

POLICIES AND PROCEDURE

R. CLIFTON BROOKS, JR. MEDICAL RESEARCH FELLOWSHIP

- I. Background. Robert Clifton Brooks, Jr., a resident of Culpeper County, VA, died on September 26, 1978. By Article V of his will dated June 12, 1970, Mr. Brooks devised and bequeathed his entire estate (less only his library which he left to the Culpeper Town and County Library) to the Sons of Confederate Veterans (S.C.V.) to be held as a special endowment fund as follows:

All the net income from such fund shall
Be used for the furtherance of medical research
Through post-doctoral fellowships and/or
Research professorships at any accredited
medical school. I specifically direct,
however, that no payments of the principal shall
be made. (Will of R. Clifton Brooks, Jr.,
Article V. section 1.)

After setting forth the provisions concerning eligibility for grants, Mr. Brooks
Provided:

The times at which such grants shall
be awarded, the conditions attached to
such grants and the purposed and periods
for which such grants are awarded. . . .
shall be within the discretion of the
Executive Council of the S.C.V., and my
Executors shall not be required to see to
the application of any of such funds.

The General Executive Council (GEC) of the SCV. has delegated the
administration of the R. Clifton Brooks, Jr. Medical Research Fellowship to the
Brooks Fund Committee.

II. Eligibility.

1. (a) To be eligible for consideration an applicant for a fellowship must be related to a member of the armed forces of the Confederate States of America (either military or naval) in such manner and degree as would support the applicant's admission as a member of the Sons of Confederate Veterans and shall be subject to such evidence of that relationship as normally would warrant acceptance into the SCV under its procedures as in effect from time to time as

applications are made hereunder. In a case where an applicant would encounter substantial difficulty in meeting the level of proof normally required for admission to the SCV, the Committee may, but is not required to, accept affidavits from third parties or other evidence that the Committee may deem appropriate under particular circumstances. Nothing herein shall be deemed to deny consideration of a female applicant, and for purposes of applying these procedures a female shall be deemed eligible for membership in the SCV.

(b) The holding of public office, either elected or appointed, of the Confederate States Government or of any of the thirteen Confederate States or of any county or city in any of such states shall constitute the equivalent of military service provided, however, that any such civil office may not have been held under any government established by the United States in any of the Confederate States. In addition, all ancestors in the line of descent from such qualifying ancestor to the fellowship applicant (or, in the case of a collateral ancestor, in the line of relationship to such qualifying collateral ancestor) shall have been legitimate.

(c) Membership in the SCV, United Daughters of the Confederacy, or Children of the Confederacy shall be accepted as evidence of eligibility hereunder, but no such membership shall be required. A letter from an official of any such organization or of a local camp or chapter thereof will serve as proof of membership in such organization.

2. The determination of eligibility of a proposed project will involve an analysis of the type of research to be undertaken, the process and steps envisioned and the goals involved. In all cases, however, the applicant must have received a doctorate level degree (for example, a doctor of medicine degree or a doctor of philosophy degree in a field related to medicine) by the time the first payment of a fellowship award is to be made to him.

III. Application Requirements. Applicants shall provide at least the documentation set forth in this section, and no application shall be considered complete until all required documentation has been received by the Committee.

(a) A personal letter of application addressed to the Committee. The application shall be typed and shall include the following:

- (1) a description of the nature of the research to be undertaken, and the benefits to be derived therefrom;
- (2) the career history of the applicant to date;
- (3) the applicant's professional goals if the applicant is not at the time of application in the ultimate position he seeks;

- (4) all other pertinent information which the applicant feels should be brought to the attention of the Committee; and
- (5) A personal data form dealing with other items of the applicant's personal history that, in the view of the applicant, may be of interest to the Committee.
- (b) Three letters of recommendation attesting to the applicant's character and dependability. At least one such letter shall be from an educator or other person in position to judge the applicant's probability of success to the field of medicine. At least one such letter shall be from a person who can judge the applicant's dependability in a work situation. Letters of recommendation from relatives are not acceptable.
- (c) Copies of transcripts indicating the type, amount and quality of applicant's prior to medically-related academic work.

IV. Amount and Frequency of Awards.

- (a) In view of the restriction concerning expenditures of principal found in the will of R. Clifton Brooks, Jr., the total amount of fellowship aid to be awarded during any calendar year shall not exceed the income of the fund net after investment and administrative expenses and reasonable expenses incurred by the members of the Committee in the discharge of their duties. The Committee shall have discretion as to the number and amount of fellowships to be awarded during a calendar year within the income limitation.
- (b) Fellowships normally shall be awarded for a one-year period and shall not be renewable. Where, however, it is contemplated that the project for which fellowship aid is sought will require more than one year for its completion, the committee, at its discretion, may award a fellowship for a longer period.
- (c) Normally, the Committee will award the full amount of the year's income in fellowships. Where, however, the Committee does not approve any application forwarded to it or concludes it is advisable to accumulate income in order to have on hand income in excess of the fund's projected annual income for a particular project, reasonable accumulation of income may be made.

V. Notification to Candidates and Announcement of Selections.

- (a) Candidates selected for fellowships shall be notified as soon as possible after final selection has been made, by letter or telephone call, as deemed appropriate by the Committee. Selection shall be published in Headquarters Bulletin, as well as in publication of any appropriate S.C.V. camp (as, for example, in the applicant's home area) and news releases shall be provided the recipient's home town newspaper and other media.
- (b) Unsuccessful applicants shall be notified as soon as possible after they have been eliminated from further consideration in order to minimize rumor and speculation and to provide an unsuccessful candidate with more time in which to seek aid elsewhere. All unsuccessful candidates should be thanked for their

interest and effort and informed that non-selection should not be considered as any failure or unworthiness on their part.

VI. Miscellaneous.

- (a) Team grants will be awarded only if all applicants satisfy the eligibility requirements.
- (b) Successful applicants are to be advised that periodic reports of their progress are to be provided the committee with the first report to be received no later than the mid-point of the projected fellowship. A final report is to be forwarded to the Committee no later than 30 days following the receipt of the last fellowship payment. If the first periodic report has not been received before the due date for the next payment following the mid-point of the fellowship period, that payment and all future payments shall be suspended until such report is received. Successful applicants agree they will acknowledge the Brooks Fund and the Sons of Confederate Veterans (SCV) as the source of funding in any publications and presentations of the research results.
- (c) The Committee normally will make its selection without personal interviews of applicants. If, however, an applicant requests a personal interview and the committee elects to grant the request or if the committee desires a personal interview in a particular case, all applicants for fellowships for that period will be so advised and provided an opportunity to appear in person. In view of the logistical difficulties and cost, personal interviews normally will be discouraged.
- (d) These policies and procedures shall become effective upon their acceptance by the Executive Council and may be amended only with Executive Council approval.

* * * *