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## **800 U.S. TEACHERS**

### **810 GENERAL PROVISIONS**

#### **811 *Definitions***

##### **811.1 Teachers**

Teachers are persons employed full time in teaching, administration, or other related educational duties in accredited schools, as defined in Section 811.3.

##### **811.2 Seminar Participants**

Seminar participants are persons selected for participation in seminars or workshops specifically designed for teachers as defined in Section 811.1.

##### **811.3 Schools**

A school is an accredited institution that provides elementary, secondary or higher education.

### **820 SELECTION CRITERIA**

#### **821 *Personal Factors***

##### **821.1 Citizenship**

Candidates must be citizens and or nationals of the United States.

##### **821.2 Personal Factors**

Candidates will be considered without regard to race, color, religion, national origin, gender or age. Although the physical and mental health of candidates must be adequate to allow them to fulfill the terms of their grant, no qualified disabled candidate will, on the basis of disability, be subjected to discrimination.

##### **821.3 Adaptability**

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

The Bureau in consultation with the cooperating agency, is authorized to assess whether the applicant shows promise of being able to adjust successfully to life in the host country.

#### **821.4 Availability**

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

#### **821.5 Veterans**

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

#### **821.6 Financial Resources of Candidates on Home Salaries**

Candidates who will continue on home salaries for the duration of the grant must show evidence of having sufficient financial resources to support themselves and accompanying dependents during their exchange.

### **822 *Academic And Program Factors***

#### **822.1 Professional Excellence**

Candidates must demonstrate professional excellence as evidenced by academic achievements, excellence in teaching, and other qualities, and must meet the requirements of the host institution.

#### **822.2 Required Qualifications**

- a. Teachers must have at least a bachelor's degree and a minimum of three years of professional experience in a U.S. school or post-secondary institution, and must currently be employed full-time in a U.S. school or institution.
- b. Seminar participants must have two years of full-time teaching experience and must currently be either teaching or employed professionally in the field of study of the seminar.
- c. Grantees must have English language proficiency.

#### **822.3 Educational Background**

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

## **822.4 Host Country Considerations**

- a. Candidates must be acceptable to the country in which they propose to teach or be a seminar participant.
- b. Candidates must meet the general language requirements considered necessary for the teaching position or seminar and for adjustment to life in the host country.

## **822.5 Benefit to the United States**

A factor in the selection of grantees is the expected multiplier effect of the grantee's overseas experience.

In this context, consideration will be given to the expected benefit to the candidate's students and home institution in the United States.

## **822.6 Evaluation of Proposals**

A proposal shall be judged primarily on the basis of the candidate's proposed contribution to the objectives of the Fulbright Program, and not merely on the willingness of the institution abroad to receive the candidate.

Preference will be given to proposals which offer opportunity for broad contact with the young people of the host country and which meet the specific needs and interests of the host country.

## **823 Placement Factors**

### **823.1 Affiliation**

Each grantee will be affiliated with an educational institution abroad.

### **823.2 Criteria for Placement in U.S. Citizen-Sponsored Schools Abroad**

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

The following additional criteria shall pertain unless specific exceptions are made by the Board.  
The school

1. is nongovernmental, nonpolitical and nonprofit;
2. is situated so that it can be influential in the host country and region;
3. operates with the approval of the national government of the host country;

4. offers a course of study in the language, literature, geography, and history of the host country; and
5. is not connected with a church or a business enterprise.

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

### **823.3 Change of Placement**

Grantees should not change their institutional placement without prior approval from the Bureau and the Commission or post.

## **824 *Experience Abroad Factors***

### **824.1 Previous Experience Abroad**

- a. Because an objective of the Fulbright Program is to provide an educational exchange experience to those not previously afforded such an opportunity, preference will usually be given to candidates who have not had substantial recent experience abroad. The Board defines substantial recent experience as study, teaching, research or employment for a period aggregating more than an academic year (nine months) during the past five years.
- b. In certain contexts, the demands of the field may require that this preference be waived. Examples include difficulty of living and working conditions, required language fluency, and assignments for which recent experience abroad may be an asset.

### **824.2 Previous Fulbright Grants**

Where there is competition for grants, preference will be given to candidates who have not had previous Fulbright grants, especially within the past ten years.

However, candidates are eligible to apply for a second Fulbright grant or subsequent grants provided there is a three-year period between each grant.

The three-year rule does not apply to short-term grants of under two months.

When the prior grant was a Fulbright student grant, the above restrictions do not apply.

## **825 *Eligibility Factors***

### **825.1 Current Position**

Teachers eligible for the Teacher Exchange Program are persons employed full-time in teaching, administration, or other related educational activities in accredited elementary schools, secondary schools, junior colleges, community colleges or similar institutions. In addition, individuals employed by universities and other institutions of higher learning who are engaged in the field of education and/or teacher training are eligible; individuals employed by such institutions who are engaged in other disciplines may participate if a placement can be found.

## **825.2 Members of Same Family**

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

## **825.3 U.S. Government Employees**

Federal employees who meet other qualifications are eligible for grants.

## **825.4 Persons Serving on Cooperating Agency Screening and Other Advisory Committees**

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

## **825.5 Candidates in the Field of Religion**

- a. Teachers from parochial institutions where the primary emphasis is educational rather than ministerial or missionary are eligible for consideration in the regular application process.
- b. Religious workers, lay or ordained, are not eligible for consideration if their projects involve engaging in pastoral, missionary, or other professional religious activities.

## **826 *Ineligibility Factors***

### **826.1 Persons Associated with Specific Agencies and Members of their Families**

The following persons and groups are ineligible for grants:

- a. Employees of the U.S. Department of State, for a period ending one year following the termination of such employment.

This provision does not include part-time or temporary employees, consultants, and U.S. contract employees unless such persons perform services related to the Bureau exchange programs.

- b. Employees or members of the immediate families of employees of private and public agencies (excluding educational institutions) under contract to the U.S. Department of State to perform administrative or screening services on behalf of the Bureau's exchange

programs, for a period ending one year following the termination of their services with such agency, provided such employees have been directly engaged in performing services related to the exchange programs.

- c. Officers and employees of organizations in the U.S. or abroad, including members of boards of trustees or similar governing bodies which are responsible for nominating or selecting individuals for participation in the Bureau's exchange programs, for a period ending one year following the termination of their association with such organization.
- d. Members and staff of a Commission and members of their immediate families, for a period ending one year following the termination of their services with the Commission.
- e. Members of the Fulbright Scholarship Board, and members of their immediate families, for a period ending one year following the expiration of their service on the Board.
- f. Immediate families (i.e., spouses and dependent children) of individuals described in paragraph a, for a period ending one year following the termination of such employment. This provision does not disqualify self-supporting members of families who live apart from their parents.

## **826.2            Persons Arrested for, Indicted for, Charged with, or Convicted of a Felony or a Misdemeanor**

A candidate who, at the time of application, or at any subsequent time prior to becoming a grantee as defined in Section 838.1, has been convicted of commission of a felony or a misdemeanor (excluding minor traffic violations), must inform the cooperating agency, the Bureau, or the Board in writing of such fact. Similarly, a candidate who at the time of application, or at any subsequent time prior to becoming a grantee as defined in Section 838.1, has been arrested for, indicted for, or charged with a felony or a misdemeanor (excluding minor traffic violations), and the criminal matter has not been resolved, must inform the cooperating agency, the Bureau, or the Board in writing of such fact.

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

If the candidate is arrested for, indicted for, or charged with a felony or a misdemeanor, the application (and, if already made, the selection) may be suspended by the Board until the







### **837.1 Personal Reasons**

When serious and compelling reasons, such as personal illness, serious illness or death of an immediate member of the family, personal safety, natural disasters or other personal situations, make it impossible for a grantee to complete the grant period, the grantee will be permitted to resign from the grant with the concurrence of the Bureau, and the Commission or post. The Board recommends that a flexible policy on return travel benefits be followed so that grantees will not be penalized for circumstances beyond their control.

### **837.2 Other Reasons**

Resignation requests for causes other than those identified in Sections 837.1 above are to be reported to the Bureau for referral to the Board, which will decide on eligibility for return travel.

## **838 *Revocation, Termination And Suspension Of Grants***

### **838.1 Definitions**

- a. For the purpose of Section 826.2 and this Section 838, a “grantee” is defined as a selected candidate who has signed and accepted the grant document (including all terms and conditions thereof) without qualification and has returned a signed copy to the corresponding cooperating agency.

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

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

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

### **838.2 Authority to Recommend Revocation or Termination**

- a. The Commission or post, following consultation with the Bureau, has the authority to recommend that the Board revoke or terminate the grant held by a grantee who has departed the United States for the host country.

- b. The Bureau, following consultation with the Commission or post, has the authority to recommend that the Board revoke or terminate a grant to a grantee who has not yet departed the United States for the host country.
- c. The appropriate administrator at the school in which the exchange teacher has been placed, following consultation with the Commission, post, or cooperating agency, has the authority to recommend that the Board revoke or terminate a grant.

### **838.3 Grounds for Revocation or Termination**

In addition to the grounds specified in Section 826.2, grounds for revocation or termination include, but are not limited to: (1) violation of any law of the United States or the host country; (2) any act likely to give offense to the host country because it is contrary to the spirit of mutual understanding; (3) failure to observe satisfactory academic or professional standards; (4) physical or mental incapacitation; (5) engaging in any unauthorized income-producing activity; (6) failure to comply with the grant's terms and conditions; (7) material misrepresentation made by any grantee in a grant application form or grant document; (8) conduct which may have the effect of bringing the Department of State or the Fulbright Program into disrepute; (9) violation of the Policies of the J. William Fulbright Foreign Scholarship Board.

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

### **838.4 Procedure for Revocation or Termination**

- a. The procedure for revoking or terminating a grant when recommended by the Commission, post or Bureau is:
  - 1. The Commission, post, or cooperating agency consults initially with the Bureau of Educational and Cultural Affairs and the Staff Director of the Fulbright Scholarship Board;
  - 2. The Commission, post, or cooperating agency prepares a Statement of Fact and Recommendations for Specific Action by the Board and forwards them to the Staff Director;
  - 3. The Staff Director provides a copy of these documents to the grantee and obtains proof of delivery;
  - 4. The grantee sends a written reply to the Staff Director within two weeks of receipt of these documents. The Board may grant additional time for reply if

- circumstances warrant. The Staff Director will inform the Board if the grantee does not reply within the specified time;
5. The Staff Director provides a copy of all documents to the Commission, post, or cooperating agency for review and to the Bureau for review, evaluation, and recommendation;
  6. Following receipt of the Bureau's evaluation and recommended action, the Staff Director provides a copy of all relevant documents to the Board.

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

- b. The procedure for revocation or termination of a Fulbright exchange teacher when initiated by the host school administrative authority is as follows:
  1. Before taking action, the host school's administrative authority and the cooperating agency shall prepare a Statement of Fact and Recommendations for specific action;
    - a. The Statement of Fact and Recommendations shall include a clear and concise description of the facts and circumstances and must fully describe the corrective measures that have been taken to assist the grantee;
    - b. The host school administrative authority signs the Statement of Fact and Recommendations and provides a copy of these documents to the grantee, who must sign and acknowledge the date of receipt;
  2. The host school's administrative authority shall give the grantee one week to respond to the Statement of Fact and Recommendation;
  3. The host school sends all relevant documents to the Bureau;
  4. If after consultation with the Bureau, the host school determines that action needs to be taken, the school may terminate the grant and inform the grantee;
  5. The Bureau will inform the Board, the cooperating agency, and the Commission or post of the host school's decision expeditiously and in writing.

### **838.5 Procedure for Termination of a Matched Grant**

If an exchange teacher resigns or is terminated, pursuant to Sections 837 and 838, and returns to his/her home country, the Bureau may find it necessary to terminate the grant held by the matched exchange partner. Whenever possible, the Bureau will take steps to avoid canceling the grant of the matched exchange partner. If these efforts are unsuccessful the matched exchange teacher must return to his/her home country.

### **838.6 Financial Issues Related to Revocation, Termination and Suspension**

Unless otherwise specified by the Board, when a grant is suspended, revoked or terminated, disbursement of any allowances and benefits will cease, except for return travel, and medical benefits that may be authorized under the Bureau's accident and sickness program for exchanges;

the grantee will also be required to immediately repay any advances in allowances or benefits disbursed for use in the period of time after the suspension, revocation or termination. Unless otherwise authorized by the Board, Bureau, Commission or post, no further claim for disbursements of allowances or benefits will be honored. This provision shall not apply to grants which are suspended because conditions in the host country require the departure of grantees for reasons of personal safety; in such instances, Section 836 applies.

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

### **838.7            Suspension**

a. The Board, at the recommendation of a Commission or post may suspend a grant pending the procedure for revocation or termination of the grant, or if the grantee is arrested for, indicted for, charged with, or convicted of commission of a crime, either before or after the grantee's departure from the United States, in accordance with Section 826.2.

b. The Commission or post may suspend a grant:

1. if the grantee ceases to carry out the project during the grant period;
2. if the grantee leaves the host country for more than two weeks without the prior authorization of the Commission or post;
3. if conditions in the host country require the departure of grantees for reasons of personal safety (see Section 836).

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

### **838.8            Persons Arrested for, Indicted for, Charged with, or Convicted of a Felony or a Misdemeanor**

The provisions of this Section 838 are in addition to the provisions of Section 826.2 regarding the suspension, termination, or revocation of grants to persons arrested for, indicted for, charged with, or convicted of a felony or a misdemeanor.

### **838.9            Notification**

The cooperating agency will include Section 826, Section 831, this Section 838, and Section 839 in the grant document for signature and acceptance by the selected candidate.



## **841.2 Grant Benefits for Teachers Not on Home Salaries, etc.**

Grantees not covered by Section 841.1 may receive a monthly stipend and a travel allowance.

The monthly stipend covers living costs in the host country. Grantees with accompanying dependents may also receive a dependent supplement (see Section 841.3).

The travel allowance covers round-trip transportation from a grantee's home to the place within the host country where the grantee will teach.

All airline tickets purchased using U.S. Government money must comply with the Fly America Act.

In addition, the grantee may receive an excess baggage allowance, as well as special allowances for books, materials, language instruction and local travel as well as other benefits required by local conditions.

A grant may also include, where applicable, funds for predeparture orientation.

## **841.3 Dependent Supplements**

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

Grantees covered by Section 841.2 who have accompanying dependents may receive an adjustment to their stipend, with a fixed additional amount for each dependent.

In addition, the grantee may receive an educational allowance for accompanying dependent children in grades Kindergarten through 12th grade (see Section 841.6).

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

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

## **841.4 Health and Accident Insurance**

- a. The Bureau provides all grantees with supplemental health and accident insurance during pre-departure orientation, direct travel time to the host country, while participating in grant activities abroad, and while directly en route back to the United States. This insurance is not intended to replace the grantee's normal insurance policy, which should be maintained during the grant period.
- b. In the case of a medical emergency, grantees may also request special emergency assistance not provided by the health and accident insurance policy.
- c. Grantees must provide insurance protection for their dependents at their own expense.
- d. It is recommended that the grantee obtain adequate insurance for personal property.
- e. Neither the Board, the U.S. Department of State, nor the Commission or post assumes responsibility for any injury, accident, or illness (except as may be covered by any supplemental health and accident insurance provided under Section 841.4) any loss of personal property, or any other contingency which may befall the grantee or accompanying dependents during, or as a result of, the grantee's stay abroad, travel or other activities related to the grant.

### **841.5 Other Allowances**

Grantees may receive an incidental allowance for the purchase of supplies and equipment and for other expenses deemed necessary by the Commission or post to the successful realization of the grantee's project, such as reference books, journals, office supplies (not including furniture), educational materials (e.g., maps, compact discs, tapes, films, slides, photographs), electronic equipment, secretarial services and limited translation services, limited publishing costs, and local travel essential to the completion of the project.

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

### **841.6 Dependent Education Allowance**

The Bureau will administer a program to provide educational allowances for school-age dependent children in certain non-commission countries. The purpose of this allowance is to permit accompanying dependent children to attend an English language school in the host country.

Commissions are encouraged, where appropriate, to provide such an allowance to grantees to their countries.

### **842 *Grants To Two Members Of The Same Family***

- a. When two members of the same family receive grants but both will constitute a single household abroad, each will receive the allowance normally given a single grantee.



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

#### **844.2 Honoraria and Consulting or Other Fees Received Abroad**

- a. Any honoraria or other fees received abroad for special guest lectures or similar events during the grant period may be accepted by the grantee, subject to the concurrence of the sponsoring Commission or post. The grantee should inform the Commission or post of any such offer.
- b. Grantees invited by Commissions or posts to lecture or consult in other countries during the grant period may receive travel expenses and per diem, but not honoraria, from Commissions or posts in those countries.
- c. Grantees may accept fees or other remuneration for work related to the Fulbright grant during the grant period provided such work does not conflict with the responsibilities under the grant.

#### **844.3 U.S. Government Employees**

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

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

#### **844.4 Sabbatical Leave**

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

#### **844.5 Federal Retirees**

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

## **850 INCOME TAX LIABILITY**

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

## **860 RESPONSIBILITIES AND RIGHTS OF GRANTEEES**

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

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

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

## **870 PUBLICATIONS RESULTING FROM GRANT**

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