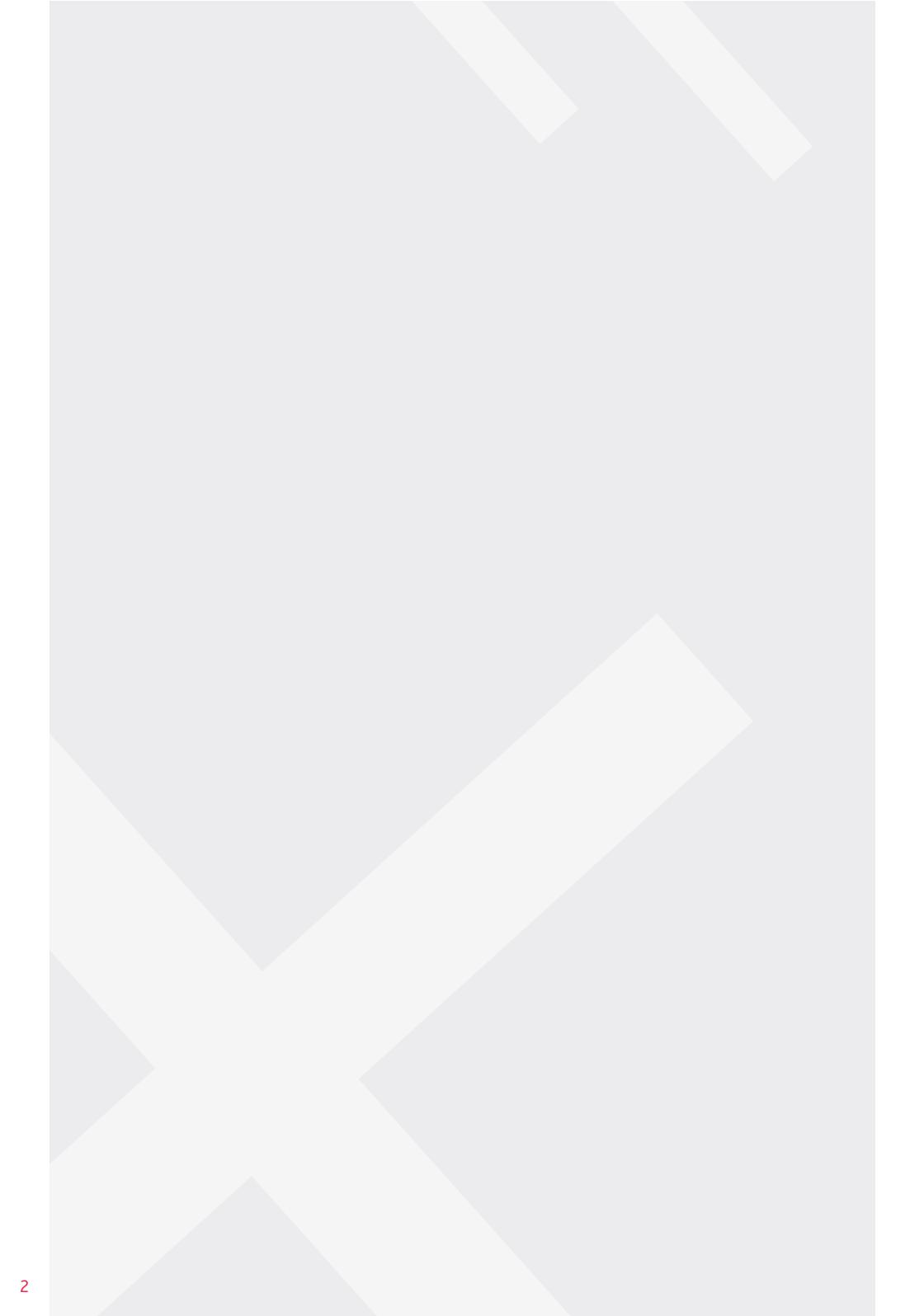




Marshall  
Scholarships

Marshall Scholarship Handbook  
2020



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# Foreword

All of us at the Marshall Aid Commemoration Commission offer a warm welcome to those who have been awarded Scholarships in the United Kingdom.

We hope that your stay will be a success and that you will enjoy it. This handbook contains some general information, explains the arrangements under the scheme and sets out some rules.

We hope that it will be useful.

A handwritten signature in black ink that reads "Christopher Fisher". The signature is written in a cursive style with a large initial 'C'.

Christopher Fisher

Chair

Marshall Aid Commemoration Commission

June 2020



# The Marshall Aid Commemoration Commission

As at 1 August 2020

## **Chair**

Mr Christopher Fisher

## **Members**

Mr Alan Bookbinder

Prof Judith Buchanan

Mr Adrian Greer

Mrs Suzanne McCarthy

Dr Alice Prochaska

Prof Adam Smith

Dr Leslie Vinjamuri

Ms Xenia Wickett

Lord Wood of Anfield

## **Executive Secretary**

Ms Caroline Harrison

## **Assistant Secretary and Head of Scholarship Administration**

Ms Mary C Denyer

## **Programme Administrator**

Ms Helen Ullock

## **Scholarships Assistant**

Ms Anna Gane

# Administration

The Marshall Aid Commemoration Commission is the body appointed by Act of Parliament to supervise the operation of the Marshall Scholarships. The Commission gives general directions and the day-to-day administrative work is undertaken by the Association of Commonwealth Universities (ACU). The ACU provides the secretariat and is responsible for all aspects of the award, assisting the Commission with securing places for Scholars in a university, college, or other institution of higher education, and with the supervision of their studies. They also administer the orientation, make payments and advise on accommodation as well as look after the welfare of the Scholars and their families.

The regulations in this handbook apply to holders of Marshall Scholarships. They supersede those in previous editions and are applicable to all Scholars from the time of publication. All Scholars should therefore read this handbook, however long they may have held their Scholarships. Regulations may be changed without notice during the term of a Marshall Scholarship.

This handbook explains the regulations for the administration of Marshall Scholarships in the United Kingdom.

The handbook provides general guidelines only and is not exhaustive. Scholars and their supervisors are asked always to check with the Marshall Commission after consulting the handbook, about specific issues. Your Notification of Award will detail any conditions applicable specifically in your case.

For all matters, you should refer to:

Marshall Aid Commemoration Commission

C/o ACU

Woburn House

20–24 Tavistock Square

London WC1H 9HF

Telephone: +44 (0)20 7380 6703 / 6704

E-mail: [Info@marshallscholarship.org](mailto:Info@marshallscholarship.org)

Web: [www.marshallscholarship.org](http://www.marshallscholarship.org)

# Travel to the United Kingdom

## Travel Arrangements

- 1 Scholars will travel to the UK individually or in small groups. Proposed travel dates will be sent to Scholars as soon as these have been arranged. Scholars should be aware that travel dates are subject to change, and must be prepared to travel earlier or later than the initial proposed date.
- 2 Fares for Marshall Scholars will be paid from their place of residence in the United States to their university in the United Kingdom. The fares will cover economy class air travel in the United States, economy class transatlantic air fares and taxis will be arranged for airport pick up in the United Kingdom. No other expenses of travel can be met. Scholars are not debarred from travelling by other means or at other rates to take up their award, but no reimbursement can exceed the actual amount expended, nor the equivalent of the cost of the passages described above, whichever is the lesser value.

## Travel Expenses

- 3 Transportation of baggage within the United States is the Scholars' own responsibility, as is the cost of any insurance coverage. The Commission stresses the importance of taking out adequate personal and baggage insurance while in transit from home in the United States to destination in the United Kingdom. Coverage costs must be paid by the Scholars before departure and the Commission will not at any time be involved in any way with Scholars' insurances.
- 4 Accompanied baggage. The free allowance on transatlantic flights is usually one piece of checked baggage, weighing up to 50 lbs (23 kg). The maximum dimensions of checked baggage must not exceed 35.5 x 29.5 x 16 inches (length x width x depth). You should check with the particular airline before flying as weight allowances and dimensions can vary. Excess baggage charges will be the responsibility of the individual. As these are high, Scholars are strongly advised to make every effort to keep within the free allowance and to make use of the container service for their heavy baggage (see below). Scholars wishing to bring with them any electrical equipment are advised to check the security regulations with the appropriate airline nearer the time, since these may be subject to change.
- 5 Unaccompanied baggage. The Commission will pay for up to 250 lbs of a Scholar's unaccompanied baggage sent by container ship from New York in accordance with the agreements made by it for that purpose. The weight of the consignment will be determined by actual gross weight or 12 lbs per cu. ft., whichever is the greater. Arrangements have been made with Agility Logistics in the UK and Agility US, for the Marshall Scholars' baggage to be shipped by container as one consignment. The Commission will pay up to \$150 for costs towards getting your baggage to New York. You must keep receipts for reimbursement. If a Scholar prefers to make independent arrangements for transportation of baggage to Britain, this will be in order, but the Commission will not then be involved in any way; repayment of the costs will be arranged on arrival in the UK, on presentation of receipts, and Scholars will be able to claim up to \$400. Baggage in excess of the 250 lbs mentioned above may be included in the container but individual consignments will be weighed and the charge for any excess will be payable by the Scholar direct. These charges are generally high and failure to pay the additional costs before departure may lead to delays in delivery of the baggage in the UK. Further information will be provided by the Commission.

- 6 The Commission cannot accept responsibility for accidents on the journey or for the loss of luggage, wherever or however these may occur. You are therefore advised to insure, at your own expense, both your luggage and that of any dependants.

### **Dependants' Fares**

- 7 The Commission has discretion to pay the fares of the families of married Scholars and to offer the same shipping allowance as the Scholar allowance for unaccompanied baggage across the Atlantic.

### **Documentation: Entry Clearance and Biometric Residence Permits**

- 8 All US citizens entering the UK as students who wish to stay for six months or longer need to apply for Entry Clearance, as do their dependants. This means that all Marshall Scholars must apply for Entry Clearance before they arrive in the UK. Scholars will be provided with full and detailed instructions on how to complete the application for Entry Clearance and should wait to receive these, along with official documents from the Marshall Secretariat, before making an application.

Scholars do not need to pay an application fee for this Entry Clearance. However, to have the documents returned to them Scholars must provide a fully addressed prepaid electronic shipping label (no ground services and no non-electronic waybills). Only UPS electronic waybills will be accepted. Waybills purchased from other providers will not be accepted.

The online application for the Entry Clearance can be found at: <https://visas-immigration.service.gov.uk/product/uk-visit-visa>

Marshall Scholars will be exempt from paying the Immigration Health Surcharge which has been introduced as part of the application for Entry Clearance.

Scholars should register for an account and complete the Entry Clearance application form according to the application guidance provided by the Marshall Office. On completion of this form they will be directed to make an appointment, in person, at a local office to submit biometric data (finger scan and digital photograph). Following this appointment, the items listed below should be sent to the UKVI Scanning Hub in New York, for the attention of:

**VFS Services USA Inc.**

**UKVI Scanning Hub**

**145 West 45th St**

**Floor 5**

**New York NY**

**10036**

The following documents will need to be supplied in original form or as certified copies:

- Passport (note: It must be the original document and have ample validity with at least one page blank on both sides)
- Two passport size photographs (45mm x 35mm; see guidance notes provided by the Marshall Office)
- Printed Copy of Entry Clearance application form
- Confirmation of Acceptance of Study (CAS). This is a number issued by the UK institution
- Confirmation of funding letter from the Marshall Commission with CAS number printed on it.
- Pre-paid electronic shipping label purchased from UPS for the return of your passport and supporting documents with a US address for return

On receipt of the returned passport, Scholars must send a copy of the Entry Clearance Vignette, the full decision letter and the photograph page of the passport to the Marshall Commission immediately.

**The new Entry Clearance (vignette), which will be pasted into the passport, will be valid for 90 days only.** This 90 days will start from the date that you entered on your application form as the date that you intend to travel to the UK (or from the date that your visa is issued, if this is after your intended travel date). **If the start date on your vignette is later than the date of travel to the UK, you must inform the Marshall Office immediately as you will be unable to travel to the UK before the date printed on your vignette.** If you do not travel to the UK during the 90 day period then your vignette will expire and you will need to apply for another 90-day vignette if you still wish to travel to the UK. You will have to pay a fee for this new application and provide your biometric information again, but you will not have to submit a new Tier 4 application.

Your 90-day vignette will be accompanied by a letter. When you enter the UK you should show the border force officer your 90-day vignette and this letter.

You must collect a **biometric residence permit (BRP)** from a post office, or from your university, within ten days of arriving in the UK or before the end date on your vignette whichever is sooner. When you complete your application for Entry Clearance the form will give you a choice of post offices, or a location at your university from which to collect your BRP.

The letter that accompanies your 90-day vignette will contain the details of the post office that you selected in your application. If you change your mind and would like to collect your BRP from a different post office then you will have to pay a fee.

You do not have to make an appointment at the post office but you must take your 90-day vignette and your letter with you. If you do not collect your BRP within ten days of arriving in the UK you may have to pay a fine and/or your visa may be cancelled.

The Home Office have confirmed that Tier 4 students are allowed to enrol at their institution using their 90-day vignette and letter. However, if you do this you will have to show your institution your BRP before the expiry of your 90-day vignette. You may therefore find it easier to collect your BRP before you enrol at your institution, if you are able to do so.

**You are advised not to travel outside of the UK until you have collected your BRP.**

BRPs must be stamped for the full duration of your initial course of study. If not you will be personally responsible for applying for any extension of stay. You should send a copy of the BRP to the Marshall Office as soon as you have collected it.

### **Arrival Expenses**

- 9 Scholars should carry with them sufficient United Kingdom currency to meet the expenses arising immediately on arrival. A sum of £200 should be sufficient. Scholars will receive a minimum of two weeks' stipend on a Mastercard Cash Passport (which is a credit card) which will be sent to them before they leave for the UK. These funds will be loaded on the card on the day you arrive in the UK.

# Arrival

- 10 Scholars will not be met in person by the Secretariat in 2020. Arrangements will be made for Marshall Scholars to travel directly to their place of residence upon arrival in the UK.
- 11 Upon arrival you will receive your welcome package electronically including a registration form. Please complete this and return it to the Marshall Commission as soon as you can confirm the details required.

## Banking

- 12 Marshall Scholars will need to open a current bank account. A BACS form will be sent to you via email and you should complete it with details of your bank account, sign it and return it to the Commission as soon as possible. This will allow the Marshall Commission to make money transfers to your UK account.

Services available to international students have become more limited in recent years and Scholars should check with each bank on arrival in the UK for up-to-date information on the kind of accounts and benefits you will be eligible for. Most banks will need to see the following before they will open an account for you: passport; official Marshall Award Letter; previous U.S. bank statements (at least three months' worth); a letter from the UK University confirming that you are a student; and a document confirming your address in the UK. Some banks will require these latter two pieces of documentation to be specifically addressed to them.

Because it can take at least a week to open a bank account in the UK Scholars should ensure that they have access to money to cover living expenses during this period by making financial arrangements similar to those they might make as tourists (i.e. your US credit card or ATM card).

For further information, visit <http://www.ukcisa.org.uk/Information--Advice/Living-in-the-UK/Opening-a-bank-account>

If you face any difficulties with this process, you should contact the Assistant Secretary or Programme Administrator without delay. It is very important that you inform the Programme Administrator about any changes to your bank account details. If you decide to change your bank account, you must provide the new details to the Programme Administrator as soon as possible. You must keep your old account open until your stipend is credited to your new account. If you do not keep your old account open, there may be a delay in receiving any allowances paid during this period.

# Accommodation

- 13 Before your arrival in the United Kingdom you should seek advice about accommodation from the Accommodation Officer at the university or institution where you are to study, and the Marshall Commission. The Marshall Commission strongly advises all Scholars to take advantage of university/college housing whenever this is available.

At collegiate universities such as Oxford and Cambridge, it is customary for the colleges to offer accommodation at least for a student's first year. In London it cannot be assumed that there will be sufficient places for all those seeking university accommodation although the larger colleges or 'schools' which have their own halls of residence do their best to satisfy the demand – again, at least, for a student's first year in residence. If your institution cannot offer you accommodation, the Commission will be able to advise you about finding permanent accommodation after you reach the United Kingdom. You must reply without delay to all communications on this subject. If you accept university residential accommodation (e.g. college hall of residence or hostel), you will normally be required to remain there for one academic year.

- 14(a) Couples accommodation is not easy to find in the United Kingdom and universities are not always able to provide university housing for couples and married persons. A university will, however, usually help in the finding of accommodation and Scholars requiring couples' accommodation would be wise to write to seek assistance immediately following completion of placement procedures. (It should be noted that, because of the general pressure on accommodation at universities, single students may also have to live off-campus for part of their course.)
- (b) In a number of university centres it is very difficult to find child care facilities. If you think you may need them it is important for you to ask your host university as early as possible whether any facilities are available. It is important to remember that child allowances are paid only from the date of arrival in the United Kingdom of the Scholar's children.
- 15 Before taking accommodation at any distance from your place of study you must establish that it is within any limits set by your university, and discuss with your supervisor any likely effects upon your attendance in your department. You should also consult the Marshall Office before taking accommodation so far from your place of study that it may be considered unreasonable.
- 16 Scholars should be aware that as part of new laws introduced in 2014, private landlords are required to check their tenants' immigration status before granting a tenancy agreement to ensure that the tenant has the 'right to rent'. This means that it will not be possible for a Scholar to secure private accommodation in the UK in advance of their arrival. If a Scholar secures accommodation in the private sector after their arrival in the UK, the Marshall Commission can provide a letter of reference for private accommodation should you require it. They cannot sign a Deed of Guarantee on a Scholar's behalf.

This applies equally to Scholars who are moving to a new course of study in the second year of their tenure who will need to have applied for and been granted a new visa for their new course of study before securing private accommodation.

- 17 You should immediately notify the Commission of any change of address, whether temporary or permanent.

### **Deposits**

- 18 At some universities/colleges a non-returnable deposit must be paid in order to reserve accommodation. The Commission can, upon request, pay this on your behalf and will deduct the amount from your first stipend payment.
- 19 At some universities/colleges and in renting private accommodation, a returnable deposit is requested and must be paid before you enter the accommodation. This is held until your departure as security against debts. This money will be paid on your behalf by the Commission and will be claimed back upon your departure. You will be asked to sign an agreement with the Commission confirming your responsibility to ensure that the full sum of the deposit loaned is returned at the end of your tenancy, or at the end of your scholarship, whichever is sooner. Failure to ensure that accommodation deposits are returned to the Commission will result in homeward fares being withheld.

The Commission cannot act as a guarantor for Scholars.

# Studies

## Courses of Study

- 20 One Year Marshall Scholarships – A one year Marshall Scholarship is tenable for one academic year (i.e. 12 months). It is a condition of the award that Marshall Scholars must proceed to a degree that can be completed within the tenure of their award. The one year Marshall Scholarships cannot be extended beyond the 12 month tenure.

Scholars awarded a one year Marshall Scholarship are expected to remain in the UK for 12 months. If you have a commitment to return to the US earlier than this in order to start a PhD, MD or JD degree, permission must first be sought from the Commission. A minimum of 10 months in the UK may be allowed under these circumstances.

Two Year Marshall Scholarships – A two year Marshall Scholarship is tenable for two academic years. It is a condition of the award that Marshall Scholars must proceed to a degree that can be completed within the tenure of their award. Scholars awarded two year Marshall Scholarships who propose initially to undertake a one year programme will be required to consider what course of study might be undertaken in their second year. This could be another one year degree either at the same institution, or at a different university. Alternatively you might consider continuing for a PhD at the same institute or a different university (NB funding is not guaranteed for the 3rd year of the Scholarship). Scholars applying for new degrees in their second year of tenure will make applications through the Marshall Office with the approval of the Commission. Up to two applications may be submitted at one time but these should not normally be for the same institution.

- 21 If you believe you are unable, for any reason, to pursue the approved course of study, you must, without delay, inform the Commission of the circumstances. If any change of registration is proposed, you should apply to the Executive Secretary in writing for prior approval of the change. You should not assume that such permission will automatically be granted.

The Commission does not fund the following degrees:

- Second BA/BSc (undergraduate) Degrees
- MBA (any university)
- MPhil Development Studies (University of Oxford)
- MSc/MFE Financial Economics (any university)
- MSc Global Health Science and Epidemiology (University of Oxford)
- MSc International Health and Tropical Medicine (University of Oxford)
- MSc Law and Finance (University of Oxford)
- MPP (Public Policy) (University of Oxford)
- PGDip/Certificates in any subject
- Distance learning degrees

Nor does it fund supervised research not leading to a qualification or degrees that require extended periods away from the University or the UK.

- 22 You must contact the Assistant Secretary in the event of any difficulties with arrangement for your registration, supervision, etc., over the course of your award.
- 23 You must observe the regulations of the university or institution in which you are placed.

### **Reports on Progress**

- 24 You will be required to submit to the Commission, at the end of each academic year, a report on your work. Failure to submit your report may result in your next stipend payment being delayed. Your supervisor or tutor will be required to report on your progress each year.

### **Extensions of Scholarships**

- 25 Marshall Scholarships may be extended by the Commission, though not beyond the end of a third academic year. Third-year extensions are granted by the Commission on a limited basis, for strong academic reasons, subject to the availability of funds. In addition funding agreements have been made with various partners. For further information on these arrangements please contact the Assistant Secretary. Where a funded third-year extension is granted the Commission will pay up to a maximum of £475 for any necessary visa extension, plus the Immigration Health Surcharge for one year.

### **Duration and Termination of Award**

- 26 Your Scholarship will commence on the date stated on your Notification of Award or on the date, if later, of your arrival in the UK. It will continue for the initial period specified on your Notification of Award or until the date, if earlier, when you complete or discontinue your studies. Your Scholarship may be terminated at any time for reasons of unsatisfactory conduct, progress, attendance, or of ill health (refer to the Marshall Commission's disciplinary process, available upon request from the Commission's office).
- 27 If for any reason you are worried or in trouble during your award, you can talk to or write to the Assistant Secretary or Programme Administrator at any time.

### **Code of Conduct**

- 28 As a Marshall Scholar, you are an ambassador for both the MACC and the United States of America, and your actions and remarks will have an impact on the reputation of both. You are therefore expected to adhere to high standards of conduct and behaviour and to show respect to others and your surroundings at all times. It should be noted that you will also be expected to comply with your university's regulations on conduct and will be subject to their policies and procedures. The MACC works closely with the universities in requiring the highest standards of conduct and total probity, on the part of staff and faculty as well as students.

The Marshall Commission aims to enable a free exchange of ideas during all its activities in order to achieve the maximum potential impact for all participants. Recognising the diversity of backgrounds among our award holders – in terms of race, religion, gender, sexuality, cultural values and disability status – you are reminded to always be respectful to others and to behave in an appropriate

manner. All communication should be appropriate for an audience including people of many different backgrounds; harassment and sexist, racist, or exclusionary comments or jokes are not appropriate nor is discrimination either direct or indirect.

The same considerations apply to social media and electronic communications and the provisions of this Code and the Disciplinary Policy apply as they would to speaking in public or writing something for publication, either officially or in a personal capacity. When engaging with social media you should at all times respect confidentiality, financial, legal and personal information. Social media and electronic communications, whether public or private, addressed to a group or an individual, should never be used for harassment, bullying, defamation, or any behaviour that makes another individual feel threatened or uncomfortable. Please see the Social Media Policy in paragraph 29.

The Marshall Commission is committed to proactively safeguarding and promoting the welfare of Marshall Scholars, and to protecting all those with whom the Commission comes into contact. The Commission requires Commissioners, Secretariat staff, and Scholars and Fellows to fulfil their role and responsibilities in a manner consistent with requirements for safeguarding. The Commission's Safeguarding Policy can be found on our website.

Scholars are expected to fulfil all requirements put on them as award-holders and return all documentation in a timely and complete manner. Scholars are expected to treat any staff engaged within the Secretariat, or within any other organisation contracted to provide services to the Commission, with courtesy and respect. It is expected that such staff will show you the same consideration in return.

The Commission operates a zero-tolerance attitude to fraud and will investigate all instances of actual, attempted and suspected fraud, bribery or corruption committed by Scholars and Fellows related to their award. Any such instances will be considered under the Commission's Anti-Fraud Policy.

Any complaints received or issues related to the behaviour of Scholars brought to the attention of the Commission will be taken very seriously and any behaviour that does not adhere to the above values and expectations will be addressed by the Marshall Commission. Your award may be terminated at any time for reasons of unsatisfactory conduct, progress, or attendance, or if your registration is suspended or terminated by your university for any reason.

## Social Media

29 Social Media is a public forum and the same considerations apply as would to speaking in public or writing for publication. The following Terms of Use apply.

You should not publish content that may be seen as abusive, obscene, indecent, or offensive. This includes:

- Publishing offensive or derogatory content relating to sex, gender, race, nationality, disability, sexual orientation, religion/beliefs, age, or any other such trait
- Publishing content that is insulting, hateful, defamatory, threatening, discriminatory, or pornographic
- Behaving in a bullying, intimidating, or harassing manner towards other users, organisations, or page administrators
- Contains, or alludes to, unlawful material
- Encourages anyone to act in contravention of the terms of their award
- Constitutes spam or promotes or advertises products that have little relevance to the spirit and purpose of the group
- Associates the Marshall Commission, the AMS, the FCO, or the British or US Embassy, or universities with personal views or comments

The Marshall Commission will determine whether content contravenes any of the above terms.

Content that contravenes any of the above terms will be removed by the Marshall Commission from spaces that the Commission administers.

We will not edit any of your comments. If you post content that contravenes these guidelines, and we have to remove it, we will contact you to explain why. Transgressors may face disciplinary action, which could range from an official warning to the revocation of your award.

You should always be aware of maintaining security and take the necessary precautions when using social media and messaging platforms. Be mindful that any content which is posted on such platforms – even within closed spaces – may make it into the public domain.

The Marshall Commission will regularly and spontaneously share our favourite and relevant content from awardees' Twitter and Instagram feeds.

Whilst you are encouraged to add Marshall to your online bios and profiles, you are not permitted to create a public Marshall group, page, profile, or website on any online platform. This extends to the use of the word 'Marshall' or its derivatives in the name of any group, page, profile, domain, etc., and use of the logo. If you wish to use the Marshall name or branding in any other manner, please contact the Assistant Secretary first for permission.

If you take it upon yourself to administer an unofficial online group containing members of the Marshall community, you also assume responsibility for ensuring that the spirit of the Marshall programme is upheld in those spaces.

We may at any time, and without notice to you, revise this policy.

## **Residence**

- 30 Scholars are required to enrol at a British university for the full tenure of their award as full-time students proceeding to a higher degree. As a Marshall Scholarship is intended to give the holder an opportunity to see as much as possible of the United Kingdom, meet its people and observe its institutions, you should be prepared to spend a reasonable proportion of your vacation time in the country. Academic study proposals involving lengthy periods away from the university or outside the United Kingdom will not be accepted.

One Year Marshall Scholarships – All visits overseas (for academic or non-academic reasons), including to the United States, are subject to approval by the Marshall Commission and may not exceed 30 days in an academic year. If permission is given by the Commission to exceed this limit Scholars will be subject to a loss of living allowance for that period. NB Scholars on one year Scholarships should not be applying for graduate programmes in the US during their tenure as a Marshall Scholar.

Two Year Marshall Scholarships – Non-academic visits outside the UK are subject to approval by the Marshall Commission and should not exceed 30 days in an academic year. If permission is given by the Commission to exceed this limit, Scholars will be subject to loss of living allowance during this period.

Scholars who have a strong academic reason for overseas travel for research will be allowed to spend up to 90 days per academic year outside the UK on stipend. Anything beyond this will lead to loss of living allowance. This type of visit is subject to approval by the Marshall Commission. Scholars must send an academic proposal and letter of support from their tutor/supervisor to the Assistant Secretary for consideration by the Commission.

All Scholars, on one year or two year Marshall Scholarships should notify the Commission if you intend to be outside the country making sure that you leave contact details. Failure to declare travel may result in Scholars being referred to the Commission for disciplinary action.

# Allowances

## Employment

- 31 Marshall Scholars are not barred from taking part-time paid employment while in the UK but this is subject to Home Office regulations, University/College regulations, and individual Scholars' overall commitment to their studies in the UK and conditions of award. Scholars should remember that their academic studies are of paramount importance and should be given due priority. All paid employment must be approved by the Commission. The Home Office Regulations state that you must not work for more than 20 hours per week during term-time or 40 hours per week during vacation. The only exception to this being where the placement is a necessary part of your studies and you have the permission of your UK university/college and the Marshall Commission.

## Other Awards

- 32 A Marshall Scholarship may not be held concurrently with any other award and the Commission reserves the right to abate or withdraw its Scholarships in instances where Scholars are beneficiaries of other significant awards, prizes or earned income.

## Maintenance Allowance

- 33 Your monthly maintenance allowance (called a stipend) will be higher where the place of study is within the London metropolitan area. Maintenance allowance is calculated to cover your own basic expenses only, such as accommodation, meals (including those on journeys in the United Kingdom), personal expenses, daily travel and an element for books.
- 34 Your maintenance allowance will be deposited in to your UK bank account once this has been opened. You must return your BACs form in order for the your allowance to be paid. All subsequent payments will be made by bank transfer directly into your bank account. The maintenance allowance ceases on the termination date of your Scholarship or the date on which you leave the United Kingdom, whichever is earlier.
- 35 A list of the rates of allowances is given on a fee sheet provided at the beginning of your award.

## Military Scholars

- 36 Marshall Scholars who are members of the US military and in receipt of a salary receive 50% of the maintenance allowance throughout their tenure as a Marshall Scholar.

## Married Scholars

- 37 The Commission does not offer an additional allowance for married Scholars. A settling in allowance will be offered for up to three months at the beginning of a married Scholar's tenure providing the partner has not already found employment.

A valid marriage/civil partnership certificate (with certified translation in English if appropriate) must be produced in order to claim the settling in allowance. The Commission will require sight of the marriage/civil partnership certificate before the settling in allowance can be paid. If your partner intends to join you at a later date, or if you marry in this country, proof of arrival / marriage will be required. The settling in allowance is only payable at the beginning of a Scholarship.

No additional allowances are paid to Scholars who marry another Marshall Scholar.

### **Air Fares**

- 38 The Commission will meet the cost of the incoming air fare from the United States to the UK at the beginning of the Scholar's tenure. It will also meet the cost of the homeward air fare from the UK to the Scholar's hometown at the end of their tenure on the condition that the Scholar has successfully completed a course of study and had their homeward airfare approved in advance of booking. No additional air fares will be reimbursed. See paragraph 65.

### **Child Allowance**

- 39 For a Scholar who is accompanied by children, child allowance is paid for the first, second and third child under the age of sixteen years provided that they are residing with their parent in the UK for a continuous period of at least three months. In all cases proof of arrival and/or birth will be required (passport details and birth certificates or certified translations) before allowances can be paid.

It is important that you immediately notify the Commission of any change in the number of your children who qualify for this allowance. The allowance represents only a small part of the cost of maintaining children in the United Kingdom.

### **Dates of Payment**

- 40 The allowances mentioned in the preceding paragraphs will normally be paid into your bank account. The payments will be received as follows:

#### **1st year**

October 3 months stipend, book allowance  
January 3 months stipend  
April 3 months stipend  
July 3 months stipend

#### **2nd year**

October 3 months stipend  
January 3 months stipend  
April 3 months stipend  
July stipend to end of tenure or departure from UK (see para 64)

### **Books and Equipment Allowance**

- 41 You will receive a grant towards the cost of books and equipment for the first year of your tenure. This will be added to your first stipend payment.

# Claimable allowances

Forms for the following grants can be found at

<https://drive.google.com/open?id=1M93Z-ZpDSuX8yQeRsogWdyzae6VrmVUH>

It should be noted that all claims must be accompanied with receipts, the Commission does not accept bank statements or credit card receipts as evidence for claims. Claims should be received within three months of the costs being incurred. Claims received outside this timeframe will only be paid at the Commission's discretion.

## Thesis Grant

- 42 A Marshall Scholar may apply for a grant towards costs related to the production, research and writing of their thesis/dissertation in cases where such a document is required for their degree. The thesis grant is intended to help defray such costs as printing, copying, binding, etc. This must be claimed on a form provided by the Commission and receipts must be provided.

The value of the thesis grant is listed on the fee sheet (received at the beginning of the award). No claim for thesis expenses beyond this amount will be entertained.

## Study Travel Grant

- 43 A Scholar may apply for a grant to help meet the cost of expenses incurred during conference attendance or study visits related to their course of study, either in the UK or overseas. The sum available is listed on the fee sheet (received at the beginning of the award) and is for two years. No claim for expenses beyond this amount will be entertained.

Applications for approval of a study travel grant should be submitted on a copy of the form provided by the Commission. The form must be countersigned by your supervisor for UK travel, or accompanied by a letter of support, outlining how the travel is related to your course, from your supervisor for overseas travel, and be accompanied by receipts. The Commission will assess and authorise the sum payable, and will keep a record of your expenditure over the duration of your award. It is not payable automatically, and all applications should be made promptly and during the tenure of the Scholarship.

Scholars may not request grants for study travel in respect of journeys to be undertaken following the expiry of the award.

## Daily Travel Grant

- 44 Scholars are expected to reside near to their university avoiding lengthy or costly travel. The Commission will normally only reimburse the equivalent of a zone 1 student monthly oyster (for London). If Scholars choose to live more than one zone from their university in London they must seek approval before making any claims. Scholars are expected to claim the student rate for all reimbursements. The Commission will make payment of necessary daily expenses for travel between place of residence and place of study, provided the distance between the two is reasonable and has been approved. This must be claimed on a form provided by the Commission and receipts must be provided.

Scholars are also entitled to claim a 16-25 railcard or coach card and membership of the Youth Hostel Association. This must be claimed on a form provided by the Commission, available on the google drive, and receipts must be provided.

### **Marshall Plus Allowance**

- 45 Each January Scholars will receive a portfolio of suggested UK based professional and social membership organisations, that they may be interested in joining. Scholars may claim reimbursement of the cost of joining one or more of these organisations otherwise approved by the Commission, up to a maximum of £150 per year. Scholars will not be reimbursed for membership fees to organisations which have not been previously approved by the Marshall Commission and are reminded to ensure that student membership is applied for wherever available.

Scholars are entitled to claim affiliation fees and membership fees for university or local sports clubs up to a maximum of £50 as part of the overall allowance of £150. Costs relating to gym memberships and exercise classes cannot be claimed.

Scholars may also claim reimbursement of the cost of attending / travelling to events run by an organisation that they have become a member of through the Marshall Plus Scheme. These costs must also be claimed from the total sum of £150 allocated to each Scholar. This excludes sports events and social events.

Annual membership fees must be claimed three months before the end of the Scholars tenure to enable the Scholar to maximise the benefit of such memberships.

Please note that membership fees for the Oxford and Cambridge Unions cannot be reimbursed under Marshall Plus.

### **Approval of Tuition Fees**

- 46 Approved fees will normally include fees for tuition, examination and use of a laboratory. You must yourself pay the subscriptions to any university or college clubs that you join including the Oxford and Cambridge Union Societies. Fees for accommodation, battels, or maintenance are your own responsibility.
- 47 Accounts for approved fees will be sent by the university or college to the Marshall Commission. If you receive a request for these fees yourself, you should forward originals of the invoice to the Commission.

### **Change of Place of Study**

- 48 If you have to change your university in your second year and you are moving cities, you may claim the cost of one journey to your new institution and the cost of removal of your heavy luggage. The Commission is prepared to reimburse the most economical method of transportation, which could include the hire of a vehicle or the cost of a train fare, on the condition that the Scholar has had a quote approved in advance of booking. Failure to get the quote approved by the Commission may result in the full amount not being reimbursed. Receipts must be presented. This allowance cannot be applied to moves within the same city.

## Renewal of Entry Clearance

- 49 All Scholars undertaking two one year degrees and Scholars who are awarded third year funding will be required to apply for a renewal of their Entry Clearance.

For Scholars undertaking new degrees in their second year of tenure, whether it be at the same institution as they spent their first year, or a new institution, applications must be submitted prior to the start of the Scholar's new course of study.

Scholars making applications from within the UK should be aware that they may not be permitted to leave the UK until they receive their new Biometric Residence Permit. This may take up to 10 weeks from the date of submission.

The Commission will pay the £475 charge for postal applications for visa extensions made from within the UK on behalf of Scholars who should submit their applications via the Marshall Office. In addition, the Commission will cover the cost of the annual Immigration Health Surcharge which is paid upfront at the point of application. If the validity of a Scholar's visa extends beyond their tenure as a Marshall Scholar the Commission will only pay the annual Immigration Health Surcharge for the number of years remaining within the Scholar's tenure.

Applications can also be made from the US and there is currently no charge for Marshall Scholars applying for Entry Clearance from their home country but Scholars will need to include a prepaid waybill and shipping envelope with their application documents for the return of their passports.

The cost of Entry Clearance and visa renewal applications for Scholar dependants must be met by the Scholar directly.

## Tax

- 50 Under the US Tax Reform Act (1986), American citizens in receipt of a scholarship/fellowship such as a Marshall Scholarship are required to pay tax on that part of the award which cannot be considered as 'direct educational costs'. So far as Marshall Scholars are concerned, this means that they must pay tax on the stipend, including the arrival allowance, and the fares to/from the United States. There is no liability for tax on the tuition fee element and book grant element of the Scholarship.

The statement above is the most current information from the IRS, although you might wish to talk to the IRS yourself. The Commission will provide you with a statement of funds should it be required.

# Events and offices

- 51 The Commission will normally host at least three events each year for Marshall Scholars. There will be a reception in London, usually the third Thursday in September, to welcome the incoming class of Scholars, and a dinner in May to honour the Scholars completing their awards. In addition there will be a trip during the Easter vacation.

The Commission will also offer talks and visits as part of the Marshall Plus Programme. There will normally be three or four talks per year and two visits.

- 52 The Commission offers you the opportunity to give a talk at a university/institution other than your own through the Marshall Scholars' Speakers Programme. Possibilities for talks include American politics, American culture, the current state of Anglo-American relationships or the opportunity to speak on a topic near to your own studies. Details on how to take up this opportunity will be included in your welcome package.

## **Class Secretary**

- 53 The Commission requires each class of Scholars to elect a Class Secretary. Elections will be held by e-mail in the October of each year. The Class Secretary will be responsible for keeping in touch with the class (by email) and, occasionally, may organise or assist with the organisation of get-togethers (such as the Thanksgiving Dinner) if there is sufficient support for this. The Assistant Secretary will consult the Secretary from time to time. The name of the Class Secretary will also be forwarded to the Association of Marshall Scholars in the United States.

## **Communications Secretary**

- 54 The Commission requires each class of Scholars to elect a Communications Secretary. Elections will be held by e-mail in the October of each year. The Communication Secretary will be responsible for highlighting current scholar achievements and events through a regular news bulletin and via the Association of Marshall Scholars (AMS) social media. The Communications Secretary will serve as the Class's primary liaison to the AMS and assist the Class Secretary in soliciting feedback and reporting to the Marshall Commission.

## **Scholar Experience Committee**

- 55 The Commission annually invites nominations for 5 or 6 current Scholars to serve as Scholar representatives on the Scholar Experience Committee. This Committee will work with the Commission to organise the annual Marshall Plus events programme.

## **Speaker for the Annual Dinner**

- 56 It is traditional at the Dinner for the Chair of the Commission to propose a toast to the Scholars who are returning home. A chosen Scholar, from the departing class, then responds. Nominations, and if necessary elections, will be taken in March of each year.

# Health and medical services

## National Health Service

- 57 Medical Treatment in the United Kingdom. Marshall Scholars will have their Immigration Health Surcharge (IHS) paid by the Commission. You will apply for this as part of the application process and must keep a record of it for future reference.
- 58 One of the first things you should do at your place of study is to register with a doctor. Many British universities have their own panel of doctors available for students. Please ensure you choose an NHS doctor.
- 59 You are immediately eligible to be registered with a general practitioner (a family doctor) under the care of the NHS and to be given medicines on the same basis as United Kingdom residents. This means you will have to pay a sum (around £9.00) towards the costs of medicines, which you must meet from your stipend. The contraceptive pill is free of charge.

## Notification of Illness

- 60 If you fall ill, please ensure that you inform the Commission as soon as possible.

## Compassionate Leave from the UK

- 61 In exceptional circumstances, the Assistant Secretary has the discretion to allow a number of days of compassionate leave in addition to the total number of days allowance for travel outside of the UK for personal reasons.
- 62 The Commission can, at its discretion, meet the cost of compassionate airfares. Scholars should discuss their individual situation with the Assistant Secretary who will make the final decision about whether the Commission is able to offer the compassionate fare.

Compassionate fares are most likely to be offered in the instance of the bereavement of an immediate family member. Other individual circumstances may be considered but the Commission holds the final decision on when these fares may be offered.

## Insurance

- 63 The Commission takes no responsibility for insurance against sickness, accident, or death either for candidates in the United States or for selected Scholars travelling to or from or residing in the United Kingdom. Although eligible for medical treatment in the United Kingdom, Scholars are advised to maintain ongoing health insurance in the United States during their period of tenure.

Scholars are also advised to make adequate arrangements for insurance of personal possessions when travelling to or from or residing in the United Kingdom.

# Homeward travel

## Completion of Tenure

64 One Year Marshall Scholarships – The tenure for one year Scholarships is 12 months; therefore the Scholarship will normally terminate on 30 September of the year following your arrival. One year Marshall Scholarships cannot be extended beyond 12 months. Stipend will be paid until 30 September or the date on which you leave the UK, whichever is earlier.

Two Year Marshall Scholarships – The tenure for a two year Marshall Scholarship is 22 months; therefore the Scholarship will normally terminate on 31 July of your second year. For Scholars who finish and leave before the end of July, your stipend will be terminated on the day of your homeward fare.

For Scholars whose taught course finishes in July, August or September, you will receive stipend up to the end of your course plus an additional three weeks, or up to 30 September, (whichever is earlier). If you take your homeward fare before the end of the three weeks, stipend will only be paid until the date of your departure.

The only exceptions to this policy would be if, with the Commission's approval, you are undertaking an unpaid internship or further academic work in the UK during the summer.

For Scholars who are undertaking a PhD, providing you have not completed the degree requirements before the end of September, you will receive stipend until 30 September.

65 The Commission will pay for an economy class flight to the United States. You must check your proposed booking with the Programme Administrator who will approve the fare. Failure to have the fare checked in advance of making any bookings will result in reimbursement up to the cost of the most economical fare found by the Programme Administrator, which may be lower than the booked fare.

Scholars are strongly advised to use [www.statravel.co.uk](http://www.statravel.co.uk) to find the lowest homeward airfares. Should a Scholar wish to use an alternative company to book their homeward airfare they must provide evidence that the alternative will cost less than if they booked a like for like fare using the STA Travel website.

Homeward airfares must be:

- Economy class
- Normally one way; nearest airport to nearest airport
- The most economical route available

If a Marshall Scholar wishes to travel to a country other than the United States the Scholar should provide a quote to the MACC for the equivalent fare from the UK to home US airport. Reimbursement will be made up to the cost of the actual airfare booked, or the most economical fare to the Scholar's home US airport, whichever is lower.

Scholars must pay for their homeward fares in the first instance. The Commission will reimburse the cost upon successful graduation and on receipt of the homeward fare claim form and receipts. You must not have any outstanding debts to the Commission and must have completed the requirements for departing Scholars listed on the homeward fare claim form before any reimbursement is made.

Reimbursements can be made to Scholars' UK bank accounts or repaid in dollars to a US bank account. If the latter is preferred any bank fees incurred in international bank transfers will be met by the Scholar and deducted from the total funds reimbursed.

- 66 The Commission has discretion to meet the cost of shipping a reasonable amount of unaccompanied baggage across the Atlantic. The Commission's total liability in this respect is listed on the fee sheet, this is exclusive of insurance charges, which must be met by the Scholar. Receipts for baggage shipment expenses should be submitted to the Commission so that reimbursement can be made up to the maximum allowed, either through bank accounts in the UK or in US dollars to a US bank account.

### **Deferment of Homeward Travel**

- 67 The Commission has the discretion to hold open the homeward fare for any scholar who has not completed their degree, or wishes to remain in the UK for a maximum of five years after the completion of their tenure. If you wish to apply for a deferment you must write to the Commission before your award expires stating why and for how long you wish to remain.

### **Contact After Return Home**

- 68 Once you have completed your Marshall Scholarship you must complete the Commission's questionnaire and a Future Plans Form including a contact address and indicating your immediate plans after the end of your tenure. Your homeward fare will not be reimbursed until this has been submitted. You will automatically become a member of the Association of Marshall Scholars (AMS). For further information about the AMS please contact [admin@marshallscholars.org](mailto:admin@marshallscholars.org)



**MARSHALL COMMISSION:**

c/o ACU, Woburn House, 20–24 Tavistock Square, London, WC1H 9HF

E-mail: [Info@marshallscholarship.org](mailto:Info@marshallscholarship.org)