

WELCOME TO TUITION EXCHANGE



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This April 15, 2024 edition of the TE Liaison Officer Handbook is written taking into consideration the adoption of the new TE Administrative computer system.

TUITION EXCHANGE (TE) HANDBOOK

As the Tuition Exchange Liaison Officer (TELO), you administer a campus scholarship program that is part of a growing network of more than 690 colleges and universities across the United States and five countries. The institutions have joined to provide scholarship exchange opportunities for students with an eligible family member employed at a participating institution. Over 7,500 students attend Tuition Exchange (TE) member schools on TE scholarships yearly.

The fundamental mission of Tuition Exchange is to advance higher education by making careers at colleges and universities more attractive through offering scholarship opportunities. TE strives to balance the success of over seventy years of experience and the energy demanded by the demographic and institutional changes confronting higher education today. TE's Board of Directors and staff are committed to addressing constructive change while maintaining the quality of TE's exceptional core program. The TELO's Handbook (Handbook) is written to provide the tools and guidance necessary for a thriving campus program. You must understand TE's policies and procedures to fully utilize Tuition Exchange's flexibility. The handbook includes TELO's role, a glossary, a summary of the policies your institution should have to guide the program's administration, and sample materials.

The website, www.tuitionexchange.org, has current news and information about the TE program and its members. You are encouraged to check it often. All TE webinar recordings, presentation slides, and additional handouts are posted on this portal. TE Central welcomes inquiries from TELOs about any aspect of the program and its policies. Contact information is provided within this document and on the Tuition Exchange website.

We look forward to working with you.

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Introduction to the Tuition Exchange Program

History

Tuition Exchange was founded to advance higher education and to make careers in higher education more attractive. The underlying concept originated in the tradition of remitting or reducing tuition costs for faculty children attending their home institution. Vanderbilt University has offered "tuition discounts" to faculty and staff children since its founding in 1875. In 1901, the trustees of the University of Chicago voted to provide "tuition assistance" to faculty children. During the depression of the early 1930s, the availability of tuition-remission programs rapidly increased; today, such programs are in place at many American colleges and universities.

In 1947, Dean Robert R.R. Brooks of Williams College introduced multi-institution exchanges (as distinguished from one-to-one student exchanges). In 1952, forty-one colleges and universities joined to create the Faculty Children's Tuition Exchange. Following a 1953 study on the post-war economic status of college teachers by the Teachers, The Insurance and Annuity Association (TIAA) and the Ford Foundation Fund for the Advancement of Education made a generous grant to support the exchange program. On May 28, 1954, Tuition Exchange (successor to the Faculty Children's Tuition Exchange) was incorporated.

From 1954 to 1972, Williams College served as headquarters for Tuition Exchange. From 1972 to 1993, Muhlenberg College served as host to the organization under the leadership of G. N. Russell. Smart. In August 1993, the organization's headquarters moved to the Washington, D.C. metro area. Since 2010, TE Central's "virtual" office has been in Bethesda, Maryland, just outside Washington, D.C.

Membership

Tuition Exchange (TE) is a nonprofit consortium of more than 700 colleges and universities. Its participating institutions are in 48 states, the District of Columbia, and abroad. One of TE's strengths is the diversity of its membership: major universities and liberal arts colleges, highly competitive and moderately competitive institutions, public and private, and members with specialized curricula and comprehensive institutions.

Membership in TE is open to all regionally accredited public, nonprofit, and for-profit higher education institutions. Members of this consortium provide its eligible employees with the opportunity for them and eligible family members to apply for a TE scholarship to study at any other TE member school. A board of directors governs TE. TE Board members are drawn nationally from the higher education community. More than 8,000 students receive TE scholarships annually.

Universal and Institutional Rules

Fundamental Principles

The fundamental operating principle is *exchange*. Members benefit from the opportunity to send employee-eligible students to other institutions. Likewise, the School commits to hosting an approximately equal number of students. No money changes hands, and no accounting is done for the variation among tuition charges. *Flexibility* is another characteristic of TE. Tuition Exchange has a few umbrella policies and procedures, but within these, colleges and universities have considerable leeway to structure the program as they see fit.

Each member institution is obligated to:

- Limit the exchange to eligible employees and immediate family members.
 - Former employees may be included based on individual institutional guidelines.
- Establish equitable eligibility policies and set forth criteria for determining how employees will be considered eligible for TE scholarship considerations (Export) and have, if necessary, a mechanism to determine how eligible employees are prioritized.
- Establish guidelines for awarding scholarships (imports) and determine the number of new TE scholarships awarded each new academic year.
- Have an explicit commitment to honor all commitments made to Import and Export scholars.
- Appoint a responsible employee as the primary campus TE Liaison Officer (TELO). This individual is accountable for overseeing, completing, submitting, and reviewing the initial Enrollment Summary no later than September 30, reviewing the

Enrollment Summary quarterly, and paying the annual membership dues and participation fees on time.

- In the case of TE schools utilizing Double Credit 3 (DC3) schools, each DC 3 import is charged the annual participation fee.

Institutional Policies

- Each member institution establishes its policies and procedures for administering its TE program within the framework described above.
- The purpose of the handbook is to assist TELOs with the day-to-day operation of the TE program.
- TELOs must maintain the Institution's TE policies, which were prepared when the institution became a member of TE and updated as needed.
- TE Central has a variety of documents available on the website inside the Liaison Officer tab to assist you in creating, updating, modifying, and even comparing your policies.

A Typical Path to a TE Scholarship

Perhaps the best way to introduce the TELO to the TE program is to provide an example of a student's path to obtaining a TE scholarship.

"Susan" is a 17-year-old high School junior beginning to look seriously at colleges and universities she might want to attend. Her mother, the comptroller at Omega University, receives an email from Human Resources about the Tuition Exchange program. The email provides the following details:

1. Link to the Tuition Exchange home page.
2. Omega University's TE policy and employee eligibility guidelines.
3. Contact information for the Export TELO.
4. Invitation to attend a 'Lunch and Learn' for additional information.
 - a) Speakers include the TELO, Director of Admission, and Financial Aid Director
5. Omega University's FAQ documents detailing:
 - a) TE Application process and deadlines
 - b) Length of support
 - c) The transfer process, if applicable
 - d) Institutional Renewal process, if applicable
 - e) What happens should the employee be terminated?

Omega is the home Institution, and Susan is considered an export of Omega. Omega's policy is to provide for a maximum of five exports annually. Susan's dependent is an eligible export for the following academic year.

After investigating the member institutions to narrow her search, Susan applies for admission to four schools, including one "safety" school. The family completes the TE-EZ Online Application listing each School on the TE-EZ Online Application. Each institution

may contact Susan directly about further application procedures and the TE award process at their school.

Susan is offered a TE scholarship at three schools and enrolls at Alpha College with a TE scholarship. She is an **import** of Alpha College's program. As a courtesy, she notifies the other schools about her decision.

Susan has attended Alpha College for four years. Omega honors its commitment to her yearly and re-certifies her as a continuing TE scholar. Her mother is thrilled that Susan has received an exemplary education at an excellent institution at a markedly reduced rate.

Role of the TELO

Introduction

The success of the Tuition Exchange program depends upon the primary TELO. The TELO is the principal point of contact for TE Central, eligible employees and their families, students applying for TE import scholarships, and TELOs at other member schools. The TELO work is seasonal, with peak periods typically early and late in the fall semester and again early and late in the spring semester. The time required to administer the TE program on any campus is difficult to estimate. It depends on the number of participating students, and it requires work on the part of the individual's workload.

Colleges and universities assign the TELO role to different categories of employees. Approximately 43% are Financial Aid Officers, 26% work in Human Resources or Personnel Offices, 14% are in Finance and Administration Offices, and 13% are Deans in Academic Affairs or Registrars. A few are faculty members.

Summary of Responsibilities of TELOs

The administrative responsibilities of TELOs fall into the following broad categories:

- a) To create and share equitable TE policies that are administered fairly.
- b) To advise faculty, staff, and their families about the TE program.
- c) To certify the eligibility of faculty and staff family members who apply for TE scholarships at other institutions.
- a) To monitor the eligibility of "exports" as TE Central requires.
- b) To monitor the eligibility of "imports" each semester.
- c) To monitor whether "export" and "import" applicants enroll.
- d) To maintain a reasonable balance between "exports" and "imports" as measured in semester units.
- e) To comply with limitations and restrictions imposed by Tuition Exchange.

- f) To resolve exchange problems with TELOs at other member institutions.
- g) To report, each year, no later than September 30, to TE Central the names of "export" and "imports," both new and renewed.
- h) To complete the TE Annual Aid profile.
- i) To maintain up-to-date TELO information inside the school's TE portal.

Disclaimer: It is The Tuition Exchange, Inc.'s policy that TE scholarships are granted by member institutions and not by Tuition Exchange, Inc. TE Central, therefore, accepts no responsibility for any misunderstanding between applicants and institutions concerning the selection and award process, amount or duration of scholarships, or any exceptional circumstances which might lead to early termination of a TE scholarship award.

Process for TE member institution closing, merging, or being acquired.

The goal is for all current students to continue with Tuition Exchange Scholarships (TES) and for all new applicants to retain their recertification/certification eligibility for TES and complete their educational programs.

In general:

Most TE member institutions will consider accepting transfers from closing schools and providing the TES. This is especially true when the transfer school was on the list of approved “teach-out” institutions provided by the closing school.

The importing TE school is expected to fund the TES for the TE students attending the import school. The exception would be the student’s failure to maintain renewal guidelines, including SAP, GPA, housing, etc. Import schools must inform all TES students of renewal requirements.

As the TELO, TE Central plays a key role in confirming the student's eligibility for TES consideration at the importing school.

The employee/student (family) pays an administrative fee based on the years needed to complete the academic program. The administrative fee covers the cost of the membership dues, participation fee, and administrative overhead costs for TE Central to act in the TELO role on behalf of the closed school that can no longer administer the program. The fee is \$300 for each year of TE certification eligibility for TES consideration. It is paid before the student is enrolled for the remainder of the academic program before the upcoming September enrollment. Note the family is paying for eligibility for TES. The import institution decides whether to award the TES and provides the funding for the TES. All emails will be sent to the student/parent employee, with copies sent to the TELOs at the applicable import schools, export schools, and TE staff.

Students will fall into one of the following categories:

1. Current Import:

Some imports cannot complete their academic program before school closes. The following provides TE Central's action steps on behalf of the closing school.

TE Central emails the student or parent employee indicating that the student must transfer to another school. If the student is seeking TES at new TE schools, the student must sign into his TE account, click Create Transfer Application, and complete the information listing the new schools he is considering.

No Tuition Exchange scholarship is guaranteed. The transfer student must apply for admission and be formally admitted. Most scholarship eligibility determinations are based on the transfer academic transcript. Not all TE member schools fund transfer students. The Import school will notify the student of his admission and scholarship status.

If the student transfers to a school that is not a TE member, then TES ends.

2. Closing School - New Import Applicant:

TE Central recommends that the closing school immediately deny all import applicants and indicate in the comment box “due to the school closing at the end of 202X-20XX (the current academic year).”

3. Closing School - Current Export:

TE Central will email all current TES students with the opportunity to continue TES at a new import institution beyond the export institution's closing. The email will offer them the opportunity to purchase continued TES certification eligibility for consideration of continued TES at the import school.

The offer is based on the information available in the TE Central portal. Only export students’ parents determined eligible by the closed school and a graduation date beyond the end of the closing semester will be emailed. The offer will detail the student's expectations, including maintaining enrollment at the new TE school until graduation. TE Central staff will serve as the student’s new TE Liaison officer.

TE Central charges a student or parent employee \$300 for each year of TES certification eligibility. The fee (for all remaining years) must be paid before the student is eligible for continued funding at the TE institution. The fee is due upon receipt of the email notice for continuing students returning to their current school. The fee is non-refundable.

First-time students seeking TES opportunities must remit payment by May 1. Transfer students: are expected to pay as soon as they are aware of a transfer award offer. Only current-year high school seniors are eligible to participate. The fee is non-refundable.

4. Closing School - New Export Applicant:

TE Central will email new exports who will be offered the opportunity to purchase four years of TES certification eligibility for consideration of getting TES and enrolling at a new import school. TE Central charges the student/parent employee \$1,200 for the four years of TES certification eligibility. The fee must be paid before the student enrolls at a TE institution with a TES from the importing institution. The fee is non-refundable.

5. Employee dependent currently attending closing school on tuition remission benefit paid by closing school:

There is one other potential group of new export applicants. Suppose any current faculty/staff dependents attend the closing school on tuition remission benefit. This student must transfer to another institution to complete their degree. This student can purchase TES certification eligibility for those TE member schools where the students would be seeking transfer admission.

The closing school's TELO should contact any students who would fall into this category. Instruct them to create a TE account and complete the online application. TE Central would email the students the offer to purchase TES certification eligibility as described above.

First-time students seeking TES opportunities or those transferring to a new TE school must remit payment by May 1. Only students currently receiving Tuition Remission are eligible to participate in this category. The fee is non-refundable.

Additional process for merging or acquiring a school.

Enrollment reports and balance sheets are combined.

If the school merges/acquires with a school that is not a TE member, the member can function as a separate TE entity within the new school (e.g., a college within the university or a separate academic program/professional school only) if the new school approves such an option.

TE Central, acting as the TELO, plays a crucial role in confirming the student's eligibility for TES consideration at the importing school.

The employee/student (family) pays an administrative fee based on the years needed to complete the academic program. The administrative fee covers the cost of the membership dues, participation fee, and administrative overhead costs for TE Central to act in the TELO role on behalf of the closed school that can no longer administer the program. The fee is \$300 for each year of TE certification eligibility for TES consideration. It is paid before the student is enrolled for the remainder of the academic program before the upcoming September enrollment. Note the family is paying for eligibility for TES. The import institution decides whether to award the TES and provides the funding for the TES. All emails will be sent to the student/parent employee, with copies sent to the TELOs at the applicable import schools, export schools, and TE staff.

For additional details contact Kristin Tichenor (ktichenor@tuitionexchange.org).

OVERVIEW

Inform Employees

The TELO is responsible for ensuring that eligible institutional employees are aware and informed about the TE program. TELOs assist interested candidates, exports, and their families with TE application procedures and field inquiries from TE applicants.

The specific venue depends on the institution's most effective communication channels. Some TELOs include information about TE in the campus newsletter, in new employee orientation sessions, in manuals, or on the Intranet. Some scheduled briefings. Some TELOs notify eligible employees after the human resources department has identified them.

TE Central has created tools for TELOs to share information with faculty, staff, and incoming students. The tools are available on the TE website, Liaison, and Family sections of the Tuition Exchange website, www.tuitionexchange.org

Tools include PowerPoint presentations, export and import checklists, an intro to TE 101, and various marketing information at no charge. These forms are available for download and TE member branding.

Offer Timely Advice to Exports

All eligible employees should have timely opportunities to learn about the TE program. Be sure to share how the eligible employee can take advantage of any available TE opportunities with plenty of notice. TELOs should:

- A. Make sure that your eligible employees know how to contact you.
- B. Be upfront and inform employees of any limitations on the TE program, especially limits on the number of TE scholarships the institution awards each year.
- C. Avoid raising expectations that cannot be met.

- D. Describe the awards as scholarships since TE scholarships are not employee benefits. Scholarships do not guarantee that the employing institution will be able to sponsor all eligible employees each year or that the institutions to which a student applies will accept the student and offer the student a TE scholarship. TE membership confers only the right to apply for a TE scholarship.
- E. Communicate with eligible employees 12 to 18 months before the prospective candidate enrolls in college.

Guide Exports through the Application Process

Throughout the process, the TELO aids candidates, and their families. The TELO approves the online form that is electronically transmitted to each School to which the student applies. Qualified applicants and eligible employees should be informed that the specific institution a student hopes to attend might not have enough places for all qualified applicants. Institutions with more TE applicants than they can accommodate are free to establish their criteria by which to choose among the applicants. TELOs should encourage candidates to apply to at least one "safe" School. A "safe" school is a TE member institution with a high ratio of acceptances and TE scholarship offers.

In November 2016, TE Central launched the TE-EZ Online Application. All member schools must use the TE-EZ Online Application beginning with the 2025-2026 application year.

Field Inquiries from Imports

The TELO should readily make available to import candidates (scholars from other institutions) and their TELO any information concerning the number of import scholarships to be awarded, any special requirements or conditions for an import scholarship, and all deadlines. This can be done by reviewing and updating the Member Survey (located inside the TELO portal) before the awarding process begins, but no later

than September of the year before awarding scholarships. Maintaining accurate information is especially important for campuses that need to attract more imports. The TELO should partner with the Enrollment Management Staff, the Financial Aid Office, and Human Resources to identify and court prospective import scholars and increase the likelihood of student enrollment.

Administration of Scholarships for Export Students

OVERVIEW

- A. The exporting or sending School certifies the TE application and terms of scholarship using the TE-EZ Online Application.
- B. Annually and before June 1, the exporting or sending school confirms that the eligible parent continues to be eligible so that their dependent student can continue to receive a TE scholarship.
- C. The student who withdraws or has a parent who is no longer eligible requires the student's expiration date to be updated.
- D. Students who take a one-semester Leave of Absence (LOA) are to be noted.
 - a. It is the responsibility of IMPORT TELOs to manage the LOA process.

Certification

The first step to applying for a TE scholarship is proof from the exporting or sending institution that they are eligible (certified as a TE scholar). The exporting or sending TELO is responsible for confirming that the candidate meets the requirements outlined in the Institution's TE eligibility policy. The TELO certifies that the employee (parent) has met the criteria by approving the Export TE-EZ Online Application. It is the student's responsibility to stay in contact with the Import school(s) TELO. TELOs will be required to use the TE-EZ Online Application for all applicants beginning with the 2025-26 application year.

The Certification/Application is a legal contract authorizing participation by the exporting School and committing a scholarship by the importing School. It is recommended that the TELO from the importing school provides a notice to the TE scholar spelling out all the award conditions.

It is the responsibility of the EXPORT TELO to ensure that the employee (parent) of the TE scholar is still eligible as stated in that institution's requirements. A TE scholar may be denied continuation when the employee (parent), whose eligibility conferred the right to apply for a scholarship, is no longer eligible under the institution's guidelines. The

receiving institution may deny renewal to TE scholars who have failed to meet the conditions (such as minimum GPA) and terms of the scholarship award. An applicant who received a multi-year scholarship can only be denied renewal *for cause*.

Providing exporting and Import eligibility guidelines to your TE scholars is essential. Lack of communication often causes misunderstandings. Be very clear regarding the issues of employee employment separation, termination, and retirement. Be sure to visit your Human Resource Department to learn about tuition remission or other exchange guidelines. All institutional policies should be in alignment.

Withdrawal or Temporary Leave of Absence (LOA)

The IMPORT TELO should know about a scholar's withdrawal or temporary LOA and update the student's record. An LOA is for a maximum of one semester. The student must complete a new TE-EZ Online Application if it takes longer. Students and their families have responsibilities in the process. The TELO must emphasize these in person, and all written materials must be shared with potential and actual TE scholars. The student or eligible employee should inform the exporting or sending TELO of which institution the student intends to enroll. This should occur as soon as the student formally accepts the institution's offer of admission and the TE scholarship, if applicable. At the beginning of each new term, the TELO must review the Enrollment Summary confirming that the parent and student remain eligible.

Should a TE scholar decide to take an LOA, transfer, or withdraw from an institution, the student or eligible employee should immediately notify the TELOs at both the sending and receiving institutions. When transferring, the student completes a new TE-EZ Online Application listing the new School (s). It is the responsibility of IMPORT TELOs to update the student's record.

Administration of Scholarships for Import Students

OVERVIEW

- A. TELO informs candidates of the school's decision regarding the TE scholarship application by approving the TE-EZ Online Application.
- B. It is strongly recommended that a second notification be sent to the student as well. Before the student's first year of college, these notifications may be shared with the eligible employee without worrying about violating FERPA. However, new or renewal award information should not be shared with parents once the student graduates high school or turns 18.
 - a The new TE system, available after July 1, 2024, asks the student to respond to a FERPA question. If the student responds yes, you have the student's permission to talk with only the eligible employee regarding the student's TE application.
- C. If in doubt, check with your Registrar.
- D. The TE-EZ Online Application and any corresponding documents are legal contracts.

Overseeing Certification

Excellent and Effective Practices for Exports

- A. Written policies disseminated in employee guides, manuals, etc. are a membership requirement.
- B. Eligibility (waiting period, employment status, status of new hires with eligibility from former employer) is clearly outlined, detailing priority for certification and competitiveness of the award process.
- C. Develop and share priority policy regarding Export candidate selection even if it isn't used.
- D. Senior administrator (and committee) appointed to monitor policy oversight.
- E. An officer/committee supports TELO.
- F. Ongoing, accurate, and realistic communication with faculty and staff.

- G. Families understand that a TE scholarship is an opportunity, not an entitlement or employee benefit.
- H. TE scholarship information should be grouped with other employee educational assistance programs, and their differences should be clearly outlined.

TELOs are the points of contact for other TELOs and candidates for import scholarships. Careful advice provided to TELOs and import candidates often prevents misunderstandings later.

Application Review

The application review begins when IMPORT TELO receives the TE-EZ Online Application notification. TELO is responsible for overseeing the progress of the TE-EZ Online Application through whatever import review and ranking process the institution has established.

As soon as possible, TE Central recommends that no later than April 1 (before September enrollment), the receiving TELO should notify the candidate and act within the TELO portal regarding the status of the candidate's application. TE should honor the May First, the national accepted student candidate's reply date. The monetary value of the scholarship awarded should be shared by completing the Annual Aid Year profile. If the IMPORT school has different expectations, such as living on campus, full-time students only, transfer student review must be shared in writing when the award is approved. If the student also applied for other forms of financial aid and the TE scholarship is part of a financial aid package, be sure the Financial Aid Office is notified of the award's approval. Some institutions attempt to balance the number of import scholarships in any given year with the anticipated number of export students. This is counterproductive and unnecessary because it is difficult to forecast accurately how many applicants will enroll. Some institutions convene a committee to decide how many imports to admit for the coming year.

Optional Program

An additional option was added to the Tuition Exchange membership options on July 1, 2014.

Double Credit 3 (DC 3)

DC 3 offers TE semester credit on the TE balance sheet for up to three students annually placed at the TE member school through other exchange programs. The TE member institution pays the TE participation fee per Import from another program to obtain credit.

Legal Status of TE Forms

The TE-EZ Online Application and the TE Membership Agreement are legal contracts.

TELOs should consider this when carefully and accurately completing these forms.

Although TELOs may delegate duties such as requisitioning forms or verifying enrollment to other staff members, these forms must be approved by the designated TELO. The documents should specify the terms and amount of the scholarship and any applicable limitations.

Good and Effective Practices for Imports

The awards system and schedule are in place with, at least, the program made public. A.

A senior administrator (and committee) has ultimate responsibility and oversight of the program.

- B. The TELO has good relations and frequently communicates with the college's admission staff.
- C. The TELO communicates regularly and timely with applicants.
- D. Each member Institution is expected to act ethically, honor their commitments, treat applicants and recipients like financial aid customers, and use correct verbiage when describing the program.

Overseeing the Import/Export Balance

OVERVIEW

A. Common Problems and Suggested Solutions

- a. Too few import applicants
- b. Too many import applicants
- c. Too few export applicants
- d. Too many export applicants

B. DC 3 The TE Board of Directors adopted Double Credit 3 (DC 3) at the June 2014 annual meeting.

DC 3 annually offers TE semester credit on the TE balance sheet for up to three students placed through other exchange programs. The TE member institution pays the TE participation fee per Import from another program to obtain credit. This allows school members to meet the "no less than three new annual TES offers" requirement when they have not had enough applicants considered for the award. A. There is no official sign-up action required.

B. The DC 3 option allows TE member schools to meet the minimum annual TES offer requirement.

C. Your School must participate in at least one other TE Central-recognized Exchange program to participate.

At this writing, the following list of TE Central approved eleven exchange programs. It is also available online in the TELO Portal inside the Instruction section.

TE Recognized Double Credit 3 Exchange Programs as of September 2022

1. Council of Independent Colleges
2. Council for Christian Colleges and Universities
3. Catholic College Cooperative Tuition Exchange

4. Association of Jesuit Colleges and Universities
5. Evangelical Lutheran Churches in America
6. Associated Colleges of the South
7. Great Lakes Colleges Association
8. Associated Colleges of the Midwest
9. Association of Presbyterian Colleges and Universities
10. Associated Colleges of the Twin Cities
11. International Association of Baptist Colleges & Universities

If your School participates in an exchange program not listed above, please send the AVP of Membership Services information for consideration.

On the Enrollment Summary Report, the program and the School are matched.

- A. Enrollment Report – select ADD new student.
- B. Enter the student TE ID number, typically the last 4 of the SSN C. Enter the Exporting School as the TE Central Recognized Program
- D. Enter the Importing School as your school.

The option has a cost—the annual per-student Participation Fee. Billing occurs when the enrollment report is submitted.

Discontinued TE Programs

The Export-Import 3 (EI3) program has been discontinued. The TE Board approved this decision when they eliminated the balance sheet requirements. The official announcement can be found in the appendix of the TE Handbook.

The TE Cooperative Program (Co-Op) has been discontinued. The TE Board approved this decision of the Directors at the June 2014 annual meeting.

The TE Board of Directors believes that with the changes to the Balance Sheet requirements, the E/I 3 and the TE Co-Op Program are no longer needed. Each TE member school's status is in Good Standing if it meets all financial obligations and does not have a high number of exports versus a low number of imports. TE Central will monitor schools that appear way out of balance on a case-by-case basis.

The Room Credit Program has been discontinued. The new TE administrative system cannot support the program and its credits.

Common Problems and Suggested Solutions

Too Few Import Applicants

Although some TE members report that, despite their best efforts, they have difficulty enrolling import students, many have devised successful approaches to increase applications:

- A. Offer additional financial incentives (fees, room, and board) to applicants for TE scholarships.
- B. Promote your School: Work closely with Enrollment Management, place table tents at admissions events, put announcements in Financial Aid materials, and add a question about the parent's place of employment to your admissions application.
- C. Investigate continuing and incoming students. If one of your students has a parent employed at a member school should be asked to seek TE certification.
- D. Personalize the conversion process with applicants. Ask faculty and staff who want TE scholarships to help in the conversion process. Be sure the applicant is contacted by phone, and if possible, invite the student and family to visit the campus.
- E. Send a mailing that promotes the institution's strengths and solicits TE import applications.
 - a Target feeder schools, TE schools, or all regional schools.
- F. Host a gathering for TELOs in the region to introduce your institution.

Too Many Import Applicants

Highly selective institutions may receive more applications for TE scholarships from candidates who meet their standard admission requirements can be awarded. Candidates should be advised of the school's highly competitive admissions. To select among candidates, most institutions either:

- A. Ask the Enrollment Management staff to rank the TE candidates by the same criteria used for merit scholarships; □
- B. Award scholarships on a need basis or draw names by lottery.

Some institutions have employed a first-come, first-served selection process, which often generates confusion among applicants. A well-publicized submission date in January or February might be a preferable alternative.

Too Few Export Applicants

Few TE members experience this problem. However, for those that do, we suggest institutions:

- A. Market the program effectively – newsletter, announcements, Intranet, meetings, benefit fairs, new employee orientations, Enrollment Reports, etc.
- B. Survey potential recipients.
- C. Expand eligibility to all employees by reducing or eliminating years of service requirements.
- D. Promote graduate programs.
- E. Establish contact in Human Resources. Meet with them and give their name to TE Central for the mailing list.
- F. Help TE expand membership in your region.
- G. Utilize TE's flexible guidelines by certifying as many students as possible rather than waiting for imports to be accepted by the receiving institution.

Such institutions should research whether the lack of interest is simply the result of a demographic oddity, indicating that demand will increase as the number of college-age dependents increases or if it is because students perceive a lack of desirable schools in desirable areas.

Too Many Export Applicants

Many TE members must deal with this issue. TELOs can:

- A. Ensure that campus communications about TE avoid the implication that the program is a guaranteed employment benefit. Instead, emphasize the high demand for the program and the regrettable fact that all those eligible may not be able to use it at every TE member school, especially when it is highly competitive for admission.
- B. Raise the years-of-service requirement for eligibility. Please be aware that limiting TE eligibility to only some categories of full-time employees may jeopardize the tax-free status of scholarships awarded.

Good and Effective Practices

Communicating with Other Campus Offices

The nature of the TE program requires that the TELO work closely with institutional colleagues across campus.

The Enrollment Management and Admissions Office

Admissions is usually a TE candidate's first point of contact with the campus. Admissions Counselors may be asked to assess whether a candidate is a good match for the institution. The Admissions Counselors should offer them realistic advice about their chances. Campuses with more applicants for TE import scholarships than they can accept may use the admissions staff to rank the applicants. On campuses requiring more imports, the TELO and admissions staff may work together to court promising applicants. Sometimes, a TE candidate who cannot be accommodated immediately will enroll in hopes of receiving a TE scholarship within a year or two.

The Financial Aid Office

The FA Office is involved whenever campuses require that TE candidates apply for other grants, such as the Federal Pell Grant or state grants. TE candidates may also seek need based financial aid on their initiative.

Other on-campus offices

Depending on the campus structure, the TELO may also receive substantial assistance. The Human Resources Office confirms employee eligibility and may also help assess future demand for the TE program by projecting the numbers of eligible employees and dependents in the coming years.

The Business or Financial Affairs Office may be essential in determining how many import student scholarships the institution can award each year.

The Registrar's Office verifies the actual enrollment of accepted TE imports.

STUDENT AFFAIRS AND ACADEMIC STAFF MAY BE INVOLVED when TE imports scholars with academic or behavioral problems.

Communicating with another TELO

Communication with TELOs at other TE member institutions is critical. Every TE scholar is, in a sense, the concern of two institutions, a circumstance that can easily lead to confusion. One telephone call or email may provide information or resolve confusion, which, if ignored, could eventually cause real problems. TELOs should follow up with each other when there has been no response to a TE-EZ Online Application. They should notify the other TELO when a student withdraws from School or takes an LOA. They should resolve discrepancies in the *Enrollment Report* and note and respect the scholarship limitations.

Communicating with TE Central

The primary purpose of TE Central is to develop and implement policies and procedures that promote exchange, recruit additional colleges and universities to become TE members, and help member institutions manage their campus-based TE programs. TE Central oversees the exchanges, maintains a database that records the scholarships reported by TE members, and computes each member's import/export balance.

Recognizing that managing the TE program on campus is often one of many assignments, TE Central looks for ways to assist TELOs.

Besides assisting with preparing Enrollment Reports and monthly webinars, TE offers advice by phone and email, publishes the TELO Handbook, keeps the website current, and provides training opportunities throughout the year. TE Central's staff welcomes inquiries and suggestions from TELOs.

Communication with TE Central is an essential aspect of TELO's role. The following is a list of the reports and statements that TE Central will generate and which require a response from each TELO.

TE Membership Survey

The TE membership survey is available electronically inside the TELO portal. The survey provides valuable information, such as an annual list of members offering graduate, professional School, or study abroad opportunities. Other data is vital for TE's policy setting and long-range planning for member services. Please complete the survey as soon as possible but before the published deadline.

TE Enrollment Report*

The TE Enrollment Report reflects the information in the TE database for the Institution: Export student data, import student data, and the TELO's name, address, telephone number, and email address. TELOs should verify the student enrollment data, correct any errors in the contact information, and list all new TE exports and imports and continuing students returning to School after an absence of a semester or more. Add your institution's tuition and fee charges and the value of the TE scholarships awarded for the current academic year.

Note: the TE exchange system counts semester units, not students. Placing "1" in the column under "number of semesters" represents one semester of study (fall, spring, or summer), whether full-time or part-time. Institutions that operate quarterly should count the winter and spring terms as one unit for spring. Fractions are not acceptable. We cannot overemphasize the importance of the accuracy of the TE Membership Survey and Enrollment Report. The student data provides the basis for TE's billing and balance accounting. The TELO information is circulated to all TELOs, who depend upon accurate

listings to communicate with one another. Please take the time to check all the information on the TE Enrollment Report.

The Enrollment Report is completed initially online after School begins in the fall. The initial due date is September 30. After each enrollment term, the TELO is expected to review the report, update it, and add as needed. If new students subsequently enroll for the spring semester or current students withdraw, update the Enrollment Report. If the report is not completed on time, TE Central will run the report and charge the school a processing fee of at least \$50.

Annual Membership Dues Statement

Invoices will be provided in late June. Membership dues are for the calendar period of July 1, 202X, to June 30, 202Y. Annual membership dues are due on July 1.

Balance Sheet

The Balance Sheet is an analysis that shows the cumulative exchange and balance for the most current five-year period. TELOs should review the Balance Sheet for accuracy and notify TE Central if any errors are found. The report also warns TE Central and the Institution if its balance is weighed too heavily on the export side. TE Central may issue a formal caution or an alert to the school depending on the imbalance.

TE Participation Fees Statement

The participation fee is charged to all EXPORT students and DC 3 Imports. This invoice appears once you submit your Enrollment Report. If subsequent adjustments are made for new student enrollments or withdrawals, the statement will be revised, and TE Central will rebate overpayments upon request in the spring.

Suggested Time Schedule of TE Program Administration

TE Central operates on an annual schedule, and most campus programs find it efficient to establish a schedule. Programs work well on different schedules, too: Having a plan and

ensuring it meshes as well as possible with TE Central's schedule and events on your campus is essential. We suggest the following as a sample campus schedule.

January – review your Enrollment Report for correctness and update as needed.

February – review and approve or deny NEW Imports. Re-certifications are now open.

March - maintain positive communication with Financial Aid, Admissions, and imports.

April – finalize import decisions; respond to TE Central's May 1 space available survey.

May – confirm all import decisions are up-to-date, and Export students are re-certified.

June – Export schools confirm employee eligibility and all eligible students are re-certified; Import schools confirm continuing student eligibility; update Enrollment Report, make sure continuing student EXPIRATION dates are correct; print the Enrollment Report and Final Balance Sheet. Attend mandatory training.

July – Import schools confirm that continuing students are enrolled for next term, and new import students are scheduled to enroll; Submit Annual membership dues. Attend mandatory training.

August – review View Applicants to confirm all new Import TE student decisions reflect the correct status. Import schools click the Enrolled box for all newly enrolled Imports. Review the Enrollment Report to ensure all continuing students are listed. Attend mandatory training.

September – Import schools click the Enrolled box for all new Imports. Export schools click ADD Student when you receive the email message. Make sure all continuing students show on your Enrollment Report. Submit your Enrollment Report and pay your Participation Fees.

October – review and update your Mandatory Institutional Profile; review your TE guidelines; update, publish, and communicate any guideline changes; host employee informational sessions; begin reviewing new applications.

November – continue to approve eligible Export TE-EZ Online Applications or add eligible export apps; share Import app details with Admissions.

December – continue to approve eligible TE export requests; share Imports app details; review your Enrollment Report for correctness.

Glossary

DC 3 (Double Credit 3) - DC 3 offers TE semester credit on the TE Enrollment Summary sheet for up to three students annually for other exchange program placements. The TE member institution pays the TE participation fee per Import from another program to obtain credit.

Dependent – TE institutional members determine this definition. TE Central encourages all member schools to consider following the Free Application for Federal Student Aid definition of dependent. At a minimum, the defined dependent must include the eligible employee's dependents as defined by the IRS. It can consist of the employee, employee spouse, or recognized domestic partner and children, as defined by the current IRS definition. The term used by the IRS is defined in Title 26, Subtitle A, Chapter 1, Subchapter B, Part V, Section 152 of the Internal Revenue Code. (See also [IRS Publication 501.](#))

Eligibility Guidelines—Every member school establishes eligibility guidelines to define the qualifications an employee must meet to be eligible to participate in the TE program.

Enrollment Summary Report – an electronic confirmation of the current academic year's TE import and export scholars. A fluid document that should be reviewed at least twice each semester.

Exporting or Sending Institution - the member that sends out export students under TE.

Exports - scholars sent out to other institutions on a TE scholarship.

Good standing – typically, all TE member institutions are in good standing unless financial obligations are not current or there are excessive exports versus minimal imports. See Restriction for additional information.

Host or Receiving institution - the TE member school that awards a candidate a scholarship under TE.

Imports - scholars brought in on a TE scholarship from other TE institutions.

Import/Export Balance – While the Balance Sheet is a thing of the past, the institution's balance between semester units for imported students and semester units for exported students is still an expectation.

Safe School – is considered a TE member institution with a high ratio of acceptances and TE offers.

Satisfactory administrative standing - all dues are paid in full, and the Enrollment Summary Report will be on file by September 30.

Set Rate – available for schools with higher tuition – the amount set by the TE Board of Directors each year based on its analysis of tuition costs reported by TE member institutions on the annual TE survey. The Set Rate is determined on a weighted average of all TE member institutions' tuition amounts. TE members who charge higher tuition are permitted to award TE scholarships for less than the total amount of their tuition but not less than the set Rate for the academic year.

Restriction - As determined by a TE Central staff review, the institution has not met its financial obligations or has excessive exports and minimal imports. Standing commitments must be honored. Restricted institutions will not be allowed to make new export commitments and are expected to increase import commitments until the balance improves. In all cases, the school's president is notified.

Semester Units—TE scholarships are calculated based on semester units, such as a full-time scholarship for one semester. A full four-year scholarship for undergraduate study is counted as eight semester units. A two-year scholarship would equal four semester units, and so forth.

TE Candidates - dependents or family members of employees certified as candidates by the sponsoring TELO and are applying for a TE Scholarship. See Dependent above. TE

Central encourages all member schools to consider following the Free Application for Federal Student Aid definition of dependent.

TELO is the tuition Exchange Liaison Officer, the individual appointed by the institution to administer the campus' Tuition Exchange program.

TE Scholars - students who are studying under the sponsorship of a TE Scholarship.

APPENDIX A

Policies Governing the Administration of TE Scholarships

Although Tuition Exchange, Inc. prides itself on enabling its members with the flexibility to devise campus programs that meet each institution's needs, all members are expected to adhere to TE's fundamental policies. These are contracted in the original membership agreement each institution signs with TE. Below is a suggested template.

Tuition Exchange Student Eligibility Guidelines for _____

Available online at

https://www.tuitionexchange.org/vnews/display.v/ART/634992006594d?in_archive=1

TUITION EXCHANGE Liaison Officer (s):

____(name works with exports in Human Resources)_____

____(name works with imports in Enrollment Management)_____

Email: _____@_____.edu

Email: _____@_____.edu

(TE Central suggests creating a generic email like TEOfficer@_____.edu)

Office phone number(s) (____) ____ - _____

Office Address(es)_____

Office hours: _____

The NAME OF SCHOOL retains the right to modify, change or revise these guidelines.

Current TE recipients – imports and exports shall be notified of any changes. Tuition

Exchange is an exchange program that __(Institution)_____ belongs to and, as

such, can offer additional educational opportunities to our employees. There is no

guarantee that your dependent will be able to utilize the program. Tuition Exchange is a scholarship program and is not an employee benefit.

Import application details:

1. Any TE import applicant wishing to be fully considered for a TE award must complete the admission process and be fully admitted before any official TE award is offered.
2. Only import applications from prospective, first-time students are considered.
 - a. First time import transfer students to _____ are eligible (not eligible) to apply
 - b. Current _____ students are eligible (not eligible) to apply for import consideration.
3. TE Import awards are available to: A.Students:
 - a. Any imported student – regardless of program, study, class standing, or enrollment status.
 - b. Any imported degree-seeking undergraduate
4. Undergraduates - enrolled less than full-time.
 - A. Full time is defined as _____
 - B. Degree-seeking means a fully admitted student seeking a bachelor's degree.
 - C. Online programs

D. Certificate programs

E. Summer school – note that summer school is considered an entire semester of TE. Be sure to share with students that using TE in the summer may not be the best use of their eight semesters.

5. Undergraduates enrolled full-time on the main campus only. A. The main campus is defined as:

B. Other eligible campuses:

6. Any Import degree-seeking graduate or professional student A. Graduate or professional students are defined as:

The employee and spouse/registered domestic partner, or

7. Degree-seeking means:

A. Graduate or professional students who are enrolled less than full-time.

8. Full-time is defined as:

9. Graduates enrolled full-time on the main campus only A. The main campus is defined as:

B. Other eligible campuses:

C. Any imported student who is fully admissible to the university or colleges within the university

10. TE-EZ Online Application Process and Timeline:

- A. Request the Export School TUITION EXCHANGE Liaison Officer (TELO) approve the TE-EZ Online Application to_____.
- B. TUITION EXCHANGE priority date to receive import TE applications is _____.
- a. Priority date means that import applications with completed Admissions and TE applications are considered first. Import TE applications received after this date will be considered on a first-come, first-served basis, provided TE spots remain available.
 - b. _____ reserves the right to limit the number of TE import award offers in any given year.
 - c. In the case of a GAP year (defined as not enrolling at another post-secondary institution during the entire GAP year), _____ the student will need to complete a new application for TE scholarship consideration.
 1. _____ will (will not) hold a spot for a TE Import awarded student (clarify how long you will maintain the place (i.e., one academic year). (If not, add process expectations here.) Please note that while the Import school

may reserve a spot for a GAP student, the student must complete a new application with the Export school.

- d. First-time TE import recipients meeting the priority date are notified no later than _____ (March 15). The TE award will be a part of the student's financial aid notification.
- e. First time _____(March 15) TE import recipients have until MAY 1 to accept or decline the TE award.
 - i. New students are expected to submit the Admissions Deposit, which must be received by May 1 for the TE award to be considered firm.
 - ii. If a TE award is offered later, the student has two weeks to accept or decline, and the Admissions Deposit must be received with the acceptance notification.
- f. The EXPORT school is responsible for confirming (re-certifying) current TE scholars' continued Export eligibility.
 - i. Once spring grades are released, funding is a part of the financial aid award notification for continuing the TE award.
 - ii. If not, confirm with the Exporting school that the application was recertified. If yes, check with the TELO at your Importing (attending) School.

g. Common issues include: the student did not.

i. Register for the following semester's classes.

ii. Academic eligibility. iii. Complete the required application

process. iv. Has utilized the maximum number of eligible semesters.

v. Student Eligibility

vi. First undergraduate degree full-time attendance: 8 semesters or

graduation, whichever is first; first undergraduate degree part-time

attendance is an option. Yes or No. (Please note that the Import

school will be responsible for monitoring part-time usage in conjunction

with the Export school) or semesters or graduation, whichever is first,

C. Graduate/professional students, four (4) semesters or graduation, whichever is first.

a. Graduate/professional students part-time,

b. Semesters or graduation, whichever is first,

c. Enrollment in dissertation, fellowship, or internship hours is not

TE-eligible. *Enrolling less than full-time in any semester or term (including

summer or interterm/January term) counts as a semester. Pro-ration is not an

option.

TE SUGGESTED CONSIDERATION

Undergraduate TE Import awarded students must complete the Free Application for Federal Student Aid in their initial year. (FAFSA)

1. For import students residing on campus, any qualifying federal Pell Grant dollars will be available to help pay for costs beyond tuition.
2. Any qualifying federal Pell Grant dollars for import students residing off-campus will be deducted from the TE award.
3. _____ State statute requires state grant dollars to be applied to tuition and counted as part of the Tuition Exchange scholarship award.
4. If the family does not qualify for federal Pell or State grant dollars in the initial year, the family is not required to make subsequent FAFSA applications.
5. Graduate students are not required to complete the FAFSA.
6. If the import student does qualify, the student and family must continue to complete the annual FAFSA application.
 - a. If the FAFSA application is not received at the time of the award notification, the TE import award may be reduced by the annual maximum federal Pell Grant and maximum state grant allowable.
7. Financial aid application process questions should be directed to the Financial Aid Office.
8. Any institutional grant/scholarship funding awarded to the student is a part of the total Tuition Exchange award (or ____ amount of institutional funding is separate, an add-on, to the TE scholarship award

9. TE import-awarded students are required to maintain Satisfactory Academic Progress as defined by the college. In addition, the student must maintain a minimum _____ GPA. Refer to the college catalog for specific information regarding Satisfactory Academic Progress standards.

10 TE import award recipients are encouraged to apply for outside scholarships. These dollars are available to help the student and family pay for college costs beyond tuition.

11. _____ reserves the right to review this statement if a student garners funds more than the annual Cost of Attendance. For additional information, contact the Financial Aid Office.

12. A TE import award at _____ carries a value of full Tuition or (Tuition Exchange annually established Set Rate) less any federal and state dollars (as noted in items 2 and 3 above) and institutional grant/scholarship.

a. The value of the annual imported TE award is adjusted annually. (Except when the university freezes students' tuition in previously identified situations.) 13 All TE scholars must live on campus to receive the TE scholarship.

15 Each successful Import is charged a fee of _____ annually. This fee helps cover the program administration costs. The student will be notified of the amount of this fee charge against the TE scholarship award amount at the time of the TE scholarship award.

Students wishing to attend a school other than _____ are encouraged to review the Tuition Exchange website. www.tuitionexchange.org. The family section provides the names of all TE member schools and general program information. The scholar must know the Import school deadlines and any other TE-specific requirements.

Export application details:

Any TE export applicant wishing to be considered for TE export consideration must complete the TE-EZ Online Application. The application is available online at: www.tuitionexchange.org.

1. Export eligibility: the individual seeking to be exported must be a dependent of the _____ employee. The term legally dependent child shall be limited to children claimed on the employee's most recent federal income tax return or named to receive support for education in a legal separation agreement or divorce decree issued by the court.
2. The employee must be full-time and have completed ____ months/years of continuous service. (Service from previous higher education institution ___is or ___ is not counted).
 - a. Part-time staff, temporary or on-call staff, adjunct or visiting faculty members ___are ___are not eligible for TE award consideration for dependents as defined in 1 above.
3. In the case of retirement, reduction in force/layoff, disabled, deceased employee (parent), or other mitigating circumstances regarding TE eligibility, should contact the TE Liaison Officer regarding export eligibility (all of these categories can be listed separately

and indicate whether TE scholarship export eligibility is available or not versus contacting the TELO).

4. Former employee separation agreements may allow TE eligibility.
5. _____ will export only one dependent per family throughout a _____ (annually or four-year period). It is the family's responsibility to determine which dependent will be selected as the Import before making the original TE application.
 - a. Do not ask the school to submit multiple family applications to see which one is selected.
 - b. In the case of both parents employed by _____. It is still one Export per family.
 - c. _____ will allow more than one Export per family throughout four years.
6. Export eligibility includes _____ employee _____ employee's spouse _____ employee's recognized domestic partner.
7. First-year, first-time students will be given first consideration.
8. If a continuing student wishes to be exported, confirm with the attending (importing) School that a continuing student is eligible for TE.
9. Transfer students will be considered only for the remaining unfilled spots. Again, it is essential to check with the attending (importing) school to confirm that they will accept a transfer student and consider the student eligible for TE.

Export Eligibility details:

Tuition Exchange, Inc. reviews all members' five-year average balance of Exports and Imports. Members are allowed unlimited export applicant approvals for TE scholarship consideration at other member institutions and must offer no less than three annual new import TE scholarships.

Employees will be notified no later than_(date)_____ that it is time to apply for TE scholarship consideration for the following academic year.

1. The recommended priority date to apply for Tuition Exchange consideration is _____ .
 - a. If you miss this date, export applications will still be approved, but the student may not be considered for a TE scholarship at the importing School due to a limited number of awards being offered.
 - b. Some import schools can award on a first-come, first-served basis for newly admitted students.
2. For a TE scholar to be renewed for subsequent years (up to a maximum of 8 semesters or graduation, whichever is first), _____ will confirm that the employed parent has maintained employment eligibility after each grading period.
 - a. Should the parent leave _____ employment, the Import school will be notified that the student is no longer eligible after the term in which the employee separates.
 - b. If both parents work for _____, provided the other parent is eligible (see item 2 in the Export application details section), the TE-awarded student will retain eligibility. A new TE-EZ Online app is required

In mitigating employment circumstances, the employee must visit their supervisor directly for the next steps.

3. TE Award eligibility is a two-way street. In addition to the employee maintaining eligibility for Export, the student is responsible for maintaining academic progress and positive social deportment at the Importing School. Generally, this information is available in the Importing School's college catalog or student handbook.
 - a. Students who lose TE eligibility due to failure to maintain, as stated above, may not be considered for future export consideration to either the same or a new school.
4. In the case of a student transferring schools, _____ will continue to support the TE-awarded student for a maximum of 8 semesters or graduation, whichever is first; however, the TE school where the student is transferring has the right to refuse the Import request.
5. In the case of a student withdrawing from the educational program - _____ will consider continued Export support on a case-by-case review. Please visit with _____ (TELO) for specific requirements in this situation.
6. _____ will confirm with the enrolled student in mid-October and again in mid-February that the Exported student is still enrolled at the School of Import record.
7. Each successful Export is charged a fee of _____ annually. This fee helps cover the program administration fees. The employee will be notified in advance of a one-time annual payroll deduction in October OR pay the fee directly to the exporting School.

8. _____ will make available to all employees an annual report regarding TE award utilization for the most recent five-year period. The information does not reflect names and schools. The report is kept on file in the _____ office and is available for your review upon request.
9. Mitigating circumstances are reviewed case-by-case, and the decision is final and non-appealable.

If the member schools choose to create their policies, the following items must be included.

The Purpose of TE Scholarships. Most TE scholarships are awarded for full-time undergraduate degree study. Study-abroad and special programs may be offered as part of a four-year TE scholarship or to students certified as eligible by the sending institution for the study-abroad semester only.

The Value of TE Scholarships. TE Scholarships must cover full tuition for the entire scholarship term, with the exceptions noted below under other Financial Aid and High Tuition. Schools may offer more than tuition. TE members can, but are not required, include special fees, room, and board costs in the TE scholarship. Some members who do so hope to attract more import applicants and enrollees. Most members offer TE scholarships equal to their academic year tuition but do not include special fees, course overloads, or room and board charges. Because colleges and universities require various charges, students and their families may be confused about the amount of their TE scholarship award. Institutions accepting TE imports must inform these students upon acceptance precisely what costs the TE scholarship covers and what additional charges they must pay.

Other Financial Aid. TE scholarships may be considered part of a student's financial aid package. TE members may require applicants for TE scholarships to apply for financial aid. They may reduce the value of the TE scholarship by the

amount of Federal Pell Grant, state grants, or other institutional scholarship/grant awards. Some institutions offer TE scholars such aid in addition to the value of the TE scholarship. Some state laws require institutions to charge specific course fees, even to TE scholars.

Optional Set Tuition Rate for Schools with Higher Tuition. The exception to TE's full tuition policy applies exclusively to our members who charge higher tuition. These members have the option but are not required to award TE scholarships for less than the total amount of their tuition. They may not, however, award less than the limit established by the Tuition Exchange Board of Directors. However, public institutions may award TE scholarships for out-of-state students who pay out-of-state tuition at one-half of the tuition amount. This information is provided annually to all TELOs and is available on the website under the Liaison Officer section.

Duration of TE Scholarships. Most TE scholarships cover four years (eight-semester units) of full-time undergraduate education. Institutions can extend a scholarship for a fifth year in particular circumstances upon consultation between the sending and receiving institutions. The decision is final and cannot be appealed.

Institutions may also limit scholarships to fewer than eight semesters of support or determine candidacy for TE scholarships to entering first-year students, upper-class students, or some other classification, such as specific majors or degree programs. Institutions may support part-time study, but TE assesses part-time study as one semester. There is no pro-ration option.

Receiving institutions have the right to terminate a TE scholarship if a student is not meeting the articulated standards of academic performance and personal conduct required of its enrolled students or as stipulated in its award letter.

Limitations must be clearly stated on the student's original TE scholarship award notification and noted on the online TE scholarship approval. Otherwise, institutions are not permitted to revoke scholarship commitments.

Taxation. The Tuition Exchange, Inc. recommends that its members declare all categories of employees eligible for the TE program. For specific information, check out the IRS website, Publication 970.

Every member school is encouraged to seek expert advice when formulating policy for the certification of candidates and award of scholarships, especially regarding when the scholarship is deemed to be part of taxable income, how it should be reported, and that the school's policies do not discriminate in favor of highly compensated employees.

Eligibility for Export Scholarships. The family members of employees at TE member institutions are the only people eligible to apply for TE scholarships. TE requires all members to establish a written eligibility policy, which should define in detail "eligible employees," "dependents," and "family members" for the campus program. This written policy should be made available to all employees, preferably as part of the personnel manual or similar booklet setting forth conditions and benefits of employment. Many members apply their tuition remission rules to the TE program.

The eligibility policy is a vital tool for administering the campus TE program. It protects the TE member school against unanticipated conflicts and employees against attempts to influence campus figures to determine the selection of candidates for TE scholarships unfairly.

Definition of Eligible Employees - Policies should cover and clarify the following:

TE member school policies should address and clarify categories of employment (faculty, administrators, staff, retirees, etc.) or classes and employment status (full-time, part-time, hours worked per week, credit-hour teaching load). It is also suggested that the policy discuss mitigating circumstances like employees who cease to be eligible during the school year.

Although TE was initially established to assist the dependents of faculty members only, TE Central encourages its members to extend eligibility to all categories of employees, including administrative and support staff, in the interest of equity due to the IRS code (see Taxation). Most TE members have adopted inclusive policies for full-time employees.

Employees must not assume that the TE scholarship is an automatic employment benefit, like school-provided health insurance or retirement programs. If the institution's written policies explain this, it may help avoid future disappointment and even conflict.

1. Coverage for family members of *deceased employees*. Whether the employee dies before the student is certified as eligible while applying for a scholarship or after enrollment; institutions usually continue an awarded scholarship through graduation or the end of the current academic year.
2. Coverage for family members of an *employee who separates* from employment. Whether the separation occurs before the student is certified as eligible, while applying for a scholarship, or after the student has enrolled. Institutions usually bar dependents who were not yet certified as eligible at the time of termination and those who have not yet started the upcoming semester/term. Students actively attending classes when the employee announces his leave are usually supported for the remainder of the semester or, in some cases, the entire

academic year. Policies may wish to distinguish between voluntary termination or termination for cause and other categories of termination, such as retirement.

3. *Years of service requirement.* This includes years employed by the institution, uninterrupted vs. interrupted employment, and whether years of eligibility service can be waived if a new employee had this opportunity at another institution, already has family members on the exchange, or by written exception at the time of hire.

- i A word of caution when allowing previous years of service. This must be offered to all employees, not upper leadership.

Definition of Family Member - TE members also have flexibility in describing dependents or family members. Most institutions limit the term to include only the children of employees and have refined the definition to include stipulations concerning the age of the child and children who are or are not listed as dependents on the employee's tax return. Others consider spouses, registered domestic partners, or the employees themselves eligible. Defining "dependent" or "family members" clearly is essential to ensure that employees understand the policy because it can affect whether the IRS would view the TE scholarship as income taxable to the employee.

Scope of Coverage - Most TE programs cover undergraduate study only. The eligibility policy should also state whether candidates may apply for TE scholarships for graduate study, summer school, intersession courses, special programs, or study-abroad semesters.

In all cases, summer school, special programs, study-abroad, and intersession courses utilize a full semester of student eligibility.

Application Process—The eligibility policy should indicate the steps the candidate must take to apply for a TE scholarship.

Standards for Admittance—New candidates applying for TE scholarships must meet the institution's admissions criteria. They may have to meet more demanding standards if the institution has instituted the guidelines as the measurement for the selection of TE applicants.

Continuing TE students must maintain the academic and behavioral standards required of all students by their receiving institution and other standards set forth on the original TE scholarship award offer and noted on the initial TE scholarship approval.

Review and Selection of Import Scholarship Students of TE have considerable freedom to develop their policies and procedures governing the award of scholarships to incoming or "import" students. TE requires, however, that each of its members establish written guidelines for the selection of TE scholars, which should include the following topics:

Eligibility - The guidelines should specify that to be considered for a TE Scholarship, all applicants must be certified as TE candidates by their sending institution.

Coverage of Award - The guidelines should specify whether TE scholarships may or may not be used for graduate study, summer school, intercession courses, or special or study abroad programs as part of or in addition to undergraduate study.

Amount of Scholarship Award - Institutions should carefully consider the monetary value of the scholarship award. The scholarship award amount is reported on the original TE Membership Agreement, the TE Annual Reports, Enrollment Reports, and Enrollment Summary Reports filed with TE Central. The guidelines should also specify whether TE scholars are eligible for student employment or other campus

aid programs. Institutions may also require TE candidates to apply for financial aid.

Criteria for Scholarship Award - All applicants for TE scholarships must, of course, meet the institution's general admissions requirements. The guidelines should also note other criteria. Institutions should also establish a written policy for selecting candidates that meet the admission requirements in case more candidates apply each year than the institution can accommodate. Most institutions rank these candidates by academic merit criteria and financial need. If an academically qualified student is denied a TE scholarship solely because the institution could not offer every accepted student a TE scholarship, and that student enrolls at the institution anyway, the student should be prioritized for a future year TE scholarship.

The number of Import Scholarship Awards - TE places no limit on the number of import scholarships an institution may choose to award. However, many institutions will want to establish some limit, and the guidelines should note this possibility, if not the exact number.

Duration of Import Scholarship Awards - Most TE scholarships are awarded for four years, eight semesters, or graduation of a first-time undergraduate student. Still, some TE members have decided to limit scholarships to two or three years or only to upperclassmen. The guidelines must offer TE candidates clear guidance on these points since students for whom financial aid is necessary might be forced to apply elsewhere. Transferring students or entering freshmen with college credit should be reviewed, and a written notification should be provided to student alerting them to their maximum time frame of TE eligibility.

Priority Deadlines - The guidelines should inform students of the date by which they will be notified whether they have received a TE scholarship and of the date by

which the institution needs an answer about whether they accept or decline the scholarship award. We encourage schools to announce initial awards no later than April 1.

Contact Person - Include the TELO's name, telephone number, physical campus address, and email address in the guidelines. TE Central provides names and email addresses only. Tuition Exchange lists May primary TELOs on our website as a courtesy to families seeking information.

Balance Sheet Update – October 2020 from R. Bob Shorb



October 29, 2020

Dear President,

Thank you for your institution's continued membership in the Tuition Exchange (TE). With your institution's ongoing support, the Exchange maintains the fine tradition of offering opportunities for every educational pursuit. We are confident that there is a Tuition Exchange school for every student.

I am pleased to share that 2019-20 membership was over 680 schools, with more than 7,700 TE students receiving more than \$250 million in TE scholarships from member institutions. Providing students access to higher education through scholarships is truly remarkable. We can never provide families this level of support without you!

Nationally, many post-secondary institutions struggle financially, and more did not meet the anticipated enrollment and revenue goals. The pandemic has further exasperated the issues with questions like how to enroll – online or on campus. Change seems to be the norm in 2020-21, as each institution's future operations are being reimaged, sometimes hourly.

Recently the Tuition Exchange redesigned the website and marketing publications. The new logo and branding are fresh and show the door to education open and welcoming. The new marketing plan includes expanding our membership footprint. We recently reached out to many historically black colleges and universities, encouraging each to add their name to our membership roster. As our membership base increases, more student scholarship opportunities become available. We appreciate your encouraging words to non-member schools as well.

Effective November 1, 2020, Tuition Exchange is eliminating the balance sheet requirement. What does this mean for your employees? Your institution can now certify all eligible export applicants for TE scholarship consideration. Yes, unlimited export certifications. Your institution will still retain its internal institutional guidelines, such as a minimum number of years of service, full-time employee position, and the like when determining eligible employees. We believe these changes will provide your institution future success in two ways: Potentially more student applications will be generated through the change in export options, and your employees and their families will be provided with more TE scholarship opportunities.

Institutions still control the number of TE scholarships offered to imported students. Each member school is expected to offer no less than three incoming TE scholarships annually to maintain good standing with the Exchange. Of course, the incoming student must meet your institution's admission criteria. Tuition Exchange is not increasing the cost of membership dues or fees for the 2021-22 academic year. The TE scholarship value continues under the same approach: full tuition, set rate for higher tuition private schools, and appropriate rates for public institutions.

We are confident that the Tuition Exchange is the exchange program of choice. Thank you for your membership. We look forward to many more years of collaboration. Should you have any additional questions about the program, we encourage you to visit with your TE Liaison Officer or contact Janet Hanson, Director of Communications at 402.418.1081, or me at 518.859.7301.

Sincerely,

Bob Shorb

Robert "Bob" D. Shorb
Executive Director/CEO
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