing Fulbright outreach and marketing activities that would contribute to the celebration of the Fulbright 75<sup>th</sup> Anniversary in the remaining months of 2021. Activities may be in-person and/or virtual and should involve program participants and alumni, home and host institutions, and other program stakeholders.
- Maintain and update a general information website, in consultation with ECA/A/E Outreach staff that describes the Fulbright Scholar Program and all of its components. The website content should be interactive and must emphasize the accomplishments, experiences, impact, and diversity of current and past program participants as well as provide details of current award opportunities. The award recipient must regularly check the website content to ensure that all posted material is current and correct, and must submit any new strategies for presenting program information or major revisions of current online materials to ECA for approval prior to development. ECA may request that website content be added or removed in a timely manner, including information pertaining to the awards catalog.
- Propose methods to regularly engage and solicit input about the Fulbright Scholar Program from leaders in U.S. higher education.
- Propose plans for collecting, analyzing, reporting, and presenting impact data from Fulbright Scholars and alumni and maintaining records of impact data from previous years. Special emphasis should be given to data visualization.
- Widely advertise and promote ECA's Fulbright Program website (<http://eca.state.gov/Fulbright>) and provide draft material for ECA's Fulbright Program website, when requested by ECA/A/E.

Publications, program materials, the website and all other online programs, including social media accounts, should explain the mission of the Fulbright Program, its binational character, and highlight the U.S. government and the 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 <http://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 award recipient in administering the program. Publications should prominently feature the Fulbright logo and the U.S. Department of State seal, in accordance with established guidelines. The publicity strategy and all publication materials such as brochures, including 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, participants, campus contacts, conference organizers and attendees, Fulbright commissions and U.S. embassies, and peer review committees should be submitted for ECA/A/E Outreach staff review before distribution. Prior to ECA/A/E review, all print and online materials should be carefully drafted, edited, and revised to meet standards commensurate with the prestige and academic character of the Fulbright Scholar Program.

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

## **G. Fiscal Management**

The award recipient will:

- Communicate with Fulbright commissions regarding anticipated FY 2022 awards to scholars and be able to provide ECA with anticipated grantee numbers and estimated funding amounts for Commission-funded grantees.
- Manage stipend payments for participants going to countries without Fulbright commissions.
- Manage stipend and university/affiliation payments for visiting scholars from non-commission countries and from a limited number of commission countries, as directed by ECA/A/E. Prepare and distribute payments to participants and host institutions, as appropriate.
- Administer memorandums of understanding (MOUs) and/or other agreements with cost-share partners in support of the Fulbright Visiting Scholar Program. As requested by ECA, provide status updates, financial reports, etc. regarding these funding relationships.
- Audit internal functions, systems, and controls, as necessary.

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

## **H. Other Program Activities of the Award Recipient**

The award recipient will also be responsible for other special projects as directed by ECA/A/E.

## I. Abridged Calendar of Fulbright Scholar Program Activities

The following calendar provides a general workflow guide, in a normal program cycle, but should not be viewed as a comprehensive list of all programmatic activities. It is intended to provide applicants with an overview of significant activities and tasks that take place each quarter for the various program components.

<p style="text-align: center;"><b>October 2021 – December 2021</b></p> <p><u>U.S. Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Start to release slate of recommended candidate to ECA, Fulbright commissions and U.S. embassies via on-line application and FFSB transmittal systems</li> <li>• Start to inform 2022-2023 candidates of their status</li> <li>• Host application review panels</li> </ul> <p><u>Visiting Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Start to send 2022-2023 application deadline reminders to commissions and U.S. embassies</li> <li>• Send general guidance on the visiting scholar program to include eligibility criteria, best practices for review panels, and sample interview questions</li> <li>• Monitor arrival of Visiting Scholars and related SEVIS validation needs, enrollment in ASPE</li> </ul> <p><u>Recruitment/Outreach:</u></p> <ul style="list-style-type: none"> <li>• Participate in conferences and meetings</li> <li>• Start drafting the 2023-2024 U.S. Scholar Program Catalog of Awards in collaboration with Fulbright commissions, U.S. embassies, and ECA</li> <li>• Start outreach to Fulbright campus contacts network</li> </ul> <p><u>General:</u></p> <ul style="list-style-type: none"> <li>• Develop methods for providing participants with tax information and filing support</li> <li>• Develop program materials – websites, handbooks, scholar reports, etc.</li> <li>• Contract with a physician to review medical clearance forms</li> <li>• Contract with venues for 2022-2023 Pre-Departure Orientations (PDOs) for U.S. Scholars and Students</li> </ul>	<p style="text-align: center;"><b>January 2022 – March 2022</b></p> <p><u>U.S. Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Continue to inform 2022-2023 candidates of their status</li> <li>• Start to verify individual scholars' award details with Fulbright commissions and U.S. embassies, obtain medical clearance and prepare grant documents</li> <li>• Launch recruitment for the AY2023-2024 competition cycle</li> </ul> <p><u>Visiting Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Visiting Scholar applications due to ECA and cooperating organization from Fulbright commissions and U.S. embassies</li> <li>• Start the technical review of 2022-2023 visiting scholar applications</li> <li>• Confirm U.S. institutional affiliations and place/affiliate scholars without identified host institutions</li> <li>• Start to verify grant details with Fulbright commissions and U.S. embassies, obtain medical clearance, prepare grant documents, and issue DS-2019s</li> </ul> <p><u>Recruitment/Outreach:</u></p> <ul style="list-style-type: none"> <li>• Participate in conferences and meetings</li> <li>• Continue outreach to Fulbright campus contacts network</li> <li>• Develop Outreach Lecturing Fund (OLF) materials</li> <li>• Finalize the 2023-2024 U.S. Scholar Program Catalog of Awards</li> </ul> <p><u>General:</u></p> <ul style="list-style-type: none"> <li>• Provide scholars with tax resources and information</li> <li>• Start planning for 2022-2023 U.S. PDOs for U.S. Scholars and Students</li> <li>• Submit quarterly financial report</li> </ul>
<p style="text-align: center;"><b>April 2022 – June 2022</b></p> <p><u>U.S. Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• 4/1/2022 - Preferred deadline to notify 2022-2023 U.S. Scholar candidates of their status</li> <li>• Continue to verify individual scholars' award details with Fulbright commissions and U.S. embassies, obtain medical clearance and prepare grant documents</li> <li>• Plan/Implement PDOs for U.S. Scholars and Students</li> <li>• Begin planning 2023-2024 U.S. Scholar peer review panels and identify panelists</li> </ul> <p><u>Visiting Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Continue the technical review of 2022-2023 visiting scholar</li> </ul>	<p style="text-align: center;"><b>July 2022 – September 2022</b></p> <p><u>U.S. Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Establish and notify Fulbright commissions and U.S. embassies of the 2023-2024 U.S. Scholar peer review timeline</li> <li>• Continue to plan/implement PDOs for U.S. Scholars and U.S. Students</li> <li>• 9/15/2022– Application deadline for 2023-2024 core U.S. Scholar Program</li> <li>• Begin technical review of 2023-2024 U.S. Scholar applications</li> <li>• Share results of U.S. Scholar competition with ECA. Based on application data, consult with ECA to identify needs for</li> </ul>

<p>applications</p> <ul style="list-style-type: none"> <li>• Continue to verify grant details with commissions and U.S. embassies, obtain medical clearance and prepare grant documents</li> <li>• Continue to confirm U.S. institutional affiliations and place/affiliate scholars without identified host institutions</li> <li>• Start to verify grant details with Fulbright commissions and U.S. embassies, obtain medical clearance, prepare grant documents, and issue DS-2019s</li> <li>• Begin Enrichment Seminar and Anchor Cities competition for 2022-2023 visiting scholars</li> </ul> <p><u>Recruitment/Outreach:</u></p> <ul style="list-style-type: none"> <li>• NAFSA, Fulbright campus contacts network workshop, and other outreach activities</li> <li>• Propose the plan for 2023-2024 recruitment/outreach activities</li> <li>• Consult with ECA's Regional Branches concerning priority awards and regionally-specific outreach needs</li> </ul> <p><u>General:</u></p> <ul style="list-style-type: none"> <li>• Submit quarterly financial report</li> </ul>	<p>late summer outreach or extended recruitment efforts</p> <p><u>Visiting Scholar Program:</u></p> <ul style="list-style-type: none"> <li>• Continue to prepare for arrival of 2022-2023 Visiting scholars, including enrollment in health benefits</li> <li>• Monitor scholar arrivals and validate arrival information in SEVIS</li> </ul> <p><u>Special Program Activities:</u></p> <ul style="list-style-type: none"> <li>• Scholar-in-Residence U.S. host institution application deadline</li> <li>• Conduct Scholar-in-Residence peer review of U.S. host institution proposals, as necessary</li> </ul> <p><u>Recruitment/Outreach:</u></p> <ul style="list-style-type: none"> <li>• Plan/Implement 2023-2024 recruitment and outreach activities</li> </ul> <p><u>General:</u></p> <ul style="list-style-type: none"> <li>• Submit quarterly financial report</li> </ul>
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In a cooperative agreement, ECA/A/E is substantially involved above and beyond routine monitoring. In this Agreement, ECA/A/E will be responsible for the following:

1. Participating in the design of, and direction for, all program activities program activities;
2. Approving key personnel of the award recipient;
3. Approving and providing input on program timelines, agendas, and administrative procedures;
4. Providing guidance in execution of all program components;
5. Reviewing and approving all program recruitment, publicity, and outreach materials;
6. Approving participating scholars, in cooperation with Fulbright commissions and U.S. embassies, subject to final selection by the FFSB;
7. Approving changes to scholars' proposed field, program, or institution;
8. Approving decisions related to special circumstances or problems throughout the duration of the program;
9. Assisting with non-immigration status and other SEVIS-related issues;

10. Assisting with participant emergencies, including, but not limited to, serious physical and mental health issues and emergencies, evacuation, and repatriation;
11. Liaising with relevant U.S. embassies, Fulbright commissions, and country desk officers at the U.S. Department of State.
12. Responding to media queries and communicating with the press.

## **II. PROGRAM SPECIFIC GUIDELINES**

### **PROGRAM REPORTING**

#### **Staffing and Key Personnel:**

The proposal and staffing pattern should outline key personnel clearly. Under the Fulbright Scholar 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 quarterly 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. Quarterly staffing patterns need only include level of effort should there be a change from the initial staffing pattern included in the proposal.

#### **Program reporting:**

In collaboration with the award recipients of the Fulbright Student Programs and the Fulbright Specialist Program, the award recipient must contribute program data and narrative text to a Joint Annual Report (JAR) of 2021-2022 Fulbright U.S. and Visiting Scholar Program and Student activity, for submission to ECA by November 30, 2022. This report should also include information on all of the enhancement activities and be developed in consultation with ECA/A/E.

The award recipient must prepare and submit to ECA annual interim and final Performance Progress Reports (SF-PPR) detailing FY 2022 program activities carried out during the period of performance. Interim SF-PPRs are due to ECA semi-annually no later than 30 days after the end of the reporting period. The final SF-PPR is due to ECA no later than 120 days after the end of the award period of performance.

### **Financial reports:**

To allow for the reprogramming of unobligated funds provided for in the Statement of Work (Section I), the award recipient shall provide detailed financial reports for scholar programs, organized by world region and country. Individual scholars should be listed, including the fiscal year when their program began. These reports should capture the amount of programmatic funds transferred to the award recipient to date, total paid expenditures, current balance, unpaid commitments, and projected balance. The first report is due approximately nine months after the start of the Cooperative Agreement. Programmatic financial reports are subsequently due after the end of each fiscal quarter. The award recipient should also provide a minimum of two status reports on administrative funds. The first report should be provided approximately six months after the start of the fiscal year.

The award recipient must prepare and submit to ECA annual interim and final Federal Financial Reports (FFR). Interim FFRs are due to ECA semi-annually no later than 30 days after the end of the reporting period. The final FFR is due to ECA no later than 120 days after the end of the award period of performance.

### **Other reports:**

The award recipient should provide bi-weekly reports on Fulbright U.S. and Visiting Scholars currently on program. Prepare and submit "Alert Lists" based on scholar monitoring to ECA/A/E per semester. Upon request, the award recipient will prepare summary reports on the applicant pool (number of applications, trends, distribution of applications by region, degree objective fields of study, quality), placement, projected costs, statistics, or expenditures, as necessary. The award recipient should provide a final list of participant placements by July 1, 2022. Upon request, the award recipient will provide detailed reports to ECA on actual cost-share from U.S. host institutions and monitor trends in institutional cost-share and other conditions affecting Fulbright U.S. and Visiting Scholar Programs.

### **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 30 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 Evaluation
5. Follow-on
6. Project Management
7. Work Plan/Time Frame

### **Additional Information to be Submitted**

#### 1. General Guidelines

Applicants should submit an administrative budget to support the following: the U.S. and Visiting Scholar Programs, Scholar-in-Residence Program, Global Scholars Program, Fulbright Public Policy Fellowships, special cohort and thematic programs (including the International Education Administrators seminars and the Fulbright Arctic Initiative), and program enhancement costs such as recruitment, pre-departure orientations, enrichment activities, and outreach. As outlined in the budget guidelines below, if the applicant does not include administrative costs specific to the 2022-2023 program in the budget, the proposal should demonstrate the applicant's capacity to provide these support services. Applicants should also submit a budget summary reflecting the budget request for all programs.

Submit a line item budget in a four-column format as indicated below:

Column 1	FY 2022 Bureau funds request
Column 2	Amount of Direct Applicant Cost-Sharing in FY 2022
Column 3	Total FY 2022 Budget (Total of columns 1 and 2)
Column 4	Percent Difference between Columns 3 and 1

#### 2. Budget Guidelines

The total FY 2022 funding request for the administrative budget should not exceed \$6,300,000, pending the availability of FY 2022 funds.

The Bureau anticipates the following scholar caseload in FY 2022:

Core Fulbright Scholar Program Total: 1,995

U.S. Scholars: 953

Visiting Scholars: 1,022

Special Regional Programs (Fulbright Arctic Initiative or similar topic-based program): 20

Please note the following budget guidelines:

1. Provide estimated administrative costs, as well as unit costs, for each support service as follows for FY 2022:

Fulbright U.S. Scholar Program: Recruitment of Applicants, Application, Screening, and Independent Selection Process, Outreach Post-Nomination Services (including Grant Administration), Pre-Departure Orientation Programs, and Program Planning and Reporting Management; Fiscal Management. *NOTE: Recruitment for the 2023-2024 program should be included in the FY 2022 estimated administrative costs. The proposal should demonstrate the applicant's capacity to provide screening and selection for the 2023-2024 program and full program planning and management. However, FY 2022 estimated administrative costs should NOT include recruitment, selection and screening for the 2022-2023 U.S. Scholar Program.*

Fulbright Visiting Scholar Program: Outreach, Outreach Lecturing Fund, Screening and Affiliation; Basic Support Services (including Grant Administration), Enrichment; Fiscal Management. *NOTE: Enrichment planning for the academic year 2021-2022 should not be included in the FY 2022 estimated administrative costs. The proposal should demonstrate the applicant's capacity to provide enrichment planning and implementation for the 2022-2023 visiting scholars with enrichment activities scheduled throughout academic year 2022-2023.*

Scholar-in-Residence Program: Program Planning and Reporting Management; Recruitment; Applicant Screening and Selection; Basic Support Services (Grant Administration, Program and Enrichment Activities); Fiscal Management. *NOTE: Recruitment for the 2023-2024 program should be included in the FY 2022 estimated administrative costs. However, recruitment for the 2022-2023 Scholar-in-Residence Program should NOT be included in the FY 2022 estimated administrative costs.*

International Education Administrators Seminars (use services listed below as applicable to U.S. or visiting scholar cohorts): Program Planning and Reporting Management; Recruitment, Publicity, and Outreach; Participant Screening and Selection; Host Institution Screening and Selection; Basic Support Services (Grant Administration and Program Activities); Fiscal Management. *NOTE: All of the above should be included in the FY 2022 estimated administrative costs.*

Other Special/Regional Programs or Thematic Cohort Programs (for example, Fulbright Arctic Initiative): Program Planning and Reporting Management; Recruitment, Publicity, and Outreach; Participant Screening and Selection; Basic Support Services (Grant Administration and Program Activities); Fiscal Management. *NOTE: All of the above should be included in the FY 2022 estimated administrative*

*costs.*

2. Provide a detailed proposal and costs for domestic and international staff travel.
3. In consultation with ECA/A/E, plan and administer up to four in-person enrichment seminars for Fulbright Visiting Scholars. Provide programmatic cost estimates for enrichment seminars, including participant travel costs. Oversee implementation of Anchor City enrichment activities in Atlanta, Boston, New York City, Los Angeles, and San Francisco.
4. Provide a list of all staff who will administer the FY 2022 Fulbright Scholar Program, including the name, position, amount of time, salary, and benefits attributable to each.
5. Delineate other direct costs, e.g., postage, telephone, reproduction, with percentage attributable to administration of each of the Fulbright U.S. and Visiting Scholar Programs.
6. Provide a detailed explanation of administrative overhead (what elements of the budget it is based upon and how it is calculated).
  - Calendar of activities/itinerary, if applicable
  - Letters of endorsement
  - Resumes and CVs (resumes of all new staff should be included in the submission; no resume should exceed two pages)
  - First Time Applicant Attachments, if applicable

#### **ADHERENCE TO ALL REGULATIONS GOVERNING THE J VISA**

The Bureau of Educational and Cultural Affairs places critically important emphases 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 Designation, Private Sector Programs Division  
U.S. Department of State  
SA-4E (Bldg. 3)  
2430 E Street, NW  
Washington, DC 20037

Please refer to Solicitation Package for further information.

**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 Stephen Money (202-632-3258 or [MoneySD@state.gov](mailto:MoneySD@state.gov)) or Leigh Sours (202-255-3687 or [SoursLA@state.gov](mailto:SoursLA@state.gov)).