

PROJECT OBJECTIVES, GOALS, AND IMPLEMENTATION (POGI)

FY 2026 Study of the U.S. Institutes for Scholars

Funding Opportunity Number: DFOP0017918

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 for the FY 2026 Study of the U.S. Institutes for Scholars (SUSIs for Scholars). Proposals must conform to the solicitation, the guidelines in this document, and the standard Proposal Submission Instructions (PSI). Any application not adhering to these conditions may be deemed technically ineligible.

These guidelines are **in addition to** the requirements outlined in the solicitation and PSI. In the event of a discrepancy between documents, the NOFO takes precedence.

I. STATEMENT OF WORK

Recipient Responsibilities:

The recipient organization will be responsible for the following:

1. Provide overall coordination and management of the SUSIs for Scholars;
2. Design and oversee three SUSIs for Scholars academic programs in the United States for approximately five weeks each. Each SUSI for Scholars will include approximately 18 participants at a U.S. college or university campus for a total of approximately 54 foreign participants;
3. Provide and monitor subawards to selected educational institutions to conduct the SUSIs for Scholars. Each subawardee should not conduct more

than one SUSI for Scholars, and the recipient may choose to conduct only **one** SUSI for Scholars;

4. Oversee the program curriculum and other activities for all three SUSIs for Scholars, ensuring that they align with program goals and objectives;
5. Prepare DS-2019 forms for all participants and send these forms to the U.S. embassy or consulate well in advance of program start dates to allow for J-1 visa interview scheduling;
6. Enroll participants in ECA's health benefits program, Accident and Sickness Program for Exchanges (ASPE), and/or other health benefits plan as directed by ECA for the duration of the SUSIs for Scholars and issue health benefits identification cards for each participant;
7. Ensure that each participant completes and signs all required pre-program forms provided by ECA;
8. Develop health and safety protocols to protect the welfare of all participants;
9. In coordination with U.S. embassies and consulates or Fulbright commissions, arrange and purchase international round-trip travel for participants;
10. In coordination with U.S. embassies and consulates or Fulbright commissions, arrange and purchase any pre-program travel related to visa issuance;
11. In conjunction with subawardees, U.S. embassies and consulates, and Fulbright commissions, make logistical and administrative arrangements for participants, such as pre-departure information, airport pick-up and drop-off, lodging and meals, domestic travel, medical treatment, and program funds disbursement including travel allowances; communicate this information to participants prior to the program start date;
12. Promptly inform ECA of any serious incidents or issues involving participants that may affect their participation in the program (including, but not limited to, medical emergencies and medical evacuations, including mental and physical health issues; natural disasters; arrests or other serious legal issues or misconduct accusations). Consult with ECA on the response to any serious incidents and on crisis management decision-making and operations, including responding to queries from the media or others. Provide timely progress reports on any necessary follow-up action;

13. Ensure strict compliance with State Department branding and signage requirements at events, in remarks, in program documentation, and in online content;
14. Provide participants with follow-on guidance and resources and facilitate continued interaction among participants after the program;
15. Create and maintain a database of program alumni that includes alumni success stories; share these stories with ECA throughout the year;
16. Conduct program performance monitoring and evaluation according to the MODE framework requirements as outlined in section C.5. Program Performance Monitoring and Evaluation (M&E) of the NOFO;
17. Manage and distribute ECA funds for this activity;
18. Submit required annual and final financial and program reports to ECA on time and provide weekly updates to the program office during the implementation period;
19. Provide reasonable accommodations for participant needs, including disabilities and medical or dietary restrictions, as necessary;
20. Prepare and print certificates of completion for participants who successfully complete their respective programs; and
21. Assume overall responsibility for complying with all applicable tax treaties and Federal, state, and local laws on tax withholding and reporting for participants.

II. PROGRAM SPECIFIC GUIDELINES

A. Overview

The U.S. Department of State's Bureau of Educational and Cultural Affairs (ECA) invites proposal submissions for the design and implementation of three SUSIs for Scholars.

Proposals should present a rigorous academic residency and integrated academic field experience. The NOFO for this competition gives further direction on the substance of the program and the themes. The conception and structure of the SUSIs for Scholars are the responsibility of the award recipient. It is essential that proposals provide a full, detailed, and comprehensive narrative describing how the recipient and subawardees will achieve the objectives of the program. Proposals

will be reviewed based on the review criteria listed in the NOFO.

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

B. Program Dates

Pending the availability of funds, the anticipated award for the cooperative agreement will begin on or about September 1, 2026, and end on or about December 31, 2030, including two award renewals in FY 2027 and FY 2028, subject to satisfactory implementation of this program and availability of funds. Each SUSI should last approximately 36 days (including arrival and departure days). Three SUSIs for Scholars will take place in summer 2027. SUSIs can begin and end on different dates. SUSIs should begin no earlier than June 1, 2027, and end no later than August 31, 2027.

C. Program Administration

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

The award recipient must designate a qualified project director to oversee all of the SUSIs for Scholars. The proposed project director must demonstrate relevant past experience that would contribute to their roles of coordinating logistical and administrative arrangements, ensuring an appropriate level of continuity and consistency, overseeing alumni programming, and serving as the principal liaison between ECA and the subawardees. The project director will serve as ECA's primary point of contact. The project director should plan to attend a partner retreat that will take place either virtually or in-person in Washington, DC, at least seven weeks before the start of the program.

The award recipient must designate a qualified academic director based at each subawardee (and at the recipient organization, if applicable) who will be in-person for the entire SUSI to ensure the continuity, coherence, and integration of all aspects of the academic program, including the academic field experience. The proposed academic directors must demonstrate relevant past experience for their role in program planning and implementation, day-to-day oversight, and participant monitoring. In addition, a qualified administrative director or coordinator must be identified at each subawardee (and at the recipient organization, if applicable) to oversee all administrative support services. Proposed administrative directors must demonstrate relevant past experience for their role in managing participant supervision, participant health and safety, budgets, logistics, reporting, and other administrative arrangements.

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

D. Participants

Each SUSI will include approximately 18 foreign university faculty, industry experts, practitioners, private sector leaders, policy makers, and those within academic or professional settings, in alignment with the program objectives. Their professional assignments will require significant knowledge of their field of U.S. studies. Participants will represent all regions of the world and will be proficient in English. They will be seeking to increase their knowledge of the United States to enhance their expertise and scholarship and to improve courses they may teach on the United States in universities and other educational, training, and research institutions abroad.

Participants will be varied in terms of age, professional position, and experience abroad. In all cases, participants will be accomplished educators, scholars, or practitioners who will be prepared to engage in an intellectually rigorous academic seminar that offers a collegial atmosphere conducive to the exchange of ideas.

ECA is committed to ensuring that participants with disabilities are able to engage fully in the program through reasonable accommodation and support. The award recipient will be responsible for working with the subawardees to provide reasonable accommodations that will allow for a full experience for all participants. The award recipient will NOT participate in candidate selection. ECA will send the final list of participants for each SUSI to the award recipient.

E. Program

Each SUSI should include an approximately four-week academic residency at a U.S. college or university campus and an approximately one-week academic field experience. Applicants are encouraged to draw upon any unique institutional strengths through faculty and other resources. The selected themes are Critical Minerals, Digital Transformation, and Economics and Business.

SUSIs for Scholars should include topics on U.S. history, government, institutions, and society. Proposed activities should highlight American excellence and society and should be woven into academic sessions on program themes and cultural activities, including Independence Day celebrations.

Academic Residency

The Academic Residency component should:

- Be a custom-designed and well-integrated seminar that imaginatively combines lectures, panels, seminar discussions, readings, debates, site visits, and regional travel into a substantive, cohesive, and coherent program.
- Be tailored for SUSIs for Scholars and not replicate an existing lecture course, survey, or graduate seminar designed for American degree candidates.
- Provide participants with a multi-dimensional view of U.S. society and institutions. Presenters should include outstanding scholars and other relevant professionals outside the SUSI staff such as experts from government, educational institutions, the media, think tanks, professional and cultural organizations, and community and civic groups. The recipient should seek to

maximize interaction between participants and presenters both during and outside of each classroom session. Separate budget items (e.g., honorarium, per diem, travel) may be included for this purpose, per the attached sample budget.

- Provide participants with a formal opportunity early in the program to present or discuss their own research or teaching interests, work environments, and/or other educational issues in their home countries. The audience for these discussions could include other participants, SUSI faculty, American peers, program presenters, and other members of the local community.
- Include time for a collegial exchange of views among participants, lecturers, and panelists. Discussion should be encouraged not only through question-and-answer sessions but also through organized debates, roundtables, and other fora that allow active engagement between participants and presenters.
- Include excursions to historical sites, schools, and other places of interest that will reinforce the academic curriculum and deepen participants' understanding, appreciation, and desire to partner with the United States.

Academic Field Experience

The field experience for each SUSI should:

- Directly complement and reinforce the academic residency of each SUSI.
- Be arranged and led by the academic director and principal staff.
- Be approximately one week long. It should expose the participants to a U.S. region distinct from that of their academic residency. If appropriate, the academic field experience segment may be interspersed with the academic residency, though the total time allotted for the academic field experience should be approximately seven days.
- Include an appropriate mix of professional-level meetings relevant to the SUSI's objectives, visits to cultural institutions, and recreational activities.

The proposal must specify the proposed academic field experience location or other destinations to be visited, as well as specific sites. Please note, staff escorts travelling on the academic field experience must have demonstrated qualifications to accompany exchange visitors, such as experience working with international audiences; accompanying international or domestic group travel; and/or managing health, safety, and emergency situations during travel.

Please note: The Office of Academic Exchange Programs may request that the award recipient modify the academic residency and/or academic field experience to protect the health, safety, or well-being of participants. Similarly, the award recipient, in consultation with the Office of Academic Exchange Programs, may also wish to make program modifications. Any requested changes must remain within the scope of the original program objectives.

F. Independent Research and Free Time

Each SUSI should provide opportunities for limited but well-directed independent research. Participants should have up to a half day per week (excluding weekends) to pursue individual research interests, curriculum development projects, or to catch up on assigned readings. Faculty from departments related to the participants' scholarly interests should be available to offer advice on their individual research projects, to help facilitate their access to resources, and act as peer collaborators as appropriate. Given the intensive SUSI schedule, participants will be made aware that opportunities for research will be limited.

Participants should have sufficient free time outside the academic sessions to develop connections with American counterparts and community partners. Participants should also have opportunities to attend cultural events, such as concerts or sporting events.

G. Logistical Considerations

- **Participant health and safety** is an ECA priority. The recipient should consider the health, safety, and welfare of participants at all times. This includes assisting participants to understand the ECA-sponsored ASPE health benefits program and to navigate the complex healthcare system in the United States. The recipient and any sub-recipients should also help participants understand and navigate any national, state, local, and campus health or safety policies.
- **Housing and meal arrangements** are an important dimension of program planning and must be discussed in detail in the proposal. In general,

participants should be housed on campus in university dorms, similar designated university housing, or other suitable locations, ideally within walking distance to daily classes. Each participant should have a private bedroom during the academic residency portion, and bathrooms should not be shared among more than three participants. Accommodations should respect each participant's privacy and be conducive to study. Participants would ideally have access to kitchen facilities, either in their own rooms or in a common room. A cafeteria meal plan combined with a cash allowance for food that will permit participants to cook or eat at local restaurants is strongly recommended. SUSI staff should consider any dietary, religious, medical, or living requirements and be prepared to discuss any challenges with the participants. SUSI staff should consider conducting a pre-arrival survey of participant dietary and/or religious needs to better accommodate their needs. To the extent permitted by budget limitations, participants should receive up to the U.S. government per diem rate for meals and incidental expenses at the various program locales. See <http://www.gsa.gov/perdiem> for current U.S. government per diem rates.

- **Participant forms** are required from each participant. Required forms include, but are not limited to, the SUSI terms and conditions, a medical form, and a media release form. The recipient is responsible for disbursing and collecting signed forms from participants. The recipient should notify ECA of any potential concerns or issues. All forms should be safeguarded since they contain Personally Identifiable Information (PII).
- **Virtual pre-departure orientation (PDO) workshops** should be organized by the recipient for all participants to prepare for the program. Topics may include, but are not limited to: setting expectations, U.S. cultural norms, cross-cultural adjustment, health and safety guidelines and practices, and logistics. Pre-departure materials should be available to participants online or emailed at least six weeks before the start of the program.
- An **administrative orientation** to the United States and to the campus for the participants should address administrative details of the program, identify campus and local resources, review safety and security procedures, and provide general information that will facilitate the participants' adjustment to daily life in a new environment. Important topics will be

campus safety and general security tips, medical issues and protocols, transportation, per diem, and availability of foods to which participants are accustomed or that meet specific dietary requirements.

- An **academic orientation** should provide participants with a concise overview of the program, including principal objectives and major themes. The academic director should discuss guidelines for behavior that encourage active participation, respect for the views of other participants, concise comments and questions that keep the scholars on-topic, and other parameters that will promote effective discussion throughout the program.
- **Opening and closing events** (e.g., luncheon, dinner, or reception) should formally inaugurate and close the program. These events typically include representatives from the SUSI staff as well as individuals from the larger community.
- **Access to resources** should be arranged, including campus libraries, computer and internet facilities, gymnasium or fitness center, health services, on-campus disability resources, counseling services, and local and national newspapers, periodicals, radio, and television. Program implementers should conduct a formal orientation to university library services during the first week of the program and should provide participants with computer training and technical support, as needed.
- **Monitoring and evaluation** should be conducted according to the MODE framework requirements as outlined in section C5. Program Performance Monitoring and Evaluation (M&E) of the NOFO. The recipient should ensure participants have time reserved to complete required survey(s). Copies of surveys should be available to the ECA program officer upon request. Additionally, the recipient will be responsible for collecting alumni success stories to share with the ECA program office.
- **Travel allowances** should be disbursed to each participant to support in-transit costs incurred during travel to and from the United States, including visa travel. The ECA program office suggests approximately \$125 per participant roundtrip for visa travel and incoming/outgoing allowances. Potential costs include accommodations, visa travel per diem, transit fares, or baggage fees.

H. Alumni Outreach/Follow-on Activities

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

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

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

III. PROPOSAL CONTENTS

Applicants must submit a complete and thorough proposal that addresses the program's objectives and requirements. Proposals should be clear, concise, and responsive to the criteria outlined in the solicitation and PSI.

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.

All budget guidelines must be followed. The budget should indicate any cost sharing in the form of in-kind or cash contributions to the program from sources other than the U.S. Department of State. See PSI in the Solicitation Package for

information on cost sharing and the cost of audits.

Applicants are not required to use the budget template provided in the solicitation package; however, the applicant should provide an Excel spreadsheet with a budget categories tab and a separate detailed budget tab. The applicant should also review the budget guidelines tab in the template. If applicable, separate budgets for sub-awardees should be included and should resemble the Detailed Budget Template for the applicant. You are urged to be as detailed and specific as possible, adding line items if needed. You may wish to include any of the listed allowable costs.

Allowable program costs include, but are not limited to:

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

- Communications (e.g., participant cell phones or SIM cards);
- Health benefits, if necessary;
- Medical costs such as medically required quarantine (outside of medical facilities covered under the health benefits provider);
- Reasonable accommodations (at least \$2,000 per SUSI);
- Travel costs for partner retreat in Washington, DC;
- Sub-award costs, if applicable; and
- Indirect costs.

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

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

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

- If you do not have an established negotiated indirect cost rate agreement (NICRA), please explain what costs are excluded when calculating the Modified Total Direct Costs (MTDC) base in accordance with 2 CFR 200.68 Modified Total Direct Cost (MTDC) and 2 CFR 200.414 Indirect (F&A) Cost.
- List and explain the participant support costs.

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

IV. OTHER AWARD INFORMATION

Adherence To All Regulations Governing The J Visa

Proposals must demonstrate the applicant's capacity to meet all requirements governing the administration of Exchange Visitor (J) Programs as outlined in **22 CFR 62**. For more information, visit <http://j1visa.state.gov>.

V. APPLICATION SUBMISSION

The solicitation document specifies the deadline and method for proposal submission. **There are NO EXCEPTIONS to this deadline.**

(END)