



## Terms and Conditions for Fulbright Scholar Awards, Distinguished Chairs and Visiting Professorships

offered by the UNITED STATES - UNITED KINGDOM EDUCATIONAL COMMISSION  
(aka 'Fulbright Commission')

### OVERVIEW

The Fulbright Commission promotes educational and cultural exchange between the United States and the United Kingdom to enhance mutual understanding and strengthen relations between the two countries.

Please read carefully the following general terms and conditions which, should you be offered a Fulbright Award, will form an integral part of the Fulbright Grant Authorisation (US Public Law 87-256, the Fulbright Hays Act). If you (the eventual 'grantee') wish to accept a Fulbright Award, you will be asked to sign and date all copies of a **Fulbright Award Letter** and the final **Fulbright Grant Authorisation Document**, indicating your agreement to abide by these terms.

Additional terms, conditions and policies apply to American Fulbright Award holders. These may be found online at:

- <https://eca.state.gov/fulbright> and
- <http://www.cies.org/program/core-fulbright-us-scholar-program>

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### 1 The Application Process

Applications and the closing date are available online from the Council for the International Exchange of Scholars ('CIES') at <http://www.cies.org/programs>.

Prior to submitting an application, applicants should carefully review the information that is available on the Fulbright Commission's website: [www.fulbright.org.uk](http://www.fulbright.org.uk).

Applicants who may need guidance should contact CIES in the first instance. For contact details please see: <https://www.cies.org/contact-us>.

In making these awards the Fulbright Commission is looking not only for academic excellence but a focused application, a range of extracurricular and community activities, demonstrated ambassadorial skills, a desire to further the Fulbright Programme and a plan to share experiences of the UK upon returning to the US.

The Fulbright Commission does not give feedback and cannot comment on individual applications or give reasons why a candidate is or is not successful.

Following the offer of an award, all subsequent correspondence with respect to your grant, visa and arrival arrangements will be directly with the US-UK Fulbright Commission (the 'Commission'). Please note that the Commission, the Council for the International Exchange of Scholars ('CIES'), and the Institute of International Education ('IIE') are not the same organisation. CIES and IIE are commissioned by the US Department of State to administer the

Fulbright Programme in the US. The Commission is ultimately responsible for all policy decisions relating to your grant.

Grantees will be required to provide one email address that they will use throughout their grant period. This should not be a US university account that will not be accessible during the Fulbright grant period. All Fulbright notifications will be sent to the single indicated email address only. A Fulbright Award is offered conditional upon the approval of the J William Fulbright Foreign Scholarship Board ('FFSB') in the United States.

## **2 TIMING AND DURATION OF GRANT**

A Fulbright Award is offered under an approved annual programme and **cannot** be postponed to a subsequent year.

All Fulbright notifications will be sent to the single indicated email address only. A Fulbright Award is offered conditional upon the approval of the J William Fulbright Foreign Scholarship Board ('FFSB') in the United States.

The grant is based on the period of the grantee's approved activity in the United Kingdom, exclusive of the time spent in international travel (please see section 22 – Travel Outside of the United Kingdom).

Grantees typically arrive to the UK to begin their grant period in September or January, in coordination with planned Orientation and Forum events, unless their Fulbright project requires an earlier or later arrival. All projects must commence by the end of April in the academic year for which an award is made.

The Fulbright grant period is confirmed on the **Fulbright Grant Authorisation Form**. The grant is paid in instalments and subject to the Commission receiving satisfactory progress reports from academic supervisors/hosts and the grantee.

Early departures from the UK will require the approval of the Commission. Unauthorised early departure may result in partial or full grant repayment.

Grantees are expected to return to the United States upon termination of the grant period.

If the grantee remains in the UK beyond the expiry of the grant, it will be at the grantee's own expense and on the condition that the grantee complies with the UK Government visa and work regulations. Grantees remaining in the UK under this provision will not be considered Fulbright scholars during the period they elect to remain abroad. They will no longer be able to represent themselves as current Fulbright scholars except to the extent necessary to making arrangements for return travel (please also see section 19 – Termination of Grant).

## **3 CATEGORY OF GRANT**

No change in the category of grant can be made during the period of this grant without prior approval from the Commission, the ECA/US Department of State and the FFSB.

## **4 INSTITUTION OF AFFILIATION IN THE UK**

Applications are considered on the basis that the applicant will attend the specific institution indicated on their application form. Any change in proposed affiliation or grant purpose plans may invalidate the application resulting in rejection, or if the change takes place following an award offer, the withdrawal of the offer.

No change of affiliation or grant purpose specified on the Grant Authorisation Form may be made without prior approval from the Commission.

**Grantees are responsible for arranging logistical details directly with their hosts at the UK institution and before arrival.**

## **5 GRANT**

**Fulbright grants are capped and are unlikely to be sufficient to fund all the costs associated with your stay. Grants are offered on the condition that you will be able to fund any shortfall between the Fulbright grant and your costs yourself.**

A Fulbright grant is intended as a **contribution** towards travel and living expenses (such as rent and food) and towards the costs associated with the intended research and/or lecturing project (such as lab, or bench fees and materials) for the period of time indicated on the Grant Authorisation Form.

Grant amounts for academic year 2018-19 are confirmed on individual grantees' Conditional Offer Letters and Grant Authorisation Forms.

Grantees are responsible for settling any university or institutional fees, including where necessary 'bench fees' and/or permits and/or background checks, directly.

**The grantee will not be entitled to the grant until taking up their assignment in the UK. The initial grant payment is made shortly after the grantee's arrival in the UK.**

If for any reason the grantee, during the term of their grant, ceases to carry out the approved Fulbright project or activity, the Commission may suspend the grant and any other benefits provided by the award until the grantee resumes the project or activity, and no claim for such allowance or other benefit for such period of suspension shall be honoured.

If for any reason the grantee, during the term of this grant, leaves the UK without the authorisation of the Commission, the Commission may suspend the grant and any other benefit provided by the grant until the grantee returns to the UK, and no claim for such allowance or other benefit for such a period of suspension shall be honoured.

## **6 TRANSPORTATION**

**Grantees are responsible for arranging and paying for their own transatlantic travel, including domestic UK travel to Fulbright events and onward travel to their host destination.**

All grantees must provide the Commission with a travel itinerary or electronic receipt once the international transportation has been purchased. This information should be forwarded to the Commission by email. You will also need to upload this information to the CIES Portal.

The grantee must report his/her departure date from the UK well in advance of departure.

A small travel stipend for domestic (UK) travel expenses will be provided by the Commission for all Fulbright events that take place during the grant period, such as Orientation, Fulbright Forum or Fulbright End-Cap. This travel contribution will be facilitated by way of an allowance (£75 per event) that will be provided early in the grant period and added to a grant instalment.

## **7 METHOD OF PAYMENT**

The grantee is expected to open a UK bank account. Any UK-based bank should be able to provide an appropriate service, with those situated on or near a university campus likely to be experienced in working with international clients. The first payment and subsequent instalments will be deposited directly into the grantee's UK bank account by the Commission.

Grants are paid in the currency stated on your Fulbright Grant Authorisation Form, which is normally the host currency (pound sterling). Any currency conversions are made at the rate prevailing on the day of processing.

Grants are paid in instalments throughout the grant period, not in a single lump sum up front. For many grantees, this means that careful, advance financial planning is required. Your first remittance advice will give the dates of your payment schedule.

Grants of £5,000 or less may be made in a single payment. Grants over £5,000 are paid in instalments and grantees will be notified of the dates of these instalments and the amounts to be disbursed when they receive the first grant payment following arrival in the UK.

A 'remittance advice' will be sent to the grantee whenever a grant instalment is paid, and these should be kept safely as they may be needed to complete a tax return.

**No extensions, renewals or additions to a grant are available.**

In any case of overpayment, the grantee must notify the Commission immediately to ensure an appropriate adjustment is made.

No adjustments will be made because of any changes in the rate of exchange between the pound sterling and US dollar.

## **8 ITEMS NOT INCLUDED**

**The value of your grant is that stated on your Grant Authorisation Form; no further funding will be available.**

The grant does **not** provide for:

- Expenses in connection with passports or photographs
- Costs relating to UK visas
- Costs related to medical examinations
- Costs related to dependants' travel and maintenance
- Shipment of luggage and baggage transfers to the UK

**The grantee is fully responsible for ensuring adequate monetary resources to meet his/her expenses in the US and the UK during the period of the grant.**

Any accompanying dependants are entirely the grantee's responsibility; including provision of required UK visa(s) and insurance (please also see section 8 – Maintenance of Dependants). **The Commission cannot advise on issues pertaining to dependants.** Ultimately, responsibility lies with the grantee and dependant, independently and jointly, to ensure their legality, maintenance and well-being whilst in the UK.

Persons who participate in the US-UK Fulbright Awards Programme are not entitled to receive certain services which may be available to officers and employees of the US Government or its agencies stationed abroad (e.g. access to diplomatic pouch). It is the intention of the programme that recipients of these grants will utilise the economy of the United Kingdom to meet their local living requirements.

## **9 MAINTENANCE OF DEPENDANTS**

Marriage/civil partnership status is not a factor in the selection process for a Fulbright grant, but **the Commission does not offer a maintenance allowance for dependants.** Grantees with dependants must ensure that they have sufficient funds to cover all of their expenses, including those related to obtaining visas and insurance. All grants are contingent upon the grantees' ability to pay for travel and maintenance of any accompanying dependants and grantees must certify to the availability of such funds.

## **10 FULL TIME NATURE OF AWARDS**

This grant is made for full-time lecturing, professional development and/or research in the UK. Acceptance of remunerative employment in the UK, unless approved by the Commission, violates the conditions of the grant. This includes part-time or occasional work. Please notify the Commission if you are considering any form of employment in the UK. If approved by the Commission, any such activities must also fall within the legal parameters and visa requirements of the UK, which the grantee bears responsibility for ensuring.

## **11 ASSISTANCE FROM OTHER SOURCES**

All scholarships, fellowships or grants from other sources received concurrently with a Fulbright grant must be reported to the Commission.

No deduction will be made from the authorised allowances because of benefits derived from the Servicemen's Readjustment Act of 1954 (PL 356, 78th Congress), or from the Vocational Rehabilitation Act (PL 16, 78th Congress), or from the Veteran's Readjustment Act of 1952 (PL 550, 82nd Congress).

Scholarships, fellowships or grants from other sources received concurrently may be deducted from the amount specified in the Grant Authorisation if such awards are given for the same purpose or if they duplicate the benefits under the Fulbright Award.

## **12 ORIENTATION AND OTHER EVENTS IN THE UNITED KINGDOM**

If present in the UK and on award at the time of such events, all grantees are requested to attend in full the 3-day cultural orientation programme in September (London), a 4-day long Fulbright Forum in early January, and a 2-day farewell event, the Fulbright End-Cap, in late June/early July. These dates will be publicised well in advance and should be held clear for Fulbright events.

If the grantee is present in the UK but unable to attend an event, he/she must inform the Commission well in advance, or as soon as a new conflict arises, explaining the reason(s) for not attending.

Accommodation will be provided by the Commission to all grantees during these events.

Details of the Orientation programme will be forwarded to grantees during the summer. Details of the Fulbright Forum and End-Cap will follow in late autumn/winter, and early spring respectively. Grantees are advised to be aware of the dates for these events.

**Grantees are advised to make arrangements for their dependents during these mandatory events as space and cost constraints prevent them from participating in Fulbright events, which are for grantees only.**

Failure to attend or participate in events in full may result in the recuperation of the grantee's travel stipend for the missed event.

## **13 ACCOMMODATION IN THE UK**

Grantees are responsible for arranging and paying for their own housing accommodation, unless otherwise indicated in the Award Letter and by the Grant Authorisation Form. The Commission does not secure accommodation for grantees and is unable to offer advice in the matter.

Grantees are encouraged to investigate accommodation directly with their host institution as far in advance as possible. The Commission may assist with references to secure housing.

## 14 ACCIDENT AND SICKNESS COVERAGE

Limited accident and sickness health benefits are provided for the grantee only. This health benefit programme ("ASPE") is purchased directly by US Department of State from:

Seven Corners, Inc. P.O. Box 3724 Carmel, Indiana 46082-3724 USA  
Email: [aspeinfo@sevencorners.com](mailto:aspeinfo@sevencorners.com)  
Website: [www.usdos.sevencorners.com](http://www.usdos.sevencorners.com)

Grantees will be issued with ASPE insurance ID cards at the start of their grant period. The amount and extent of the insurance coverage is available from the provider.

Similar coverage for any accompanying dependants can be purchased by the grantee.

**All questions regarding insurance coverage should be directed to the insurer and not the Commission.**

It is the grantee's responsibility to ensure that ASPE provides adequate insurance for their needs, and to arrange additional insurance (at his/her own expense) if necessary. The Fulbright Commission is not liable for any loss, damage or injury which a grantee may suffer during his/her time as a Fulbright Scholar and when accepting a grant, the grantee agrees to waive any right they may have to take action against the Fulbright Commission to recover any loss or make any claim for damages

An emergency medical expenses benefit is provided for the grantee only. Should the need for this provision arise, the grantee should inform the Commission, which in turn will provide details of the case to the US Department of State. The State Department will act on the merits of each individual request. Requests for this benefit are not guaranteed.

## 15 CONTINGENCIES

Neither the Commission, the US Department of State, the J William Fulbright Foreign Scholarship Board, CIES nor IIE assumes responsibility for any injury, accident, illness, loss of personal property or other contingencies which may befall the grantee or any dependant during or in connection with his/her stay abroad under this grant.

It is recommended that the grantee personally obtain adequate personal and property insurance for him/her and accompanying dependants. The Commission, the US Department of State, the FFSB, CIES and IIE shall not be liable for any claim or claims which may arise from the grantee's failure to enter upon or to complete a project as detailed in this grant, even where such failure is due to circumstances beyond the grantee's control.

## 16 POSTPONEMENT OF GRANTS

**No grant may be postponed until a subsequent academic year.** In exceptional cases, grantees may be permitted to postpone their grant start date, upon approval by the Commission, CIES or IIE and the institution of affiliation. All grant periods must begin no later than the end of April of the given academic year.

## 17 CHANGES IN FULBRIGHT PROJECT

The grantee cannot change his/her study project without express written permission from the Commission's Executive Director who will consult with the US Department of State and

cooperating agency (CIES or IIE) in making a decision to permit or deny such changes. Any changes must also be approved by the grantee's host institution.

## **18 EFFECTUATION OF GRANTS**

The effectuation of grants is in every instance contingent upon the availability of transportation and sufficient funds, stable conditions in the UK and the award holder's ability to: procure a passport and relevant UK entry clearance (visas and permits), receive medical clearance, and receive FFSB approval.

It is understood and agreed that if conditions beyond the control of the Fulbright Commission prevent or unduly hamper the timely or adequate implementation of the grant in the UK as designated in the Grant Authorisation Document, the grantee may be reassigned to another country as agreed mutually with the grant-issuing organisation or organisations involved. Allowances and other financial terms will be adjusted in accordance with the schedules for stipends and allowances in the country to which the grantee is reassigned. In the event that such a reassignment is not satisfactorily arranged, the grantee will be provided return transportation, if abroad, not to exceed the equivalent of one month's compensation and other allowances beyond the date of departure from the host country. If the grantee has not yet departed from the US and if no mutually acceptable assignment can be arranged, payment will be made only for pre-departure orientation expenses incurred, and all other rights and obligations shall cease.

## **19 TERMINATION OF GRANTS**

The Commission reserves the right to revoke or terminate a Fulbright grant, subject to the approval of the US Department of State and the FFSB, and to withhold payment of allowances such as have not been paid on the date of termination should non-compliance with the provisions of the grant warrant such action.

Grounds upon which the Commission may revoke a grant include, but are not limited to, the following:

- Violation of the laws of the US or UK, including currency exchange regulations
- Violation of UK visa and immigration regulations
- Misconduct
- Engaging in any unlawful activity or that which may bring the Fulbright Programme into disrepute
- Engaging in unauthorised income-producing activities
- Abusive or disrespectful behaviour toward Commission staff
- Failure to submit the reports required by the Commission
- Failure to complete the grant
- Premature departure from the grantee's destination in the UK

If the grant is revoked or terminated on any of the above-mentioned grounds the grantee agrees to repay to the Commission all allowances and benefits received under the grant.

The FFSB also has authority to terminate a grant on either of the following grounds: that the grantee has exhausted all benefits of health and accident insurance provided to the grantee by the US Department of State in connection with the grant, and continued medical treatment would lead to the grantee's becoming a public charge, or that the grantee requires such protracted medical treatment that successful completion of the objectives of the grant is jeopardised.

The procedure for any such termination shall be the same as that provided for the termination of grants generally, except that the recommendation for such termination, supported by the corresponding factual information, shall be made by the US Department of State and not the host institution, Commission or co-operating agency (CIES/IIE).

## **20 GENERAL RESPONSIBILITIES**

Persons accepting a grant from the Commission under the Fulbright Programme are not by virtue thereof officials or employees of the Commission, of the US Department of State, or of any other agency of the Government of the US or UK. Grantees should avoid giving the impression that they are the official spokespeople of the Fulbright Programme, the US Government, the UK Government or of the Commission.

Nevertheless, grantees should remember that their home institution, the Fulbright Programme and their country may be judged by their actions and utterances, whether made in public or private. This also applies to online/social media, e.g. blogs, Facebook, Twitter (please also see section 22 – Publications).

## **21 REPORTS**

The Scholar is required to submit final reports. The grantees will be prompted by the CIES, at the end of the grant, to submit a final report through the Scholar Portal.

Grantees may also be required to deliver a formal presentation of their findings to the Fulbright Commission, the award sponsor (where applicable) and/or a relevant public body in the host and home countries.

In some instances, grantees may be selected to present about and share their Fulbright experiences informally, such as at Fulbright events, hosted meetings, and receptions.

### **21.1 PUBLIC DISSEMINATION**

Grantees are asked to conduct at least one public-facing event, such as a lecture, presentation, panel, present a paper or give a performance, at a location other than their host institution before the end of their grant period. This is an element of the Fulbright exchange programme, and one that seeks to widen the impact of the programme beyond the individual grantees and their host institutions. In special circumstances, where a public-facing event would be more impactful after the grant period completes but before the grantee departs the UK, the event may be arranged for after the end of the official grant period.

The Commission will promote these public-facing events so we must inform your Programme Manager of these talks.

Grantees should also arrange their own events, but will be advised of a couple of opportunities offered by partners of the US-UK Fulbright Commission.

## **22 TRAVEL OUTSIDE OF THE UNITED KINGDOM**

Grants are awarded for projects in the UK. The Commission allows travel of up to a maximum total of three weeks outside the UK (pro-rata, and not including weekends) without any deduction being made from the grant. If travel outside the UK is directly related to the project carried out under Fulbright, a waiver to leave the UK may be issued. Grantees should report any such travel plans to the Commission as early as possible, to ensure that their time is not counted as part of the allowed three weeks.

A grantee's absence from the host institution during term time without the host's agreement will result in a grant deduction unless the Commission, after consultation with the institution concerned, decides otherwise, for professional or compassionate reasons. Grantees are expected to remain in the UK until the date of termination of the grant period listed on the Fulbright Grant Authorisation Document.

The Commission must be informed of all plans for travel outside of the UK beforehand. This is important for our visa compliance process as well. All plans for early departure must be approved by the Commission.

Abuse of the travel entitlement may result in grant revocation.

## **23 PUBLICATIONS**

Grantees must acknowledge the US-UK Fulbright Commission and/or their Fulbright Award category in any publication and/or broadcast resulting from their visit to the United Kingdom under Fulbright auspices. A copy of any such publication/broadcast should be passed to the Fulbright Commission for permanent record.

Grantees who share their Fulbright experiences publicly via web-based media are responsible to acknowledge that theirs is not an official US Department of State website or blog, and that the views and information presented are their own and do not represent the Fulbright Programme or the US Department of State. Any grantee who posts inappropriate or offensive material on the Internet in relation to the Fulbright Programme may be subject to revocation or termination of their grant.

Grantees should conduct themselves appropriately when utilising social media during their grant period. Grantees may interact with Commission staff on platforms such as Facebook or Twitter, but official communication related to their Fulbright grant should always be made through the appropriate official Fulbright communication channels. Any inappropriate contact with staff via social networking sites will be brought to the attention of the Commission. Grantees should remember that their home institution, the Fulbright Programme and their country may be judged by their actions and utterances online.

## **24 EVALUATION AND COMPLAINTS POLICY**

The US-UK Fulbright Commission welcomes feedback on all of its awards, special programmes, services and events.

In addition to evaluation forms and interim and final reports (where applicable), the Commission welcomes written feedback from its scholars and programme participants, advisees and event attendees. All feedback is taken seriously.

Written reports shall be stored electronically after the grant period finishes and kept thereafter on the scholar/participants file.

Initial feedback may be submitted in any written form within 30 days of the grant period end date, programme conclusion, advising session or event and followed up accordingly. If the feedback is in effect a complaint that requires redress, then the following procedure should be followed:

### **24.1 COMPLAINTS PROCEDURE**

The Commission's complaints procedure will be conducted in writing. The Commission does not operate face-to-face or teleconferenced complaints meetings.

The purpose of the complaints procedure is to enable complaints to be dealt with as quickly as possible. This procedure applies to all scholars, programme participants, advisees or event attendees.

Complaints concerning participation in a programme or the arrangements of an award must be set out in writing and sent to the Director of the Fulbright Awards Programme. The Director will investigate as necessary and will respond in writing within 14 days.

Complaints concerning advising or an event must be set out in writing and sent to the Advising Director. The appropriate member of staff will investigate as necessary and respond within 14 days.

Following this investigation, if the person(s) bringing forth the complaint feel it has not been adequately dealt with, a summary of events up to that point and a copy of the original complaint should be raised in writing and sent to the Executive Director. The Executive Director will investigate as necessary and respond within 14 days.

If the complaint relates to the staff listed above, the complaint should be raised in writing to the Executive Director in the first instance.

Following investigation by the Executive Director, if the person(s) bringing forth the complaint feel it has not been adequately dealt with, the person may request the issue be tabled at the following Commissioners Board meeting. This request should be made to the Chairman who will bring it before the Board.

The Board of Commissioners will review all preceding written correspondence and come to a conclusion. Their decision will be final.

## **25 GENERAL INFORMATION**

**PASSPORTS:** Information regarding passports will be supplied by the cooperating agency (CIES or IIE). The grantee is personally responsible for obtaining a passport and should allow a minimum of four weeks for its preparation and issuance. The grant does not provide for expenses in connection with passports or photographs; therefore, such expense must be borne by the grantee, without recourse to claim for reimbursement.

**Questions concerning the issuance of passports should be addressed directly to: the Passport Office, Department of State, Washington DC.** Do not send communications on passport matters to the Commission or the cooperating agency.

**VISAS:** There have been recent, major changes to immigration policies for the UK. The Commission has guidance available as a courtesy for grantees as they apply for a Tier 5 visa to come in to the UK. The Fulbright Commission serves as the Tier 5 Visa sponsor for all grantees, but **grantees are ultimately responsible for following proper application, entry and exit procedure to and from the UK; applying for, and obtaining the necessary visas for their travel.** Grantees are required to abide by all UK immigration regulations throughout their stay in the United Kingdom whether under the auspices of the Fulbright Programme or otherwise.

For detailed information it is suggested that the grantee communicate with the nearest British Consulate, and refer to the [UK Immigration and Visas](http://www.ukimmigrationandvisas.gov.uk) website for relevant guidance documents and application-related materials.

**INCOME TAX:** The US Internal Revenue code of 1954, as amended, contains provisions affecting recipients of grants under the Fulbright Programme. Your attention is directed to Sections 117 and 6316 of the code relating respectively to scholarship and fellowship grants and to payment in foreign currency of tax obligations.

The United States Tax Reform Act of 1986 affects the exclusion which can be claimed for scholarships and fellowships granted after 16 August 1986 and Fulbright Graduate Students (if they are in any doubt regarding their liability for US tax on their grants) should check with the US Internal Revenue Service for details.

**The Fulbright Commission is not authorised to give out information on tax matters.**

Questions regarding US income tax matters, forms and publications can be addressed to the IRS: <http://www.irs.gov>.

**EQUAL OPPORTUNITIES:** The Fulbright Commission strives to operate a policy of equal opportunity and not discriminate against any person because of sex, race, disability, sexual orientation, religion or age.

**DATA PROTECTION:** The US-UK Fulbright Commission Privacy Policy and Consent Forms will be sent to you separately.