

**SMART**

SCIENCE, MATHEMATICS  
& RESEARCH FOR  
TRANSFORMATION

PART OF THE NATIONAL DEFENSE  
EDUCATION PROGRAM

# SMART Scholarship

Science, Mathematics & Research for Transformation



## **SMART SCHOLARSHIP PROGRAM PARTICIPANT HANDBOOK, revised 2013**

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# **1. APPLICABILITY**

This Science, Mathematics, and Research for Transformation (SMART) Defense Education Program (SMART) Handbook applies to all SMART Scholarship Program Participants (SSPPs) regardless of cohort year. This Handbook includes information applicable to all SSPPs, as well as information that is applicable to specific types of SSPPs. If a policy or procedure does not specify that it is specific to a particular type of participant, it applies to all SSPPs.

This Handbook is a transitional document. The execution of the SMART Defense Education Program (hereafter SMART Scholarship Program or SSP) is in the process of being transferred to the DoD Components. As the transition occurs, the roles and responsibilities set forth in this Handbook may be performed by different entities. As the DoD Components develop procedures and mechanisms to execute the SSP, program policies and procedures may change. This Handbook will be updated in 2014 to reflect current policies and procedures. See Section 2.2 for the current primary contact for all SSPP questions or issues as of the publication of this Handbook. SSPPs will be informed if the primary contact for programmatic questions and issues changes.

# **2. ORGANIZATIONAL OVERVIEW AND CONTACTS**

## **2.1. Program Sponsor**

Within the Office of the Secretary of Defense (OSD), the Assistant Secretary of Defense for Research and Engineering (ASD(R&E)) is responsible for program policy and oversight.

## **2.2. SMART Program Office**

ASD(R&E) maintains the SMART Program Office (SPO) which is currently responsible for the daily administration of the SSP. Within the SPO, cohort administrators (CAs) are the first contact for SSPPs regarding all program related questions and concerns. The SPO provides SSPPs with their CA's name and contact information. SSPP requests are processed through the SPO for ASD(R&E) consideration. The SPO is located at 400 Camino Aguajito – 1st Floor, Monterey, CA 93940, 831-657-9105 (fax). The SPO communicates with SSPPs primarily through email. The main contact for the SPO is [smart@nps.edu](mailto:smart@nps.edu). SSPPs should go to <https://smart.asee.org/award> to access the most recent version of SSPP documents.

## **2.3. American Society for Engineering Education**

Currently, the American Society for Engineering Education (ASEE) is responsible for promoting the SSP, recruiting applicants, maintaining the SSP websites, and administering the application, evaluation, and selection processes. ASEE also distributes all recruitment SSPP program funds, including stipends, book allowances, health insurance allowances, related educational fees, certain travel funds, and tuition for all SSPPs. ASEE is located at 1818 N. Street, N.W., Suite 600, Washington, D.C. 20036, 202-331-3544 (phone), 202-463-1401 (fax). ASEE communicates with SSPPs primarily through email. The main contact for ASEE is [smart@asee.org](mailto:smart@asee.org).

## **2.4. Sponsoring Services**

A sponsoring service is a DoD Component that participates in the SSP. There are four sponsoring service designations in the SSP: the Army, Department of the Navy, Air Force, and smaller DoD agencies and activities.

## 2.5. Sponsoring Facilities

The sponsoring facility (SF) is the particular laboratory or agency within the DoD Component that participates in the SSP. The SF is the location at which an SSPP completes internships and the service commitment.

## 2.6. Service Liaisons

Currently, each DoD Component has a designated service liaison within the SPO. The service liaison is the main point of contact (POC) between the SPO, sponsoring service, and SFs. Service liaisons may assist SSPPs in developing positive relationships with their SFs, and in certain circumstances may assist in securing internships and placement for completion of the service commitment. The SPO provides SSPPs with their service liaison's name and contact information.

## 2.7. Recruitment and Retention Participants

An SSPP is an individual who received and accepted a SMART award. An individual remains a participant throughout all three SMART program phases.

A recruitment participant is a participant who is not employed in a permanent civilian position by the SF at the time of award. Participants who are employed by the SF in temporary or internship positions at the time of award are recruitment participants.

A retention participant is a participant who is employed in a permanent civilian position by the SF at the time of award.

## 3. PROGRAM CYCLE

Month	Action
August	The application period opens in August.
December	The application period closes in December.
Winter	After the application period closes, applications are verified, sent to panel review, and ranked. The top designated percentage of ranked applications are sent to SFs for review. SFs review applications and interview applicants.
Spring	SFs submit selection list. Award offers are sent out. Depending on the number of declinations, a second round of awards may be issued.
Summer	SSPP orientation occurs in the summer.
August	The SMART award year begins 1 August.

## 4. PROGRAM PHASES

SSPPs complete the following three program phases during their lifecycle with the SSP:

Phase 1: Degree Pursuit. Phase 1 begins at the time an SSPP accepts a SMART award by signing the SSA and ends upon verified completion of all phase 1 requirements. During phase 1, SSPPs complete requirements to obtain the degree funded and internships, if required. As SSPPs near completion of phase 1, they work with the SF, SPO, and service liaison to prepare for the start of the service commitment.

Phase 2: Service Commitment. Phase 2 begins upon the work start date and ends upon completion of the required post-graduation service. The work start date is the day on which an SSPP begins the service commitment with the SF after verified completion of all phase 1 requirements. Once phase 1 is

verified completed, the SPO provides written confirmation of official entry into phase 2, including service commitment start and end dates. During phase 2, SSPPs complete the service commitment by working full-time for their SF.

Phase 3: Monitoring. Phase 3 is a 10 year employment status monitoring period that begins upon completion of the service commitment. During phase 3, the SPO tracks SSPP employment status for 10 years to obtain information on SSPP retention rates within the DoD.

## **5. PRE-ACCEPTANCE PROCEDURES**

### **5.1. SF Assignment**

SSPPs are notified of the identity and location of their assigned SF at the time of award. During the award process, SFs recommend individuals for SMART awards with the expectation that the awardee will join the facility's workforce after completion of phase 1.

Prior to accepting a SMART scholarship, awardees are responsible for investigating the SF, its activities, additional service obligation requirements, and SF location to ensure that the facility and local area are an appropriate fit.

All SSPPs complete the service commitment with the SF approved by the SPO. Multi-year SSPPs complete internships with the SF approved by the SPO. Only the SPO may reassign an SSPP to a new SF.

### **5.2. Geographic Mobility**

SSPPs must be geographically mobile and relocate to the SF for completion of the service commitment and internship periods, if required.

### **5.3. Degree Funding**

SSPPs enrolled in a single degree program receive SMART funding for that degree only. SSPPs funded for a dual degree may receive funding throughout the completion of both degrees, not to exceed five years. SSPPs may request funding for subsequent degrees by reapplying to SMART for a separate award in accordance with the SSP follow-on funding policy.

### **5.4. Award Length**

SMART scholarships are awarded for a specific time based on the anticipated degree completion and conferral dates on the SMART Service Agreement (SSA). SMART scholarships range from a minimum of 1 year to a maximum of 5 years per award, depending on degree requirements.

### **5.5. Award Deferral**

SMART scholarships generally may not be deferred. SSPPs begin or resume academic work in the term immediately following receipt of initial SMART funding.

## **6. PREREQUISITES TO INITIAL AWARD FUNDING**

### **6.1. Application to Initial Award Funding Grade Point Average Requirement**

SSPPs enter the first funding year with a minimum GPA of 3.0 on a 4.0 scale. If an SSPP's grades for the degree funded by SMART fall below a cumulative GPA of 3.0 on a 4.0 scale between application and the start of the fall term of the initial funding year, the SSPP may be immediately dismissed from the SSP.

## **6.2. Required Documentation**

SMART awards are based on the availability of funds. SSPPs provide the following documentation, unless otherwise stated. An award will not be funded until all required documentation is received. Failure to provide required documentation or meet any eligibility requirement may result in dismissal from the program.

- a. Official transcript. If the SSPP attended school the previous year, an official transcript from the academic institution attended is required. (This requirement is in addition to the transcript provided with the application and must reflect all coursework and grades during the academic year preceding issuance of the award);
- b. Proof of U.S. citizenship;
- c. Proof the SSPP is at least 18 years old as of the date the SSPP signs the SSA or the SSA must be cosigned by a parent or legal guardian;
- d. Current contact information;
- e. All requested security clearance information and paperwork;
- f. Form W-9;
- g. Official Form 306 – Declaration for Federal Employment;
- h. Draft Educational Work Plan (EWP);
- i. SMART Scholarship Privacy Act Statement;
- j. SMART Scholarship Release and License to Use Image, Name, and/or Voice; and
- k. SMART Scholarship Authorization for Direct Deposit.

## **6.3. Orientation**

All SSPPs are required to complete the mandatory SSP orientation. Orientation provides an opportunity to learn more about the SSP and the SF. Orientation completion is a prerequisite to initial receipt of SSP funds.

# **7. GENERAL PROGRAM PROCEDURES**

## **7.1. Compliance Requirement**

SSPPs comply with all SSP policies and procedures, including the requirements set forth in this Handbook. Compliance with all SSP policies and procedures, as agreed to in the SSA, is required for continued participation in and funding under the SSP.

## **7.2. Completion of Degree in Compliance with SSA**

SSPPs complete the degree funded by SMART as set forth in the SSA. SSPPs complete all degree requirements during phase 1, including thesis/dissertation writing, edits, defense, etc. In certain circumstances, an SSPP may request an amendment to the SSA. If the request is approved, the SSA will be amended. If the request is denied and the SSPP fails to complete the degree in compliance with the



SSA, the SSPP may be placed in an auditable status of non-compliance and/or dismissed from the program depending on the nature of the default.

### **7.3. Code of Conduct**

SMART is committed to the professional development of SSPPs, securing the program's reputation of excellence, and safeguarding the public's investment in the program.

- a. Academic excellence. SSPPs strive to meet SMART academic requirements, attend all classes/laboratories, are respectful to instructors, and complete coursework to the best of their ability.
- b. Professionalism. SSPPs are courteous, honest, and responsible in their communications and interactions. SSPPs are timely in attendance and completion of duties. SSPPs strive to achieve a level of excellence that exceeds minimum requirements.
- c. Leadership. SSPPs take the initiative to advance their knowledge and share their experience with others.
- d. Integrity. SSPPs adhere to the highest ethical standards and comply with applicable laws, rules, and regulations.
- e. Public service. SSPPs are mindful of the public investment made in their SMART awards and act in a manner that is worthy of that investment. SSPPs are dedicated to and uphold the principles and national interests of the United States.

### **7.4. Current Contact Information**

SSPPs keep current contact information with the SPO at all times, including accurate email address(es), mailing address, telephone, and residency status (the residency status claimed by the SSPP for tax purposes). SSPPs update the SPO immediately with changes or updates to their contact and/or residency information.

### **7.5. Communication**

The primary method of communication with SSPPs is through email. SSPPs check their email regularly and designate SMART-related emails as non-SPAM material or regularly check SPAM email folders.

### **7.6. SMART Award Website**

SSPPs comply with updated SSP policies and procedures posted to their accounts <https://smart.asee.org/award>. This website also contains SSPP documents. Updated information regarding program policies, deadlines, and other program events are located on the SMART website.

### **7.7. SF Sponsorship**

SSPPs maintain sponsorship of the facility approved by the SPO. Continued sponsorship of the approved SF is a requirement to maintain participation in and funding under the SSP. Any SSPP communications or actions with the assigned SF that result in loss of sponsorship (at the sole discretion of the SF) from the assigned SF may result in SSPP dismissal from the program.

## **7.8. Outside Funding**

During phase 1, SSPPs may accept funding from sources outside of SMART, including private scholarships, fellowships, grants, and private or federal student loans. SSPPs do not accept funding from federal scholarships, fellowships, grants (including the Federal Pell Grant) or other federal funding sources other than SMART with the exception of salary supplements provided by SFs and Veteran's Affairs programs (ex: Montgomery GI Bill, Post 9/11 Veterans Educational Assistance Act, the Survivors' and Dependents' Educational Assistance Program).

There is no monetary limit on the amount of outside funding an SSPP may accept. Acceptance of outside funding may in no way impact the SSPP's obligations under the SSA. Receipt of outside funding does not reduce or eliminate the service commitment.

## **7.9. Outside Employment**

During phase 1, recruitment SSPPs may accept employment outside of SMART that does not exceed 16 hours per week.

SMART does not require retention SSPPs to continue working for the SF during phase 1. There is no set limit on the number of hours a retention SSPP can work for the SF during phase 1. However, retention SSPPs are expected to work less than full-time prior to completion of all degree requirements, including thesis or dissertation writing.

SSPP employment hours may be further restricted if the work negatively impacts the SSPP's ability to fulfill the SSA. There is no monetary limit on the amount of wages a SSPP may earn. Outside employment may in no way impact the SSPP's obligations under the SSA.

## **7.10. Pursuit of Degrees Outside the SSP**

SSPPs do not simultaneously pursue another degree while in phase 1.

## **7.11. Follow-on Funding**

SMART scholarships are awarded for one degree program at a time. There are three types of follow-on awards which correspond to the SSPP's program phase at the time of the follow-on application. Follow-on awards are separate from the initial award. The five year funding cap is calculated separately for each award.

- a. Type 1 Follow-On Awards. Phase 1 SSPPs who wish to pursue an additional degree request a type 1 follow-on award. In order to receive a type 1 follow-on award, a SSPP must reapply to SMART for a separate award, score in the top 50 percent of applicants for the new award cycle, and be recommended for a follow-on award by the SSPP's assigned SF.

SSPPs who receive a type 1 follow-on award immediately reenter phase 1 for completion of the follow-on degree. SSPPs enter phase 2 and complete the service commitment for both awards consecutively and without interruption once the follow-on degree is completed or conferred, whichever occurs first. Time spent working at the SF is not applied toward completion of the service commitment until the SSPP completes phase 1 for both the initial award and the type 1 follow-on award.

- b. Type 2 Follow-On Awards. Phase 2 SSPPs who wish to pursue an additional degree request a type 2 follow-on award. In order to receive a type 2 follow-on award, a SSPP must reapply to

SMART for a separate award, score in the top 50 percent of applicants for the new award cycle, and be recommended for a follow-on award by the SSPP's assigned SF.

SSPPs who receive a type 2 follow-on award immediately reenter phase 1 for completion of the follow-on degree. SSPPs reenter phase 2 once the follow-on degree is completed or conferred, whichever occurs first. At that time, the SSPP completes the remaining service commitment for the initial award and the type 2 follow-on award. The service commitments are completed consecutively and without interruption.

Time working at the SF is applied to the service commitment as follows:

- (1) Time spent working at the SF after completion of phase 1 for the initial award and prior to the start of phase 1 for the follow-on award is applied toward completion of the service commitment;
  - (2) Time spent working at the SF during phase 1 of the follow-on award is not applied toward completion of the service commitment; and
  - (3) After the SSPP enters phase 2 for the follow-on award, time working at the SF is applied toward completion of the combined service commitment.
- c. Type 3 Follow-On Awards. Phase 3 SSPPs who wish to pursue an additional degree request a type 3 follow-on award. In order to receive a type 3 follow-on award, a SSPP must reapply to SMART for a separate award, score in the top 50 percent of applicants for the new award cycle, and be recommended for a follow-on award by a SF. Time spent working at the SF is not applied toward completion of the service commitment until the SSPP completes phase 1 of the follow-on award.

## **7.12. Leave of Absence**

SSPPs continuously participate in the program at all times. During phase 1, SSPPs continually pursue the funded degree on a full-time basis. If an SSPP is unable to participate in the SSP for more than 4 consecutive weeks, the SSPP must either receive a leave of absence or withdraw from the program. SSPPs may request and receive a leave of absence in the following circumstances:

- a. The SSPP of a member of the SSPP's immediate family, as defined by the Family and Medical Leave Act of 1993, has a medical condition requiring the SSPP to take a leave of absence; or
- b. The SSPP is activated for military service.

SSPPs may request a leave of absence in other emergency situations. The SPO may direct a SSPP to take a leave of absence if the SSPP fails to obtain their degree on time and/or will take beyond the program's five year funding cap to complete. All SSP funding is suspended during the leave of absence.

## **7.13. Withdrawal from the SSP**

SSPPs notify the SPO if they wish to withdraw from the program. If an SSPP withdraws from the program, the SSPP may be subject to debt repayment procedures.

#### **7.14. Non-Compliance and SSA Amendments**

If an SSPP is found non-compliant, the SPO will provide the SSPP with a non-compliance notice or a dismissal notice, depending on the nature of the default. A non-compliance notice specifies the SSPP is in an auditable status of non-compliance, and provides next steps. If the SSPP does not cure the default, the SPO may provide the SSPP with a dismissal notice.

In certain circumstances, an SSPP may request an amendment to the SSA. If the request is approved, the SSA will be amended. If the request is denied and the SSPP fails to complete the degree in compliance with the SSA, the SSPP may be placed in an auditable status of non-compliance and/or dismissed from the program depending on the nature of the default.

#### **7.15. Dismissal from the SSP**

An SSPP may be dismissed from the SSP for failure to comply with any program policy or procedure. A dismissal notice will be provided to the SSPP specifying the date of and reason for the dismissal. All SSP funding will cease immediately upon the date of dismissal. An SSPP dismissed from the program may be required to repay the entire award amount.

#### **7.16. Debt Repayment**

If a SSPP, whether employed by the DoD or not, is dismissed from the program for failure to comply with any SSP policy or procedure, or withdraws from the SSP prior to completing the service commitment, the SSPP may be subject to debt repayment procedures. An SSPP subject to debt repayment procedures may be required to promptly refund all amounts expended under the SSPP's SMART award, including all stipend, tuition, approved related educational expenses, travel expenses, health insurance funds, book allowance, and all other funds expended by the Federal Government under the SSPP's award. The obligation to make a refund and to reimburse the United States is for all purposes a debt owed to the United States. A discharge in bankruptcy that is entered less than five years after termination of a SSA, does not discharge the person signing such agreement from a debt arising under such agreement. The repayment of any refund shall be accomplished in accordance with the procedures established pursuant to the provisions of Volume 5, Chapter 28 of DoD 7000.14-R, "Department of Defense Financial Management Regulation (FMR)," November 2012, applicable policies and procedures established by the Defense Finance and Accounting Service (DFAS) and any additional applicable debt repayment policies and procedures.

#### **7.17. Patents**

In the course of an SSPP's studies, research, and/or other phase 1 activities, the SSPP may make discoveries, creations, inventions, or intellectual property which may be eligible for protection by patent or other means. SSPPs are required to notify their SF of the conception of discoveries, inventions, or creations which may be patentable. The SSP will not make a claim on an SSPP's patent. However, depending on the situation, the SSPP's SF and/or academic institution may have a claim on the patent. Pursuit of a patent may not cause a delay in degree completion or conferral, or necessitate any other amendment to the SSA.

### **8. PHASE 1 FUNDING PROCEDURES**

#### **8.1. Phase 1 Funding Overview**

All SSP funding is based on the availability of funds. SMART awards provide the amount of financial assistance determined by ASD(R&E) as being necessary to pay all educational expenses incurred by the

SSPP, including tuition, fees, costs of books, laboratory expenses, equipment expenses, and expenses of room and board. SSPPs only receive funding for the degree specified in the application to SMART and approved in the SSA. Additional degree funding requires re-application to SMART for a separate award in accordance with the follow-on funding policy.

## **8.2. Stipends**

Based on the availability of funds, SSPPs receive a stipend based on an annual rate as determined by ASD(R&E). Stipend rates may vary by cohort year. SSPPs who complete less than 12 months of phase 1 activities receive the stipend on a pro-rated basis.

- a. Recruitment SSPP Stipend Timing and Distribution. Based on the availability of funds, recruitment participant stipend payments are paid directly to the SSPP by ASEE. Recruitment participants generally receive stipend payments on the third Friday of each month, beginning in August of the first award year, provided all award funding prerequisites have been met.
- b. Retention SSPP Stipend Timing and Distribution. Based on the availability of funds, retention participant stipend payments are distributed through the SF's payroll and purchasing system. Retention participants receive the monthly stipend payments in the same manner as they receive their monthly salary.
- c. Stipend Payments and Start of Service Commitment. SSPPs receive one stipend payment after degree completion. SSPPs begin the service commitment within 60 days of degree completion.
- d. Stipend Rate Increases. SSPPs who applied for and received a SMART award in the years 2008 through 2013 may request an increase in the stipend rate for additional qualifications earned in the form of a conferred STEM degree funded by SMART. SSPPs awarded funding for a dual degree whose program does not confer the initial degree may establish additional academic qualifications by providing documentation from the academic institution verifying the SSPP has completed all requirements for the first degree such that if the SSPP left the degree program as of that date, the SSPP would be awarded the first degree. Documentation contingent upon the SSPP fulfilling additional requirements for the first degree will not support a stipend increase.

SSPPs who applied for and received a SMART award in the years 2008 through 2011 may additionally request an increase in the stipend rate for additional qualifications earned by passing qualifying examinations or equivalent requirements for acceptance as a permanent Ph.D. candidate.

## **8.3. Book Allowance**

Based on the availability of funds, the SSP provides an annual book allowance. SSPPs funded for a partial academic year receive the book allowance on a pro-rated basis.

## **8.4. Health Insurance Allowance**

Based on the availability of funds, the SSP provides an annual health insurance allowance to recruitment SSPPs. Recruitment SSPPs funded for a partial academic year receive the health insurance allowance on a pro-rated basis. Retention SSPPs generally continue to receive health insurance through their SF and the federal employee benefit system. Compensation coverage is not health insurance. Please refer to section 14.5 for more information on the compensation coverage provided to recruitment SSPPs.

### **8.5. Tuition and Approved Related Educational Expenses**

Based on the availability of funds, SMART funds the total cost of full-time tuition and approved related educational fees during the academic year (fall through spring). The academic year does not include summer terms. SMART scholarships are tenable at any regionally accredited U.S. college or university. There is no cap on tuition and the amount of a SSPP's tuition does not affect the length of the service commitment. Approved related educational fees generally include mandatory fees such as student activity and student government fees.

### **8.6. Additional Tuition and Enrollment**

Based on the availability of funds, SMART funds full-time tuition and approved related educational fees during the academic year (fall through spring). The academic year does not include summer terms. Enrollment and/or completion of coursework during summer terms, whether taken on-line or at a physical location, requires prior authorization from the SPO even when the academic institution does not assess tuition charges for the additional term/enrollment.

### **8.7. SSPP Phase 1 Tax Responsibilities**

The SSP does not withhold taxes from funds paid to or on behalf of SSPPs during phase 1. ASEE provides each recruitment SSPP and the Internal Revenue Service (IRS) with the Form 1099-MISC recording the amount paid to the SSPP during the tax year. Taxes are withheld from retention SSPP stipends in accordance with the SSPP's W-4.

## **9. PHASE 1 REPORTING REQUIREMENTS**

### **9.1. Reporting Requirements Overview**

SSPPs submit, at their own expense, documentation and information requested by the SSP. Updated SSPP reporting information is available on the SMART website. Failure to timely provide reporting may result in the SSPP being placed in a status of non-compliance or dismissed from the program.

### **9.2. Official Transcripts**

SSPPs submit official transcripts from the academic institution within 30 days after the end of each academic term.

### **9.3. Annual Report**

SSPPs submit an Annual Report to the SPO on or before 1 June each year during phase 1. The Annual Report tracks and projects completion of degree requirements, projects number of internships, projects work start date, discloses outside funding, discloses outside employment, discloses health insurance information, discloses study abroad activities, and reports SSPP research, achievements, and activities.

### **9.4. Phase 1 Hiring Reporting Requirements**

Prior to degree completion, SSPPs provide updated degree completion, degree conferral, and work start dates.

Participant Type	Requirement	Details	Due no Later Than
All	Updated Completion Date	Date on which all degree requirements are completed.	Three months prior to graduation
All	Updated Conferral Date	Date on which the degree will be bestowed. This is noted on the official transcript reflecting the degree earned.	Three months prior to graduation
Recruitment	SF Offer Letter and Acceptance	Official offer of employment from the SF and the SSPP's acceptance. If the work start date is not reflected on the offer, report the date to the CA. Include any pertinent email messages with the SF.	As soon as received
Retention	Retention Work Start Date	Date on which SSPP anticipates returning to work at the SF.	As soon as identified
All	Official Final Transcript	Official final transcript from registrar reflecting conferral of the degree funded and date conferred.	As soon as available

## 10. PHASE 1 ACADEMIC REQUIREMENTS AND PROCEDURES

### 10.1. Academic Requirements and Procedures Overview

SSPP academic performance is foundational to maintaining SF capabilities. This performance ensures that qualified individuals are provided through SSP scholarships with STEM skills in disciplines that are critical to the national security functions of the DoD workforce.

### 10.2. Completion of Degree Requirements During Phase 1

SSPPs complete all degree requirements during phase 1, including thesis/dissertation writing, edits, defense, etc.

### 10.3. Minimum GPA Requirement

SSPPs maintain a minimum cumulative GPA of 3.0 on a 4.0 scale from the academic institution(s) for which they receive SMART funding. After a SMART award is funded, only the grades for the degree funded by SMART are used to calculate the SSPP's GPA. If the SSPP fails to maintain the required GPA, the SSPP may be placed in an auditable status of non-compliance and/or dismissed from the program.

### 10.4. Failure to Complete Degree with Required GPA

SSPPs who do not complete the degree funded with a cumulative GPA of 3.0 on a 4.0 scale do not successfully complete phase 1. SSPPs who cannot be hired by the SF based on their failure to meet SSP academic requirements will be dismissed from the program.

### 10.5. Incomplete Coursework

SSPPs complete all coursework on time and in accordance with the EWP. Incomplete coursework is receiving a grade of incomplete for a registered course and does not constitute adequate progress

toward degree completion as reflected in the EWP. If an SSPP earns an incomplete, the SSPP may be placed in an auditable status of non-compliance and/or dismissed from the program.

### **10.6. Full-Time Status**

SSPPs maintain full-time enrollment status with their approved academic institution(s). During phase 1, SSPPs continually pursue the funded degree on a full-time basis.

### **10.7. Participation in Study Abroad Programs**

SSPPs may engage in a study abroad program if the following conditions are met:

- a. The study abroad coursework is for credit;
- b. The study abroad tuition and fees are payable to a U.S. institution; and
- c. The SSPP submits the Foreign Travel Notification.

The SSP does not provide additional funding for travel or other fees related to study abroad programs beyond the standard tuition and related educational fees. SSPPs personally fund these activities.

### **10.8. Participation in Fieldwork, Conferences, Meetings, or Training**

SSPPs may study or engage in research fieldwork, conferences, meetings, or training away from the academic institution for which they receive funding. SMART does provide additional funding for fieldwork, conferences, meetings, or training beyond the standard tuition and related educational fees. SSPPs personally fund these activities.

### **10.9. Retention SSPP Return to SF during Phase 1**

In certain circumstances, a retention SSPP may return to the SF to conduct research and/or thesis or dissertation writing based on ideal equipment or facilities available at the SF. Retention SSPPs request prior approval from the SPO.

## **11. SECURITY CLEARANCE**

### **11.1. Security Clearance Overview**

The nature of work performed at SFs requires employees to be eligible to maintain at minimum a SECRET level security clearance. Depending on the needs of the SF, the clearance level required may be higher than SECRET. For additional information, please reference <http://www.OPM.gov>.

### **11.2. Security Clearance Requirement**

SSPPs complete the following security clearance requirements:

- a. Provide complete and timely information and documentation as requested;
- b. Be eligible to timely obtain the level of security clearance required by the SF;
- c. Be eligible to maintain the required level of security clearance through completion of the service commitment;
- d. Notify the program prior to traveling to a foreign country; and



- e. Notify the SMART security specialist immediately of any actions or events that may affect eligibility to obtain or maintain the security clearance. For a list of activities that may result in the denial or revocation of a security clearance visit <http://www.OPM.gov>.

### **11.3. Denial of SSPP Application for Security Clearance**

If an SSPP's application for the security clearance is denied, the SSPP will be dismissed from the program.

### **11.4. Revocation of SSPP Security Clearance**

If an SSPP's security clearance is revoked at any time prior to completion of the service commitment, the SSPP will be dismissed from the SSP.

### **11.5. Security Clearance and Start of Service Commitment**

SFs usually require the security clearance be in place prior to start of the service commitment. If an SSPP's security clearance has not been finally adjudicated by degree completion, the SSPP may be dismissed from the program.

### **11.6. SSPP Foreign Travel**

Foreign travel is any travel outside the United States, its Territories or Possessions. Foreign travel may affect eligibility to obtain and maintain a security clearance. SSPPs notify the SPO before traveling to a foreign country.

## **12. MENTORING**

The SF provides a professional mentoring program for its sponsored SSPPs. Each SSPP is assigned a mentor who is aligned with the SSPP's STEM discipline. The mentoring program acclimates SSPPs to their SF and fosters professional growth.

## **13. COMMON ACCESS CARDS**

The common access card (CAC) is a DoD smart card used for identification as well as for security authentication. CACs are issued by the SF. SFs usually require SSPPs to have a valid CAC to gain entrance to the SF and use the SF's computers or network.

Recruitment SSPPs confirm the CAC requirement and coordinate the CAC process directly with the SF well in advance of arriving for an internship. Recruitment SSPPs work directly with the SF to resolve any CAC questions or concerns.

Retention SSPPs retain their CACs issued by the SF. Retention SSPPs work directly with the SF to resolve any CAC questions or concerns.

## **14. MUTLI-YEAR RECRUITMENT SSPP INTERNSHIPS**

### **14.1. Multi-Year Recruitment SSPP Internship Requirement**

All multi-year recruitment SSPPs complete internships with their SF during phase 1. SSP internships provide an opportunity for SSPPs to make a meaningful contribution to the SF's mission, establish a positive working relationship with future co-workers and supervisors, and become familiar with the local area.

#### **14.2. Multi-Year Recruitment SSPP Internship Timing**

Internships begin the summer after initial funding. Internships are completed each year the award crosses a summer period. Internships are usually completed during summer months and range in duration from 8 to 12 weeks. SSPPs with alternative academic schedules such as year-round coursework, extended internship/co-op periods or other special requirements may request alternative timing or internship lengths.

#### **14.3. Multi-Year Recruitment SSPP Internship Waiver**

The internship requirement is rarely waived. A waiver of the internship requirement does not reduce the length of a SSPP's service commitment.

If an SSPP is unable to complete an internship because their application for the security clearance is not adjudicated in time due to government delay, or they are not eligible for an INTERIM clearance, the SSPP is required to complete 9 credit hours or the equivalent of full time coursework instead of completing the internship period.

#### **14.4. Multi-Year Recruitment SSPP Internship Funding**

Based on the availability of funds, eligible recruitment SSPPs completing internships may receive internship support payments (ISP) in addition to the monthly stipend. ISP are intended to help defray the cost of travel, lodging, meals, transportation, and incidental expenses.

#### **14.5. Multi-Year Recruitment SSPP Compensation Coverage Insurance**

In lieu of accident insurance, ASEE provides compensation coverage for recruitment SSPPs in the event of injury or illness incurred while performing an internship. Claim reporting requirements vary by jurisdiction. SSPPs who are injured or become ill as a result of performing internship duties must contact ASEE immediately or as soon as the SSPP is able (e.g. after seeking emergency medical treatment) by emailing ASEE at [smart@asee.org](mailto:smart@asee.org) or calling 202-331-3544. Failure to notify ASEE in accordance with statutory and/or policy requirements may result in rejection of a SSPP's claim. If the initial notification is made by telephone the SSPP must also follow up in writing. SSPPs who wish to receive reporting details for the internship location may email [smart@asee.org](mailto:smart@asee.org). When making this request, SSPPs must specify whether the request is to request information or to report an injury/illness. Compensation coverage is not health insurance. Please refer to section 8.4 for more information on the health insurance allowance provided to SSPPs.

### **15. MULTI-YEAR RETENTION SSPP SUMMER WORK PERIODS**

#### **15.1. Multi-Year Retention SSPP Summer Schedule Notification**

During the summer months, multi-year retention SSPPs generally return to work full-time with their SF. The SF may waive a summer work period to enable the SSPP to complete coursework or research.

Retention SSPPs notify the SPO whether they will complete a summer work period with the SF or complete coursework. This notification is due on or before 1 March each year the award crosses a summer period.

#### **15.2. Multi-Year Retention SSPP Summer Work Period Travel**

Retention SSPPs living and attending school at a location greater than 50 miles from their employing organization may receive funding for travel expenses to return to the SF for a summer work period.

Retention SSPPs who are eligible for travel funding contact the CA for assistance. Retention SSPPs book approved travel via Defense Travel System (DTS) with the SF.

### **15.3. Multi-Year Retention SSPP Compensation Coverage Insurance**

Retention SSPPs remain employees of their SF during phase 1 and are covered under their SF's workers compensation policy while performing duties at their SF. Retention SSPPs comply with the SF's workers compensation policy and notification requirements.

## **16. SERVICE COMMITMENT HIRING PROCESS**

SFs hire SSPPs as full-time federal civilian employees for completion of the service commitment. The hiring process varies among facilities and may include an application process. SSPPs complete all necessary steps to accept employment with the SF. SSPPs may complete application materials and provide supplemental documentation at their expense such as curriculum vitas, references, and official transcripts. SFs confirm with the SPO that the SSPP has successfully completed all phase 1 requirements before hiring the SSPP for phase 2. If the SF cannot hire an SSPP for completion of the service commitment because the SSPP is in non-compliance, the SSPP may be subject to debt repayment procedures.

## **17. PHASE 2 PROCEDURES**

### **17.1. Transition to Phase 2 and Phase 2 Letter**

Upon verified completion of all phase 1 requirements, the SPO will issue a Phase 2 Letter to the SSPP and the SF. The Phase 2 Letter serves as written confirmation that the SSPP has completed all phase 1 requirements. The Phase 2 Letter also provides degree completion and conferral dates, the name and location of where the SSPP will complete the service commitment, basic award information, and service commitment start and end dates.

### **17.2. Start of Phase 2**

Phase 2 begins on the work start date. The work start date is the day on which a SSPP begins the required post-graduation service with the SF after completion of all phase 1 requirements. SSPPs begin the service commitment within 60 days of degree completion. Requests for a short delay to commencement of the service commitment require the prior authorization of both the SPO and the SF. SSPPs generally do not defer or otherwise delay their service commitment to pursue a degree outside of the SSP during phase 2. Pursuit of a subsequent degree may not interfere with completion of the service commitment.

### **17.3. Length of Service Commitment**

The period of obligated service for educational financial assistance received by an SSPP shall be the period determined by ASD(R&E) as being appropriate to obtain adequate service in exchange for such financial assistance. The period of service required of an SSPP may not be less than the total period of pursuit of a degree that is covered by such financial assistance and may not be less than one year.

The SSP requires a minimum of 1 year of post-graduation employment for all SSPPs. SSPPs perform post-graduation employment with the SF at the rate of 1 calendar year of service for each full academic year (generally 9 months). Financial support for an academic term (quarter, semester) that is less than a full academic year requires an additional 6 months of post-graduation employment. For example, an

award for two academic years requires 24 months of service. An award for one and a half academic years requires 18 months of service.

The SMART service commitment is in addition to any other period for which the SSPP is obligated to serve in the civil service of the United States.

Time spent working at the SF during phase 1 is not applied toward fulfillment of the service commitment. Accordingly, recruitment SSPP time spent during internships is not applied toward the service commitment. Similarly, retention SSPP time spent at the SF during the academic year or summer months is not applied toward the service commitment.

#### **17.4. Completion of Service Commitment with Approved SF**

SSPPs complete the service commitment with the SF approved by the SPO. SSPPs may not choose to complete the service commitment with another facility.

#### **17.5. Full-Time Federal Civilian Employment**

SSPPs work as full-time federal civilian employees for the SF in phase 2 until the service commitment is fulfilled. SSPPs may pursue an additional degree during phase 2 outside the SSP if the SSPP continues to work full-time for the SF.

#### **17.6. Failure to Complete the Service Commitment**

SSPPs fulfill the service commitment and satisfactorily perform employee duties and responsibilities. If an SSPP fails to properly complete the service commitment, the SSPP will be dismissed from the SSP and may be dismissed from the program and required to repay the entire award amount.

#### **17.7. Phase 2 Salary and Benefits**

SSPPs work directly with the SF to obtain information about salary, benefits, and relocation costs. SFs are usually not able to provide relocation costs; accordingly, SSPPs should anticipate paying for relocation and travel to the SF themselves. Information regarding federal salary levels may be found at [www.OPM.gov](http://www.OPM.gov).

### **18. PHASE 2 REPORTING REQUIREMENTS**

#### **18.1. Phase 2 Service Commitment Reporting Requirements**

Shortly after beginning the service commitment with the SF, SSPPs provide the SPO with employment verification documentation and updated contact information. SSPPs provide these documents to the CA.

<b>Participant Type</b>	<b>Requirement</b>	<b>Details</b>	<b>Due No Later Than</b>
All	Updated Personal Contact Information	Confirm or update personal contact information including mailing address, telephone number(s), and email address(es).	2 weeks after work start date
All	Updated Professional Contact Information	Confirm or update professional contact information including telephone number and email address.	2 weeks after work start date
All	Updated Supervisor Contact Information	Confirm or update the supervisor's name and contact information.	2 weeks after work start date

Recruitment	SF-50	Notification of personnel action hiring SSPP as a full-time federal civilian employee. Available from the SF human resources office after work start date.	6 weeks after work start date
Retention	Employment Verification	Documentation confirming the SSPP is a fulltime federal civilian employee of the SF, including work start date. May be provided in an email from the SF and/or a new SF-50.	6 weeks after work start date

## **18.2. Phase 2 SMART Participant Success Story**

The Phase 2 SMART Participant Success Story is a summary of the SSPP's involvement in the SSP, including the SSPP's academic, research, and professional interests, as well as the SSPP's achievements and goals. The purpose of the Success Story is to obtain information on the evolution of SSPPs from scholars to professionals and how the SSP assisted in the journey. The Success Story also gathers information on SSPP's long-term professional goals. SSPPs may be requested to complete a success story. If requested, the CA will provide the SSPP with a success story template. Success stories are usually provided to the CA within 3 months of beginning the service commitment.

## **18.3. Current Contact Information**

SSPPs keep current contact information with the SPO at all times, including accurate email address(es), mailing address, and telephone. SSPPs update the SPO immediately with changes or updates to their contact information by emailing the CA.

## **18.4. Change in Security Clearance Eligibility**

SSPPs notify the SMART security specialist immediately of any change in their eligibility to obtain or maintain the security clearance required by the SF.

# **19. PHASE 3 PROCEDURES**

## **19.1. Transition to Phase 3 and Phase 3 Letter**

Upon completion of all phase 2 requirements, the SPO will issue a Phase 3 Letter to the SSPP and the SF. The Phase 3 Letter serves as written confirmation that the SSPP has fully completed phase 2 and outlines phase 3 requirements. During phase 3, the SPO tracks SSPP employment status for 10 years to obtain information on SSPP retention rates within the DoD.

## **19.2. Phase 3 Reporting Requirements**

SSPPs keep current contact information with the SPO at all times, including accurate email address(es), mailing address, and telephone. SSPPs update the SPO immediately with changes or updates to their contact information by emailing the CA. SSPPs may be requested to provide the SPO with updated employment information.

## ABBREVIATIONS AND ACRONYMS

ASD(R&E)	Assistant Secretary of Defense for Research and Engineering
ASEE	American Society for Engineering Education
CA	cohort administrator
DFAS	Defense Finance and Accounting Service
DTS	Defense Travel System
EWP	Educational Work Plan
FMR	Financial Management Regulation
GPA	grade point average
IRS	Internal Revenue Service
ISP	internship support payments
POC	point of contact
SF	sponsoring facility
SMART	science, mathematics, and research for transformation
SPO	SMART Program Office
SSA	SMART Service Agreement
SSP	SMART Scholarship Program
SSPP	SMART Scholarship Program Participant
STEM	science, technology, engineering, and mathematics

## GLOSSARY

academic term. An academic term is a division of the academic year. Depending on how the academic institution structures its classes, an academic term may consist of a quarter or a semester.

academic year. An academic year in the SSP consists of the fall through spring academic terms and is generally nine months in length. An academic year does not include the summer term.

award. An award in the SSP is an offer of scholarship for the completion and conferral of a specific degree in accordance with the SSA exchange for a period of obligated service.

award funding. Award funding occurs at the time SSP funds are expended on behalf of a SSPP.

award year. An award year refers to an SSP funding year which generally begins 1 August and ends 31 July.

cohort. A cohort refers to the group of SSPPs who received a SMART award in a particular year.

debt repayment. The procedure for recovering funds determined due the Federal Government under a SMART award based on a SSPP's withdrawal or dismissal from the SSP prior to completion of the service commitment.

degree completion. Degree completion refers to the date on which an individual completes all requirements to complete a degree. This date generally occurs prior to degree conferral and is not set forth on official transcripts. The degree completion date may be the same as the degree conferral date.

degree conferral. Degree conferral refers to the date on which a degree is bestowed upon an individual. This date is set forth on the official transcript reflecting the degree earned. The degree conferral date may be the same as the degree completion date.

dismissal. Dismissal is the process to remove a SSPP from the SSP based on the SSPP's failure to comply with SSP policy, procedure, and/or SSA.

incomplete coursework. Incomplete coursework is receiving a grade of incomplete for a registered course and does not constitute adequate progress toward degree completion as reflected in the EWP.

mentor. A mentor is an experienced individual who assists and guides another person's professional development. SSP mentors may coordinate internship logistics and assist SSPPs in educational and professional growth.

multi-year SSPP. A multi-year SSPP is an SSPP whose award length is more than one academic year.

program phases. SSPPs complete three SSP phases: degree pursuit, service commitment, and monitoring.

phase 1. Phase 1, degree pursuit, begins at the time a SSPP accepts a SMART award by signing the SSA and ends upon verified completion of all phase 1 requirements. During phase 1, SSPPs complete requirements to obtain the degree funded and internships, if required. As SSPPs near completion of phase 1, they work with the SF, SPO, and service liaison to prepare for the start of the service commitment.

phase 2. Phase 2, service commitment, begins upon the work start date and ends upon completion of the required post-graduation service. The work start date is the day on which an SSPP begins the service commitment with the SF after verified completion of all phase 1 requirements. Once phase 1 is verified completed, the SPO provides written confirmation of official entry into phase 2, including service commitment start and end dates. During phase 2, SSPPs complete the service commitment by working full-time for their SF.

phase 3. Phase 3, monitoring, is a 10 year employment status monitoring period that begins upon completion of the service commitment. During phase 3, the SPO tracks SSPP employment status for 10 years to obtain information on SSPP retention rates within the DoD.

recruitment SSPP. A recruitment SSPP is an SSPP who is not employed in a permanent civilian position by the SF at the time of award. Participants who are employed by the SF in temporary or internship positions at the time of award are recruitment SSPPs.

retention SSPP. A retention SSPP is a participant who is employed in a permanent civilian position by the SF at the time of award.

satisfactory academic progress. Maintenance of a 3.0 GPA on a 4.0 scale within the criteria defined in the SSA and maintaining adequate progress toward degree completion as reflected in the EWP and SSA.

scholarship. A financial award for full-time study leading to a STEM degree.

scholarship-for-service. Scholarships-for-service refers to programs that provide scholarship funding in exchange for an agreement to complete a period of employment after degree completion or conferral.

security clearance. A security clearance is an authorization issued primarily by the Federal Government permitting an individual access to sensitive and classified information.

service commitment. The period of service for an SSPP determined by the DoD as being appropriate to obtain adequate service in exchange for financial assistance.

SMART Scholarship Program. The SMART Scholarship Program is the Science, Mathematics, and Research for Transformation Defense Education Program.

SMART Scholarship Program Participant. A SMART Scholarship Program Participant is an individual who has received and accepted a SMART award. An individual remains a participant throughout all three program phases. An SSPP may also be referred to as a “participant.”

SMART Service Agreement. The SMART Service Agreement is a written to enter into or continue in the employment of the DoD for the period of obligated service for a period determined by the DoD as being appropriate to obtain adequate service in exchange for the SMART scholarship.



sponsoring facility. A sponsoring facility is a particular laboratory or agency within the DoD Component that participates in the SSP.

United States citizen. A United States citizen is an individual who was born or naturalized within the United States and is subject to the jurisdiction of the United States. SMART scholarships are available only to U.S. citizens who are 18 years or older.

work start date. The work start date is the day on which an SSPP begins the required post-graduation service with the SF after verified completion of all phase 1 requirements.